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# CORPORATE GOVERNANCE AND RESEARCH & DEVELOPMENT STUDIES

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## *Introduction*

# Between Synthesis and Fieldwork: An Introduction to the Issue

*Raffaella Montera*[*]

*No abstract is available for this article*

The preceding issue of Corporate Governance and Research & Development Studies was a Special Issue on the exploratory power of the qualitative approach and the case method. The present issue brings together six articles that differ in topic, method, and the kind of claim they make. Part of the earlier conversation nonetheless continues here: two articles are single-case studies, and a third reflects on ethnography and autoethnography as ways of studying organizations from within. The other three, by contrast, take stock of bodies of literature – on student entrepreneurship, on digital marketing and consumer behaviour, on organizational routines and scale-up – and ask what that literature has established and what it has left open.

These are two different ways of producing knowledge, and it is worth saying briefly why they sit well in the same issue. Review articles are no longer regarded as preliminary summaries. When conducted transparently they are studies in their own right (Kraus *et al.*, 2022), and their value lies less in cataloguing than in what they allow to be seen: the structure of a field, its dominant theories, the questions it keeps postponing (Paul and Criado, 2020; Post *et al.*, 2020; Mukherjee *et al.*, 2022). Case studies and fieldwork operate at the opposite distance. They give up breadth to stay close to a setting, and what they return are mechanisms and constructs that large samples seldom reveal (Eisenhardt and Graebner, 2007; Watson, 2011; Gioia *et al.*, 2013). The two modes depend on each other more than their separate

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literatures suggest: a review shows where a field has become repetitive, and close observation is often what supplies the next concept. The case for methodological pluralism in management research (Christofi *et al.*, 2024) is easier to make with examples in hand, and this issue offers six.

The issue opens with Confetto and Manta (this issue), who study how immersive technologies are put to work in the valorization of cultural heritage. Their case is Cultura Immersiva, an Italian start-up founded in 2021 that develops virtual reality experiences for cultural and tourism heritage. The evidence comes from in-depth interviews with its two founders, a computer engineer and a creative director with a long career in theatre, complemented by archival and media material and analysed abductively. The authors adopt a socio-technical lens and argue against reading immersion as a property of the hardware. In the case they describe, technology is kept deliberately "invisible" and subordinated to narrative structure and emotional pacing, so that immersive storytelling acts as a cognitive mediator that reduces the symbolic distance between heritage and less engaged audiences. On the theoretical side, the article reconceptualizes immersion as a situated process of experiential orchestration; it treats authenticity as a negotiated, practice-based outcome that sets boundaries on design, not as a fixed attribute of material objects; and it describes user participation as generative and only partly controllable. It also reads the friction between engineering and artistic logics as a source of innovation, which connects the study to research on hybrid organizing and institutional logics.

Cucari *et al.* (this issue) move from one firm to an entire research community. The Global University Entrepreneurial Spirit Students' Survey (GUESSS), established in 2003, is a large international research project on student entrepreneurship, and the authors offer what they present as the first bibliometric review of the scholarship built on it. Using a hybrid design that combines performance analysis and science mapping with the tenets of a structured review, they analyse 117 Scopus-indexed articles and identify six thematic clusters: socio-demographic characteristics and entrepreneurial career paths; the entrepreneurial climate of higher education institutions; family business entrepreneurship; the multiplicity of contexts; personality traits and decision-making logics; country determinants and cross-cultural settings. The theoretical contribution is a map of the lenses on which this literature rests. The Theory of Planned Behavior (Ajzen, 1991) dominates several clusters, and the authors regard the reliance on intention-based models as a constraint, since starting a business is often a long and non-linear undertaking. They propose to widen the repertoire – toward the resource-based view, contingency and evolutionary perspectives, and configurational methods – and to reconsider access to the GUESSS data, which their performance analysis suggests are used mainly by the survey's national delegates.



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With Rota *et al.* (this issue) the issue returns to the single case, and to a setting far from digital platforms: Terelle, a mountain village in the province of Frosinone, where the organic winery *Fra i Monti* was founded in 2018. The authors ask how entrepreneurship re-emerges where depopulation and industrialization have interrupted an agricultural tradition, and they answer by bringing family business theory into dialogue with business history. Applying the Gioia methodology (Gioia *et al.*, 2013), they introduce territorial memory – the place-specific knowledge, practices and identity narratives that survive a historical rupture in degraded form and can be mobilized again – as the concept that links socioemotional wealth (Gómez-Mejía *et al.*, 2007), familiness and stewardship (Davis *et al.*, 1997). Three propositions follow: that territorial memory may carry socioemotional wealth where no family firm pre-exists; that recovered heritage knowledge may constitute a familiness that is territorial instead of genealogical; and that a stewardship orientation yields a business model suited to the premium positioning of artisanal, place-based markets and ill-suited to volume growth. The founders are not relatives, and the theoretical move of the article lies there: "family-type" entrepreneurship is defined by behaviour and governance logic, not by kinship.

Bashang *et al.* (this issue) go back to synthesis, this time with a systematic review conducted according to the PRISMA guidelines. From 892 records retrieved across five databases, 48 empirical studies published between 2015 and September 2025 are retained and organized around five digital marketing strategies: social media marketing, content marketing, online advertising, e-commerce experience, and personalized marketing. The contribution of the review is a conceptual framework that brings together Social Proof Theory, the Elaboration Likelihood Model, the Technology Acceptance Model and Relationship Marketing Theory. In this framework the five strategies, increasingly supported by artificial intelligence and by augmented and virtual reality, influence consumer engagement, trust and purchase intention, which in turn build brand loyalty; demographic characteristics, platform type, cultural context, privacy concerns and ethical transparency act as moderators. The gaps the authors identify – evidence from non-Western markets, longitudinal designs, the ethics of AI-based personalization – turn the framework into a research agenda.

Piccolo *et al.* (this issue) take up a question that recent work on scaling has left open. Scaling has been conceptualized as a dynamic capability, and its vocabulary has been harmonized (Jansen *et al.*, 2023; Coviello *et al.*, 2024), but through which routines growth intent becomes repeatable delivery remains underspecified. The authors address the question with a theoretically informed integrative synthesis that combines a Scopus-based corpus (87 records retained out of 229) with 24 foundational works, building on the view of routines as sources of both stability and change (Feldman and Pentland,



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2003). They distinguish five routine families – coordination, replication, control and measurement, learning and search, and boundary routines – and follow their changing salience across four periods between 1990 and 2025, which they use as analytical markers and not as historical breaks. The resulting trigger-to-mechanism framework makes two theoretical points. The same routine family can turn from accelerator into constraint as execution conditions change; and execution capability is configurational, in that it rests on complementarities among families more than on the presence of any one of them. Five propositions translate the argument into an agenda for longitudinal and comparative research.

The issue closes with Torchia *et al.* (this issue), whose article is conceptual and methodological. It retraces the history of ethnography (Van Maanen, 1988) and autoethnography, and their uneven diffusion across the subfields of business and management, and then works through two diary-based vignettes: one ethnographic, set in a member-owned football club in Manchester, the other autoethnographic, set in an adult dance class in northern Italy. Both concern inclusion and exclusion. The authors make two contributions. They conceptualize ethnography and autoethnography as positions along a continuum of reflexive involvement, not as opposed methods, and they develop diary vignettes as analytical devices through which access, reflexivity, ethics, writing and theorizing become visible. One further point matters for the readers of this journal. Governance, in these pages, is not confined to boards, ownership models and formal rules; it includes the informal, embodied and relational practices through which participation and belonging are regulated.

The six articles do not share a single thesis but read side by side they show three lines of continuity.

The first concerns entrepreneurship, which four articles observe at different moments. Cucari *et al.* deal with intentions and nascent activity among students; Confetto and Manta with a start-up in its first years; Piccolo *et al.* with the passage from episodic entrepreneurial action to repeatable execution; Rota *et al.* with entrepreneurship that begins again where a tradition had been interrupted. Taken in this order, the articles show how much the explanatory vocabulary changes along the way: intention models at the start, professional logics and legitimacy in the young venture, routines at scale, memory and stewardship where the horizon is the long term. That intention-based models account for only part of the path is, incidentally, one of the conclusions that the GUESSS review reaches about its own field.

The second line concerns technology, which three articles treat as something to be organized and not merely adopted. In Confetto and Manta the technology is subordinated to narrative; in Bashang *et al.* the effects of AI-based personalization and of augmented and virtual reality depend on trust,



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privacy concerns and ethical transparency; in Piccolo *et al.* digital and platform contexts alter which routines become binding. One convergence is worth noting. The systematic review lists the opportunities of immersive technologies among the under-explored areas of digital marketing research, and a case study in the same issue observes one such technology in use.

The third line is the one closest to the identity of this journal. None of the six articles deals with boards or ownership structures in the conventional sense, yet governance recurs. Rota *et al.* describe a governance logic driven by stewardship among founders who are not kin. Torchia *et al.* set the participatory governance of a supporter-owned club beside the informal mechanisms that regulate access and legitimacy in a group with no formal decision-making structure. Piccolo *et al.* argue that boundary routines – alliance and ecosystem governance, regulatory engagement – become constitutive of execution capability. Bashang *et al.* place transparency in the use of data among the conditions of consumer trust. The introduction to the Special Issue observed that case research extends the study of governance beyond formal structures, to cognitive, relational and inter-organizational mechanisms. The articles collected here, with different methods, point in the same direction.

A last remark concerns method. The three syntheses end by asking for the kind of evidence that the three field-based articles provide. Cucari *et al.* call for mixed and configurational designs alongside survey-based hypothesis testing; Bashang *et al.* for longitudinal and cross-cultural evidence; Piccolo *et al.* for process data on how routines are enacted, transferred and reconfigured. In the other direction, the propositions that Rota *et al.* derive from one winery, and the mechanisms that Confetto and Manta describe in one start-up, are offered for examination in other settings. Neither kind of work completes itself. A miscellaneous issue makes this visible in a way that a thematic one, by design, cannot.

I wish to thank Professor Salvatore Esposito De Falco for the opportunity to introduce this issue, and the authors, the reviewers and the editorial team for the work that made it possible. My thanks also go to Professors Taewoo Roh and Zsolt Havran, my fellow Guest Editors of the Special Issue, where the conversation continued in these pages began.

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# Configuring Immersive Storytelling for Cultural Heritage Valorization: Insights from an Interpretive Socio-Technical Case Study

*Maria Giovanna Confetto*[*], *Otilia Manta*[**]

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**Abstract**

This study investigates how innovative firms operating at the intersection of technology and heritage combine immersive tools with narrative design to support heritage valorization while addressing interdisciplinary and institutional challenges. Moving beyond technology-centric approaches, the paper adopts a socio-technical lens to examine the interplay between digital infrastructures, storytelling, and organizational practices in developing immersive experiences.

Drawing on an in-depth qualitative single-case study, the research focuses on Cultura Immersiva, an Italian innovative start-up developing virtual reality solutions to enhance the accessibility and engagement of cultural and tourism heritage. The empirical analysis draws on in-depth interviews with the two founders, whose different but complementary profiles combine technical and artistic expertise, supported by extensive archival and media materials. Through an abductive and multilevel analytical approach, the study uses the case to unpack micro-processes, relational dynamics, and institutional negotiations that are often overlooked by dominant quantitative approaches.

The findings reveal that the effectiveness of virtual environments depends on a strategic logic that subordinates technological sophistication to narrative structuring and emotional pacing. Immersive storytelling acts as a key cognitive mediator, reducing symbolic distance for less engaged audiences and transforming the visitor

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experience into a more active and participatory process. The study also highlights the organizational complexity underlying these initiatives, showing how the interplay between engineering, artistic creation, storytelling, and historical expertise is continuously negotiated in practice. Finally, tensions related to authenticity and the "edutainment" paradox are addressed through relational and design choices that use emotional engagement as an attentional anchor, supporting institutional legitimacy and long-term viability.

*Keywords:* Immersive Technologies; Virtual Reality (VR); Experience Design; Institutional Logics; Cultural Entrepreneurship; Qualitative Case Study

*Configurare lo storytelling immersivo per la valorizzazione del patrimonio culturale: uno studio di caso interpretativo in una prospettiva sociotecnica*

**Sommario**

Questo studio esamina come le imprese innovative che operano all'intersezione tra tecnologia e patrimonio culturale combinino strumenti immersivi e *narrative design* per supportare la valorizzazione dei beni culturali, affrontando al contempo sfide interdisciplinari e istituzionali. Superando gli approcci tecnocentrici, l'articolo adotta una prospettiva socio-tecnica per esaminare l'interazione tra infrastrutture digitali, narrazione e pratiche organizzative nello sviluppo di esperienze immersive.

Basandosi su uno studio di caso singolo qualitativo e approfondito, la ricerca si concentra su Cultura Immersiva, una start-up innovativa italiana che sviluppa soluzioni di realtà virtuale per migliorare l'accessibilità e il coinvolgimento del patrimonio culturale e turistico. L'analisi empirica si avvale di interviste approfondite ai due fondatori, i cui profili differenti ma complementari uniscono competenze tecniche e artistiche, supportate da un ricco materiale d'archivio e mediatico. Attraverso un approccio analitico abduttivo e multilivello, lo studio utilizza il caso per sviscerare i micro-processi, le dinamiche relazionali e i negoziati istituzionali che vengono spesso trascurati dagli approcci quantitativi dominanti.

I risultati rivelano che l'efficacia degli ambienti virtuali dipende da una logica strategica che subordina la sofisticazione tecnologica alla strutturazione narrativa e al ritmo emotivo. Lo *storytelling* immersivo agisce come un mediatore cognitivo chiave, riducendo la distanza simbolica per i pubblici meno coinvolti e trasformando l'esperienza del visitatore in un processo più attivo e partecipativo. Lo studio evidenzia inoltre la complessità organizzativa alla base di queste iniziative, mostrando come l'interazione tra ingegneria, creazione artistica, comunicazione e competenze storiche venga continuamente negoziata nella pratica. Infine, le tensioni relative all'autenticità e al paradosso dell'*edutainment* vengono affrontate attraverso scelte relazionali e di *design* che utilizzano il coinvolgimento emotivo come àncora attenzionale, sostenendo la legittimità istituzionale e la redditività a lungo termine.

*Parole chiave:* Tecnologie Immersive; Realtà Virtuale (VR); Experience Design; Logiche Istituzionali; Imprenditorialità Culturale; Studio di Caso Qualitativo



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## 1. Introduction

Immersive technologies – including Virtual Reality (VR), Augmented Reality (AR), and Extended Reality (XR) – are increasingly recognized as influential drivers within the cultural and creative industries (CCIs). Their capacity to simulate environments, engage multiple sensory channels, and generate a sense of presence has attracted sustained scholarly attention across disciplines such as information systems, management, and heritage studies (Slater and Sanchez-Vives, 2016; Riva *et al*., 2019; Radianti *et al*., 2020). Early research in museum and heritage contexts largely emphasized their potential to enhance learning outcomes, increase visitor engagement, and introduce interactive modes of content delivery (Bekele *et al*., 2018; Trunfio *et al*., 2021).

More recent contributions, however, have problematized technology-centric perspectives, warning against forms of technological determinism that overlook the contextual and organizational conditions shaping digital innovation (Flavián *et al*., 2019; Dwivedi *et al*., 2022). Within this evolving debate, immersive technologies are increasingly conceptualized as socio-technical configurations embedded in broader cultural, institutional, and experiential systems (Wickert *et al*., 2021). From this standpoint, the effectiveness of immersive experiences cannot be reduced to their technical features; rather, it depends on how they are designed, interpreted, and integrated into specific cultural settings, often characterized by strong traditions and normative constraints.

Despite these advances, the management literature still provides limited insight into the concrete development and management of immersive projects within organizations. Existing studies offer robust conceptualizations of immersion as a multidimensional phenomenon – encompassing sensory, emotional, and cognitive engagement (Flavián *et al*., 2019; Buhalis *et al*., 2023) – yet they rarely address the practical integration of these dimensions. In particular, we still know relatively little about the coordination between technological development and narrative-experiential design, the management of diverse professional logics, and organizational responses to institutional pressures related to legitimacy and authenticity.

These gaps are particularly relevant in cultural heritage contexts, where the introduction of immersive technologies may generate tensions between innovation and conservation. Prior research has highlighted issues such as the risk of over-entertainment, the challenge of maintaining historical accuracy, and the ambivalent reception of digital tools by traditional stakeholders (Champion, 2021; Rickly-Boyd, 2013). At the same time, the growing emphasis on audience engagement and accessibility places additional demands



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on organizations to develop experiences that are both meaningful and inclusive. This creates a complex balancing act that remains underexplored from a processual and organizational perspective.

To address this gap, this study investigates how immersive technologies are operationally orchestrated within an innovative cultural venture, focusing on the interplay between design practices, interdisciplinary collaboration, and institutional dynamics. Rather than assessing outcomes in terms of user satisfaction or technological performance, the paper aims to unpack the underlying mechanisms through which immersive experiences are conceived, negotiated, and refined over time.

The study is guided by the following research question: How do innovative cultural firms organize and manage immersive technologies in ways that enable cultural valorization while addressing interdisciplinary and institutional challenges?

To answer this question, the research adopts an interpretive qualitative approach based on a single-case study of Cultura Immersiva. Founded in Italy in 2021 through the collaboration between CEO Stefano Rainone, a computer engineer, and Creative Director Andrea Carraro, with over 50 years of experience in theatre, the company provides a particularly suitable empirical setting to explore the integration of heterogeneous competencies from its very inception. Since its foundation, the organization has progressively expanded its activities throughout Italy, developing immersive experiences that combine cultural storytelling, technological infrastructures, and educational objectives.

The empirical analysis draws on primary data from in-depth, semi-structured interviews with both founders, complemented by a rich set of secondary materials, including project documentation, institutional communications, and publicly available sources. This triangulation enables a comprehensive understanding of how immersive experiences are planned and implemented within a real-world organizational context (Yin, 2014; Eisenhardt and Graebner, 2007).

The remainder of the paper is structured as follows. Section 2 develops the conceptual background, focusing on immersive experience design, narrative mediation, and institutional dynamics in cultural heritage. Section 3 outlines the methodological approach and Section 4 presents the empirical findings. Section 5 discusses the results in relation to existing literature. Section 6 elaborates theoretical, managerial, and methodological implications. Section 7 concludes and outlines directions for future research.



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## 2. Conceptual Background

### *2.1 Immersive Technologies as Socio-Technical and Experiential Configurations*

Immersive technologies- including Virtual Reality (VR), Augmented Reality (AR), and Extended Reality (XR) – have become increasingly relevant within the cultural and creative industries due to their ability to reshape how cultural content is experienced and communicated. Early studies primarily emphasized their capacity to enhance engagement, interactivity, and learning outcomes (Bekele *et al*., 2018; Trunfio *et al*., 2021). More recent contributions, however, have progressively moved beyond technology-centric interpretations, highlighting the limitations of deterministic approaches that reduce immersive experiences to technical performance alone (Flavián *et al*., 2019; Dwivedi *et al*., 2022; Buhalis *et al*., 2023; Xi and Hamari, 2019).

Within this evolving perspective, immersive technologies are more appropriately understood as socio-technical and experiential configurations, whose effects depend on how they are embedded within broader organizational, cultural, and interpretive contexts (Wickert *et al*., 2021). Rather than generating value autonomously, these technologies require deliberate alignment with narrative structures, user expectations, and institutional settings. Consequently, immersion emerges not as an intrinsic property of the technology, but as a situated outcome shaped by design choices, contextual integration, and patterns of use.

This shift has progressively redirected attention from technological capabilities to the conditions under which immersive experiences become meaningful, highlighting the importance of examining how such configurations are concretely developed and enacted within cultural organizations.

### *2.2 Designing Immersion: Narrative Mediation, Experience Structuring, and Meaning-Making*

A growing body of research conceptualizes immersion as a multidimensional and subjective phenomenon, encompassing sensory stimulation, cognitive processing, emotional engagement, and behavioral involvement (Flavián *et al*., 2019; Buhalis *et al*., 2023; Loureiro *et al*., 2020). This has led to increasing scholarly attention on the configuration of immersive experiences, focusing on how elements such as spatial environments, interactivity,



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temporal pacing, and multisensory cues contribute to shaping the user journey (Riva *et al*., 2019; Champion, 2021; Tussyadiah *et al*., 2018).

Within this perspective, narrative plays a central role. Immersive environments do not merely present information; they actively structure how that information is interpreted and experienced. Drawing on constructivist approaches, cultural consumption is increasingly understood as a process of meaning-making in which users engage with and reinterpret content through situated interaction (Falk and Dierking, 2016; Maitlis and Christianson, 2014). Narrative frameworks therefore function as cognitive and interpretive scaffolds, enabling users to transform fragmented sensory inputs into coherent cultural understanding (Green, 2021).

At the same time, immersive experiences require the careful alignment of multiple experiential dimension. Emotional engagement, accessibility, and interpretive depth must be combined in ways that sustain attention without compromising complexity. This is particularly relevant in cultural heritage contexts, where immersive experiences are expected not only to captivate audiences, but also to support knowledge transmission and cultural interpretation. Recent discussions increasingly point to the need for integrated approaches that connect storytelling, interaction, and technological implementation within unified experiential logics (tom Dieck and Jung, 2017; Neuhofer and Buhalis, 2014).

## *2.3 Institutional Logics and Organizational Challenges in Digital Heritage*

The integration of immersive technologies into cultural heritage contexts introduces a range of structural tensions that extend beyond design considerations. One of the most prominent concerns relates to authenticity. Traditional heritage paradigms associate authenticity with materiality and direct encounters with artifacts, whereas immersive experiences rely on simulation, reconstruction, and interpretation, thereby challenging established curatorial assumptions (Guttentag, 2010; Rickly-Boyd, 2013; Shim *et al*., 2024).

At the same time, immersive technologies are widely regarded as tools for expanding cultural access and participation, enabling organizations to reach broader and more diverse audiences by reducing physical, cognitive, and social barriers (Styliani *et al*., 2009; Bonacini *et al*., 2022; Trunfio *et al*., 2021). This dual role generates an inherent tension between accessibility and rigor, as efforts to simplify and engage may risk flattening the complexity of cultural narratives.

These dynamics unfold within a context characterized by multiple, and



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sometimes competing, institutional logics. Cultural organizations are required to simultaneously preserve heritage, educate audiences, and remain attractive within increasingly competitive and experience-driven markets. This convergence gives rise to well-documented tensions, including the balance between educational depth and entertainment value (Zollo *et al*., 2023; Trunfio *et al*., 2021), as well as the broader challenge of reconciling innovation with established institutional norms and expectations (Lucchi, 2025; Wang and Ametefe, 2025).

In this context, immersive cultural initiatives are increasingly shaped also by the need to combine heterogeneous competencies – ranging from technological development and historical expertise to storytelling and communication – while navigating evolving expectations from both institutional and public stakeholders (Battilana and Lee, 2014; Khaire, 2017). Understanding how these elements are brought together in practice is therefore central to advancing knowledge on digital cultural innovation.

## 3. Methodology

This study adopts a qualitative single-case study design to explore how an innovative cultural venture organizes and manages immersive technologies within a complex interplay of design practices, interdisciplinary collaboration, and institutional constraints. This methodological approach is particularly suitable for investigating contemporary, context-dependent phenomena characterized by multiple interacting dimensions and evolving organizational processes (Yin, 2014; Eisenhardt and Graebner, 2007). In line with recent calls for more context-sensitive and process-oriented research in digital innovation (Reinecke *et al*., 2016; Gummesson, 2017), the study aims to generate in-depth insights into how immersive cultural experiences are concretely developed and sustained in practice.

The empirical setting is represented by Cultura Immersiva, an Italian innovative start-up operating at the intersection of virtual reality, cultural heritage, and experiential design. The empirical setting is represented by Cultura Immersiva, an Italian innovative start-up that develops virtual reality solutions for cultural and tourism valorization. Founded in 2021 in Palma Campania through the collaboration between Stefano Rainone, CEO and computer engineer, and Andrea Carraro, Creative Director and playwright with over 50 years of theatrical experience, the company represents a particularly relevant case for exploring the organizational and interpretive processes through which immersive experiences are developed and implemented.

The study follows an interpretive qualitative approach aimed at



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understanding how different knowledge domains – technological, narrative-experiential, and cultural – are combined within organizational practices. Consistent with interpretive research traditions, the objective is not statistical generalization but the development of theoretically meaningful insights grounded in a rich empirical context (Cornelissen, 2017; Alvesson and Sandberg, 2013).

Data collection relies on a multi-source qualitative strategy. Primary data consist of two in-depth, semi-structured narrative interviews conducted with the two founders. The interviews were designed to explore key dimensions such as the origins and vision of the company, the role of immersive technologies in cultural experiences, audience engagement and accessibility, organizational challenges, and future developments.

These primary data were complemented by an extensive set of secondary materials, including company documents, project descriptions, institutional communications, media articles, and publicly available content related to the startup's activities. Rather than being treated as mere background information, these sources were used to contextualize and enrich the empirical understanding of the case, supporting a more nuanced interpretation of organizational practices over time.

The analytical process followed an abductive logic, characterized by an iterative movement between empirical material and theoretical concepts (Dubois and Gadde, 2002). This approach enabled the progressive refinement of interpretive categories, without relying on predefined hypotheses. The analysis focused on identifying recurring patterns and underlying mechanisms related to the integration of technological development, narrative-experiential design, and organizational coordination within immersive cultural projects.

The single-case study allows for an in-depth and holistic examination of a complex and still-evolving phenomenon, where technological innovation, cultural production, and institutional dynamics intersect. Such an approach is particularly appropriate in contexts where standardized models and consolidated managerial practices have not yet fully emerged, making exploratory and theory-building research especially valuable.

## 4. Findings

Cultura Immersiva is an Italian innovative technological start-up established with the aim of enhancing the country's cultural and tourist heritage through new technologies, with a specific focus on virtual reality. The initiative was supported in its early stages by regional public funding (Campania



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Startup 2020), which enabled the development of initial experiential prototypes, and was later recognized at the European level among the top 5 innovative projects in the field of cultural fruition.

From its early stages, the company positioned itself not simply as a technology provider, but as a partner for cultural communication, developing VR solutions such as interactive 3D reconstructions, immersive docu-films, virtual tours, and site-specific installations. These experiences are conceived to translate historical, artistic, and territorial content into accessible and engaging formats, often targeting audiences that are traditionally less involved in cultural consumption.

The operational model combines content production, technological implementation, and on-site event organization, allowing the company to directly manage the full experience cycle – from concept development to public delivery. This approach has enabled the diffusion of immersive initiatives across a wide range of contexts, including museums, schools, local events, and temporary installations, reaching audiences throughout the Italian territory. Public engagement is structured through modular sessions that ensure a continuous flow of visitors, often attracting family-based audiences and generating high levels of participation during weekend events.

Over time, the company has developed a portfolio of experiences spanning cultural heritage, art, and educational content. Notable examples include virtual reconstructions of archaeological sites such as ancient Pompeii, immersive reinterpretations of iconic artworks, and exploratory environments that combine scientific and narrative elements.

The cross-sector scalability of this operational model is validated by its expansion into commercial, performative, and socio-therapeutic settings documented across prominent regional and national media outlets. At its core, the venture is driven by a clear mission articulated by the CEO:

> "Cultura Immersiva was born from the idea of making cultural heritage more accessible, engaging, and emotionally memorable through immersive technologies. We identified a limitation in traditional forms of cultural consumption: content often appears static, distant from younger generations, and not very interactive. Our goal was to transform the visitor from a simple observer into an active participant".

This foundational orientation toward accessibility and experiential transformation underpins all subsequent strategic and design choices.



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### *4.1 Designing Immersion: Invisible Technology and Experiential Accessibility*

A first key finding concerns the way Cultura Immersiva conceptualizes and operationalizes immersive design. The empirical evidence shows that VR is not treated as a technological endpoint, but as a mediating infrastructure that must remain perceptually "invisible" while enabling deeper forms of cultural access.

Rainone explicitly emphasizes this principle: "The technology must remain invisible; it must serve the content, not become the focus of attention".

This design philosophy translates into a content-first development process in which storytelling, historical reconstruction, spatial sound, and narrative rhythm precede technical implementation. The immersive environment is therefore constructed as a coherent experiential system in which multiple sensory layers converge to produce emotional and cognitive engagement.

From Carraro's perspective, this process is even more deeply rooted in artistic and theatrical logics: "I always start from color, then I move to the word, and from the word to space".

This sequence reflects a dramaturgical approach to immersion, where meaning emerges progressively through aesthetic composition and spatialization. The immersive environment becomes analogous to a stage, where the user is not merely positioned in front of the artwork but is enveloped within a dynamically constructed sensory field. This explicit theatrical framing translates directly into practice through structural collaborations in staging contemporary performative arts, as evidenced by the firm's projects at the Teatro Ghirelli, where the traditional boundaries between acting, physical scenic spaces, and digital innovation are dissolved to turn artistic visions into lived user experiences (*la Repubblica*, 2023).

Importantly, this approach also enhances accessibility. By translating complex historical and cultural content into intuitive, sensorially rich experiences, immersive design reduces the cognitive and symbolic barriers traditionally associated with cultural institutions. As the engineer notes:

> "VR reduces the psychological distance between the individual and the cultural content. It is exceptionally effective at reaching younger demographics and students who typically avoid traditional museums. When they put on the headset, we see instant reactions of wonder and surprise, which immediately translates into prolonged attention spans and genuine curiosity".



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Accessibility here is not limited to physical reach (e.g., remote access or mobility constraints), but extends to interpretive accessibility-making culture understandable, emotionally resonant, and meaningful for diverse audiences, including those with limited prior cultural capital. Crucially, evidence from secondary sources integrated with the interview data shows that this inclusive mandate extends beyond standard educational activities into more advanced socio-therapeutic and digital health applications. In this context, the company has deployed immersive environments to enable heavily hospitalized pediatric patients, isolated by severe medical conditions, to temporarily overcome physical constraints and collectively experience high-profile real-time events (Medolla, 2022).

### *4.2 From Spectatorship to Co-Creation: User Interpretation, "Proposals" and Experiential Agency*

Building on this design logic, the findings reveal a transformation in the role of the user, who increasingly shifts from passive recipient to active interpreter and, in some cases, co-creator of the experience.

Rainone describes this transition clearly: "We wanted to allow people to 'enter' history… transforming them from simple observers into active participants".

This transformation is not only behavioral but also epistemological: users do not simply consume content, but actively construct meaning through interaction, exploration, and emotional engagement. The immersive environment fosters what can be interpreted as a situated and embodied form of cultural understanding.

Carraro's reflections add a crucial nuance to this process, highlighting both its potential and its limits. He notes that user reactions are often dominated by immediate emotional responses: "I would say that the main reaction is wonder, amazement. But if you ask whether this is followed by a deeper reasoning process leading to conclusions, not really-people tend to stop at that sense of wonder. Beyond that, however, in some cases a second phase emerges, where people start making proposals".

This observation highlights a key tension between immediate emotional engagement and deeper cognitive processing. While immersive experiences effectively capture attention through wonder, they do not automatically translate into reflective understanding; at the same time, they can, under certain conditions, trigger a more active and generative form of engagement, where users move beyond passive reception and begin to articulate ideas about the experience. These "proposals" represent an advanced stage of



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engagement, where users attempt to extend, reinterpret, or even reshape the experience itself. While many of these suggestions are technically unfeasible, their very emergence signals a shift toward participatory cultural consumption.

This dynamic introduces a productive tension. On the one hand, immersive experiences stimulate imagination and user agency; on the other, they generate expectations that cannot always be operationalized. Rather than being interpreted as a limitation, this gap can be understood as an indicator of deep engagement and cognitive activation.

At the same time, both founders acknowledge persistent challenges in interpretability. Carraro points out that immersive culture is often difficult to grasp in advance, while once users experience it, they tend to reinterpret and explain it in their own terms. This highlights a paradox: immersive experiences are intuitively powerful but conceptually difficult to communicate ex ante. The user journey therefore involves not only participation but also a process of sensemaking that unfolds during and after the experience.

### *4.3 Interdisciplinarity as a Generative Tension: Creativity, Technology, and Organizational Practice*

A third major finding concerns the deeply interdisciplinary nature of the venture and the organizational tensions it generates. Cultura Immersiva operates at the intersection of technological development, artistic creation, historical research, and experiential design, requiring the integration of heterogeneous competences.

This hybridity is embodied in the relationship between the two founders. Carraro reflects on this complementarity: “I am more ‘analogical’, Stefano is more ‘digital’. We respect each other’s worlds”.

He further emphasizes the generative nature of this difference, noting that ideas initially perceived as unrealistic from a creative standpoint are often translated into feasible solutions through technical expertise. This interplay between creative exploration and technical feasibility constitutes a core organizational mechanism. Innovation emerges not from linear processes, but from iterative negotiation between imagination and constraint.

Rainone, in turn, highlights the managerial complexity of orchestrating these diverse domains: “One of our greatest managerial challenges is navigating pure interdisciplinarity. Forcing technological innovation, absolute historical rigor, user-experience design, and financial sustainability to live under the same roof requires constant organizational adaptation. It is a continuous balancing act”.



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The findings suggest that interdisciplinarity is not simply a resource but a continuous source of friction that requires active management. Yet, it is precisely this friction that enables the development of novel experiential formats.

Carraro extends this argument to an intergenerational dimension: “From the combination of consolidated knowledge of older generations and the faster, more immediate knowledge of younger ones, only positive effects can emerge”.

This insight reframes interdisciplinarity as both cognitive and temporal, linking different epistemologies, professional cultures, and generational perspectives.

### *4.4 Authenticity, Institutional Frictions, and the Boundaries of Creative Freedom*

Another central theme concerns the tension between creative exploration and historical authenticity, particularly in relation to institutional expectations.

While immersive technologies allow for high degrees of imaginative reconstruction, both founders stress the importance of maintaining fidelity to historical sources. Rainone underlines the need to: “simplify highly complex, layered cultural narratives without diluting their historical rigor or academic validity”.

In this framework, immersive storytelling operates as a crucial cognitive mediator. By translating complex, abstract cultural knowledge into an intuitive, emotionally resonant sensory journey, the firm lowers the cognitive barriers to entry without falling into the trap of over-simplification.

This principle reflects an effort to balance accessibility with epistemic rigor.

The empirical material also points to concrete situations where this balance imposes constraints on creative freedom. As reported in the fieldwork, the team chose to abandon a 3D reconstruction project because certain visual elements, while narratively effective, could not be supported by historical evidence. This decision illustrates how authenticity operates as a boundary condition for immersive design.

Institutional relationships further complicate this balance. Early interactions with cultural stakeholders were characterized by skepticism, as VR was often perceived as overly playful or lacking seriousness. Over time, however, growing evidence of audience engagement has contributed to greater openness.



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Carraro captures the ambivalence of these dynamics: “Either people reject it completely, or, if they accept it, they become very open”.

This polarization suggests that immersive technologies do not simply integrate into existing cultural frameworks but actively challenge them, forcing institutions to renegotiate their assumptions about knowledge transmission and audience engagement. To overcome this structural friction and establish external institutional legitimacy, the firm relies heavily on building a collaborative ecosystem. Partnerships with schools, universities, municipal administrations, and traditional museum curators are utilized not just as distribution channels, but as vital mechanisms to co-develop content and secure cross-sector institutional backing. The definitive consolidation of this external institutional legitimacy is signaled by the start-up inclusion in highly conservative and authoritative spaces; its innovative projects have been prominently featured and endorsed within the official press organs of the Vatican at Piazza San Pietro, where the firm's immersive formats were legitimized as profound vehicles for universal humanistic and ethical messaging (*Piazza San Pietro Magazine*, 2026).

### *4.5 Between Predictive Adaptation and Human Unpredictability: The Ambivalent Role of AI and Speed*

The final set of findings concerns the future trajectory of immersive cultural experiences, particularly in relation to artificial intelligence and the broader acceleration of cultural consumption.

Rainone envisions a shift toward adaptive and personalized experiences:

> “We are witnessing a transition toward an entirely participatory, personalized, and adaptive model of cultural consumption. Integrated with VR and AR, Artificial Intelligence will radically transform how we learn and live cultural heritage, allowing us to create dynamic, responsive content in real time according to the user's feedback”.

According to the CEO, the convergence of AI and VR will fundamentally reconfigure heritage communication by shifting the paradigm from standardized group experiences to hyper-personalized, real-time cultural journeys. Rather than interacting with fixed narrative scripts, future immersive applications will dynamically adjust their educational depth, language, and sensory stimuli based on real-time user behavior.

Furthermore, the data indicates that this predictive shift is essential for overcoming contemporary market barriers, such as high initial setup costs



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and institutional resistance. By demonstrating that AI-driven immersive ecosystems can offer scalable, long-term educational impact rather than short-lived entertainment, the startup aims to redefine the financial and strategic viability of digital innovation for public administrations and private cultural entities alike. This strategic search for systemic scalability and financial viability is reflected in the venture's ability to mobilize large-scale institutional funding, such as the European Regional Development Fund (FESR), to deploy temporary digital heritage ecosystems directly inside unconventional, high-traffic mass commercial environments like the Renzo Piano-designed Vulcano Buono complex (*Il Meridiano*, 2022).

Carraro, however, introduces a more critical and reflective stance, expressing skepticism about the capacity of AI to capture the nuances of artistic experience. As he notes,

"AI is an algorithm… I struggle to believe it can deal with intuition, irony, or subtle variations".

ultimately positioning it as almost antithetical to the sense of wonder that characterizes cultural experience.

This contrast reveals a fundamental tension between predictability and unpredictability. While AI enables efficiency and adaptation, it risks reducing the open-ended, surprising, and interpretive nature of cultural engagement.

A similar ambivalence emerges around the role of speed. Carraro observes that contemporary cultural models are increasingly shaped by acceleration and time optimization, yet he simultaneously questions this trajectory, suggesting that technological advancement should also create space for slower, more reflective forms of engagement.

This reflection introduces an important counterpoint to dominant narratives of digital acceleration. Immersive technologies, while often associated with speed and innovation, may also enable moments of deeper engagement, contemplation, and "productive slowness".

Finally, Carraro highlights the fundamental unpredictability of human experience: "At the end of the day, everything is based on the human being, and the human being is not predictable".

This insight ultimately reframes the entire discussion: immersive cultural innovation cannot be fully engineered or anticipated, as it remains deeply entangled with human interpretation, emotion, and variability.



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## 5. Discussion

The empirical evidence analyzed in this study provides a process-oriented, socio-technical framework that shifts the analytical lens from what immersive technology is to how its underlying, multi-vocal organizational routines are balanced and institutionally legitimized (Reinecke *et al*., 2016; Wickert *et al*., 2021). While traditional quantitative and experimental research has heavily evaluated extended reality in heritage settings through isolated, hardware-centric user-testing metrics – such as tracking accuracy, interface usability, or immediate retention scores (Bekele *et al*., 2018; Radianti *et al*., 2020) – this qualitative inquiry unpacks the hidden socio-technical dynamics, intergenerational negotiations, and systemic paradoxes that characterize the long-term implementation of immersive creative media.

A first interpretive contribution concerns the reconceptualization of digital immersion as a situated process of experiential orchestration. Current management literature frequently frames immersion as an automatic byproduct of high hardware affordances, assuming that sensory vividness, field of view, or spatial interactivity mechanically trigger psychological presence (Slater and Sanchez-Vives, 2016; Riva *et al*., 2019). Our findings challenge this technological determinism, showing that within creative ecosystems, digital infrastructure must remain deliberately "invisible," serving as a transparent scaffold for narrative pacing. By integrating a dramaturgical sequence – where visual composition, text, and spatialization precede technical implementation – the case demonstrates that immersion is fundamentally an aesthetic and interpretive practice. This directly extends contemporary multidimensional models of experience design (Flavián *et al*., 2019; Buhalis *et al*., 2023), proving that digital value emerges when technology is subordinated to a content-first strategic logic, transforming virtual space into a dynamic interpretive arena. This dramaturgical realignment is empirically manifested in the integration of XR with analog performing arts (*la Repubblica*, 2023), proving that the design rules of successful virtual experiences borrow heavily from historical theatrical structures rather than pure software programming logics.

This content-driven architecture updates constructivist heritage communication and audience development theories (Styliani *et al*., 2009; Falk and Dierking, 2016; Bonacini *et al*., 2022). While previous studies primarily define VR accessibility in terms of overcoming physical, geographical, or mobility barriers (Bekele *et al*., 2018), this study suggests that its most significant organizational impact lies in dismantling cognitive and symbolic distance. By translating complex historical knowledge into intuitive and sensorially rich environments, immersive experiences make cultural content more



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approachable without requiring extensive prior knowledge. Meaning-making is therefore not delivered top-down by the institution; rather, it is co-created through the visitor's situated interaction within the virtual narrative. This reconfigures traditional, passive consumption models (Pine and Gilmore, 1999; Carù and Cova, 2007), transforming historical observation into agentic participation. At the same time, evidence from complementary secondary sources suggests that these experiences may extend beyond conventional cultural settings, for instance in initiatives involving vulnerable audiences, where immersive environments can temporarily alleviate physical and contextual constraints (Medolla, 2022).

However, our findings add a crucial nuance to experience economy frameworks by revealing that participation is not a fully controllable managerial process, but a generative dynamic that produces an "interpretive surplus". When users shift from spectators to active interpreters, their engagement often culminates in spontaneous, unsolicited "proposals" that exceed the technical and operational boundaries of the designed simulation. This indicates that digital co-creation inherently triggers an imaginative overflow. Rather than viewing this gap between user expectation and technical feasibility as an operational failure, it must be theorized as a clear indicator of deep cognitive activation, requiring organizations to develop selective filtering mechanisms to manage participatory boundaries.

Furthermore, this study contributes to the literature on hybrid organizational forms and cultural entrepreneurship (Battilana and Lee, 2014; Khaire, 2017) by mapping how digital ventures navigate the competing institutional logics of preservation, rigor, and commercial entertainment (Guttentag, 2010; Rickly-Boyd, 2013). Prior research often conceptualizes the introduction of digital simulation as an unresolvable paradox where innovation inherently dilutes historical authenticity (Champion, 2021; Trunfio *et al*., 2021). Our qualitative inquiry reframes this tension, demonstrating that authenticity is a situated organizational practice constructed through iterative ethical boundaries. The decision to abandon digital reconstructions when visual components lack empirical backing proves that authenticity operates as a strict boundary condition. The apparent friction between education and entertainment is bridged by deploying emotional engagement instrumentally as an attentional anchor to capture diverse demographics, securing external institutional legitimacy through a collaborative ecosystem of universities, schools, and traditional curators. Evidence from secondary sources further shows how these immersive formats are implemented not only within museums and heritage sites, but also in more accessible public and commercial environments, broadening audience reach, while simultaneously gaining recognition within traditionally conservative institutional settings (*Il*



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*Meridiano*, 2022; *Piazza San Pietro Magazine*, 2026). This suggests that legitimacy is strengthened when technology is aligned with cultural values rather than treated as a mere novelty. This hybridity is internally sustained by an ongoing, generative friction between divergent professional epistemologies. The continuous negotiation between "analog" artistic direction and "digital" software engineering represents an essential creative mechanism where innovation emerges from the productive clash between imagination and technical constraint. By incorporating an intergenerational dimension - linking consolidated traditional expertise with rapid, digital-native cognitive models – the study reframes organizational interdisciplinarity as a temporal and cognitive resource that prevents both academic insularity and shallow technological consumerism.

Finally, the findings challenge linear assumptions regarding digital acceleration and environmental volatility within smart tourism and metaverse domains (Flavián *et al*., 2019; Dwivedi *et al*., 2022). While digital transformations are commonly associated with velocity, immediacy, and automated personalization, the case uncovers a deeply ambivalent socio-technical future. The strategic push toward algorithmic, AI-driven real-time adaptation stands in direct tension with the core human properties of the cultural experience, such as intuition, irony, and wonder. While predictive algorithms aim to standardize or certify the user journey, true cultural immersion relies on open-ended surprise and unpredictable human interpretation. This duality foregrounds the epistemic limits of algorithmic mediation in creative contexts. Immersive environments thus emerge as relational spaces where technological acceleration must coexist with moments of deliberate slowing down, allowing users time for reflection, interpretation, and emotional processing. In this sense, long-term strategic viability depends on the organization's ability to preserve these spaces for open-ended, non-linear engagement alongside rapid technological development.

## 6. Theoretical, managerial, and methodological implications

### *6.1 Theoretical Implications*

This study contributes to ongoing debates on immersive technologies by shifting the analytical focus from technological affordances to the organizational and interpretive processes through which immersive cultural experiences are developed and sustained. While recent literature on XR, metaverse environments, and digital experiences conceptualizes immersion as a multidimensional construct encompassing sensory, cognitive, emotional, and



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social dimensions (Flavián *et al*., 2019; Dwivedi *et al*., 2022; Buhalis *et al*., 2023), the findings show that these dimensions do not emerge automatically from technological infrastructures. Rather, they are actively produced through situated design practices, narrative configurations, and organizational coordination.

A first contribution lies in advancing the understanding of immersion as a structurally constructed experiential process. Prior studies have largely emphasized presence, interactivity, and technological intensity as key drivers of immersive engagement (Slater and Sanchez-Vives, 2016; Riva *et al*., 2019). This study instead highlights how immersive value depends on the alignment between narrative development, spatial composition, emotional pacing, and user involvement. In this sense, technology operates less as a driver of experience and more as an enabling layer whose effectiveness depends on its integration within a broader experiential architecture. This perspective enriches research on experience design and digital experience ecosystems (Lemon and Verhoef, 2016; Flavián *et al*., 2019) by emphasizing the organizational work required to produce coherence across heterogeneous experiential elements.

Second, the study contributes to the literature on meaning-making in immersive environments by clarifying the role of narrative mediation. While previous research has questioned whether immersion necessarily leads to deeper understanding (Bekele *et al*., 2018; Champion, 2021), the findings indicate that comprehension emerges through interpretive structures that guide user attention and frame the experience. Immersive storytelling thus functions as a translation mechanism between expert knowledge and user experience, extending constructivist perspectives on sensemaking and cultural interpretation (Falk and Dierking, 2016; Maitlis and Christianson, 2014).

Third, the findings refine existing debates on authenticity in digital heritage contexts. Rather than treating authenticity as a fixed attribute anchored in materiality, the study conceptualizes it as a negotiated and practice-based outcome shaped through ongoing design decisions and institutional interactions. This aligns with relational and constructivist interpretations of authenticity (Rickly-Boyd, 2013), while showing how organizations establish boundaries to preserve historical credibility without renouncing experiential engagement.

Fourth, the study contributes to research on cultural consumption and audience participation by highlighting the generative nature of user involvement in immersive environments. Participation is not limited to predefined interaction patterns but often produces emergent interpretations and expectations that extend beyond the designed experience. This suggests that



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immersive environments activate forms of engagement that are only partially controllable, calling for a reconceptualization of co-creation as an open-ended and bounded process.

Finally, the study extends the literature on digital innovation and socio-technical change by addressing the evolving role of Artificial Intelligence in immersive environments. While existing research emphasizes personalization and real-time adaptation (Dwivedi *et al*., 2022), the findings reveal a tension between algorithmic predictability and the inherently open-ended nature of cultural experience. This highlights the need to conceptualize immersive systems as dynamic configurations in which technological advancement must be continuously balanced with the preservation of interpretive openness and human agency.

## *6.2 Managerial Implications*

The findings of this study offer several practical insights for practitioners operating in cultural institutions, creative industries, and digital innovation contexts, highlighting first and foremost that immersive technologies should be approached as strategic tools for cultural communication rather than as standalone technological solutions. Because the ultimate effectiveness of virtual reality experiences depends heavily on their deep integration with storytelling, emotional design, and user-centered interaction, organizations investing in these digital environments must prioritize narrative coherence and experiential quality over technological sophistication alone. To achieve this, it is critical that the underlying hardware remains strategically secondary to the cultural content, serving as an invisible vehicle for meaning-making rather than a short-lived attraction.

In operational terms, the results emphasize the absolute importance of developing robust interdisciplinary capabilities. Constructing immersive cultural experiences requires the continuous coordination of deeply diverse and often conflicting competencies, including technological expertise, cultural knowledge, storytelling, and experience design. This operational complexity suggests that organizations should move past traditional functional silos and adopt collaborative, cross-functional approaches, while actively investing in systematic skill development and cross-sector partnerships to manage the internal frictions typical of hybrid socio-technical ventures.

This interdisciplinary integration becomes particularly powerful when addressing accessibility and audience development strategies. Immersive technologies can support the concrete engagement of new and previously underrepresented audiences, reducing both the cognitive and symbolic



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distance that often alienates younger generations and less frequent visitors from traditional spaces. By leveraging immersive experiences, cultural organizations can effectively broaden participation, enhance social inclusivity, and foster prolonged, post-experience engagement and curious learning long after the digital simulation has concluded.

At the same time, the findings underline the crucial managerial requirement of actively balancing the persistent tensions between authenticity, innovation, and entertainment. Cultural organizations adopting immersive applications need to maintain a careful and constant equilibrium between preserving absolute academic or historical rigor and enhancing emotional engagement. Navigating this "edutainment" paradox successfully requires not only sophisticated design capabilities but also effective communication and relational strategies to legitimize immersive approaches among conservative institutional stakeholders, positioning emotional entertainment instrumentally as an attentional anchor rather than a commercial end.

Finally, managing these strategic dimensions demands that practitioners address environmental volatility by designing digital portfolios with long-term adaptability and scalability in mind. To counter high initial adoption costs and rapid technological obsolescence, managers must prepare their organizational frameworks for the upcoming integration of Artificial Intelligence. Transitioning from static, pre-programmed virtual assets toward hyper-personalized, adaptive environments that respond to user behavior in real time allows ventures to realign creative practices with shifting technological frontiers. By focusing on dynamic, AI-driven socio-technical systems, managers can secure long-term cross-sector backing and deliver a sustainable educational impact that justifies the initial capital investment for both public and private stakeholders.

## *6.3 Methodological Implications*

Our study offers critical contributions directly relevant to the debate on the exploratory power of qualitative inquiry in management research. First, it demonstrates how a single-case design functions as an epistemological probe capable of unpacking non-linear, multi-level processes that quantitative metrics systematically flattens (Yin, 2014; Eisenhardt and Graebner, 2007). While quantitative surveys can effectively measure the outcomes of digital immersion (e.g., user satisfaction or perceived usefulness), they remain blind to the micro-foundations of experience orchestration – such as the relational tensions between technical engineers and artistic directors during the design phase.



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Second, by adopting an abductive iterative logic, this research challenges the rigid boundaries of deductive theory-testing. The single-case design allowed us to confront empirical surprises – such as initial institutional resistance from heritage curators – and use them to refine institutional logic theories in real-time. This confirms that the case method is not merely a descriptive tool, but a highly generative approach for context-sensitive theory building in fast-paced, high-density innovative ecosystems (Dubois and Gadde, 2002; Cornelissen, 2017).

Third, the study demonstrates the importance of designing interviews that are not merely descriptive but explicitly oriented toward uncovering mechanisms, processes, and managerial logics. The semi-structured interview used in this research enabled the reconstruction of strategic decisions, experiential design practices, and organizational challenges, thereby generating rich and analytically relevant data. This approach aligns with calls for greater rigor and reflexivity in qualitative research design (Alvesson and Sandberg, 2013).

Fourth, the case highlights the importance of integrating multiple levels of analysis within qualitative research. The findings simultaneously address micro-level experiential dynamics (user engagement), meso-level organizational processes (capabilities and design practices), and macro-level institutional dynamics (legitimacy and adoption of immersive technologies). This multi-level perspective strengthens the explanatory power of case study research and enhances its contribution to theory building.

Finally, the study provides an example of how single-case research can contribute to broader theoretical debates when the case is selected for its revelatory and exploratory potential. Rather than aiming for statistical generalization, the research demonstrates analytical generalization by identifying mechanisms and conceptual patterns that may be transferable to similar contexts (Yin, 2014). This reinforces the legitimacy of case study methodology as a rigorous and valuable approach for advancing management research, particularly in contexts characterized by innovation, complexity, and rapid change.

## 7. Conclusions, Limitations, and Future Research

This study has investigated how innovative cultural ventures operationally orchestrate immersive technologies to drive cultural heritage valorization while navigating interdisciplinary frictions and institutional legitimacy demands. By unpacking the single case of Cultura Immersiva, this paper moves past hardware-centric views of digital simulation. Instead, the empirical evidence frames these digital interventions as complex socio-technical



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phenomena where technological features must remain secondary and hidden behind a rigorous narrative infrastructure. Immersive storytelling serves as a vital cognitive scaffold that translates abstract historical knowledge into highly intuitive, emotionally resonant user experiences. This operational alignment successfully lowers both cognitive and symbolic barriers to entry for younger generations and historically alienated visitors, shifting the paradigm of cultural consumption from static observation toward agentic, participatory co-creation.

Furthermore, this qualitative inquiry reveals that digital cultural entrepreneurship requires managing deep internal and external systemic tensions. Forcing tech engineers, historical experts, and artistic directors to collaborate introduces permanent organizational frictions that demand continuous relational coordination and cross-functional hybridity. Externally, the persistent friction between preservation, material authenticity, and entertainment is mitigated by utilizing emotional engagement strictly as an attentional anchor rather than a commercial end, securing cross-sector institutional backing through collaborative multi-actor ecosystems. Finally, the empirical data highlights an evolutionary transition where the convergence of Artificial Intelligence and extended reality redefines the viability of these projects. By moving from static, pre-programmed installations toward adaptive systems capable of personalization based on real-time feedback, digital ventures develop the dynamic capabilities needed to withstand rapid technological obsolescence and high initial market barriers.

Despite these insights, several boundaries condition the empirical scope of this investigation. Because the qualitative framework relies on a single-case design within the Italian creative industry, the analytical generalization of the findings to different geographical or regulatory settings remains constrained. The specific reliance on public-private partnerships and local municipal support observed in this context might reflect regional institutional architectures that do not directly translate to different national cultural regimes. Additionally, while the primary narrative interview with the co-founders was systematically triangulated with an extensive corpus of archival data, the findings inevitably prioritize a strategic, founder-centric perspective. This perspective limits the direct inclusion of employee-level dynamics or real-time visitor behaviors. Lastly, since the startup's operational shift toward adaptive, AI-driven media models represents a recent and still unfolding phenomenon, tracking the long-term economic performance and institutional stabilization of this technological convergence was beyond the temporal reach of this inquiry.

These boundaries offer fruitful pathways for expanding the conversation within future creative industries and management research. Scholars are



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encouraged to implement comparative multiple-case designs across contrasting national settings to examine how divergent public funding mechanisms and curatorial traditions shape the negotiation of institutional logics. There is also an urgent need to empirically explore the workflow reconfigurations triggered by the integration of Artificial Intelligence in digital curation. Investigating how multidisciplinary teams preserve historical accuracy and curatorial authority when automated algorithms dynamically alter sensory stimuli based on visitor tracking will significantly advance experience ecosystem theories. Finally, future qualitative designs should explicitly incorporate a multi-stakeholder lens by gathering primary data from traditional museum curators, public administrators, and final users simultaneously. Such multi-level field studies will provide a balanced understanding of how value, credibility, and socio-cultural accessibility are continuously co-created and legitimized within evolving socio-technical assemblages.

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# Bibliometric Analysis of Global University Entrepreneurial Spirit Students' Survey (GUESSS): The State of the Art, Theoretical Insights and Future Directions

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**Abstract**

Research on youth entrepreneurship offers unique contributions to our understanding of how different contexts affect the unfolding of nascent and active entrepreneurs. This study conducts a bibliometric review and thematic content analysis of academic studies investigating student entrepreneurship based on the "Global University Entrepreneurial Spirit Students' Survey" (GUESSS) project. To the best of our knowledge, no bibliometric or systematic review has been conducted to date reflecting on the evolution of existing GUESSS work. We fill this gap by analysing 117 articles using bibliometric techniques to delineate the conceptual, intellectual, and social structure of the GUESSS scholarship, supplementing it with the tenets of a structured systematic review. We identify six thematic clusters and foundational theories that shaped the theoretical developments within our study pool. We outline theoretical implications and provide cluster and cross-cluster limitations. We develop a future research agenda bridging GUESSS with the broader research on small business and entrepreneurship.

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*Keywords:* GUESSS; Bibliometric analysis; Student Entrepreneurship; New Ventures; Entrepreneurial intentions; Entrepreneurial education

*Analisi bibliometrica della Global University Entrepreneurial Spirit Students' Survey (GUESSS): stato dell'arte, approfondimenti teorici e direzioni future della ricerca*

**Sommario**

La ricerca sull'imprenditorialità giovanile offre spunti unici alla comprensione di come i diversi contesti influenzino lo sviluppo di imprenditori attivi e nascenti. Il presente studio conduce una revisione bibliometrica e un'analisi tematica dei contenuti degli studi accademici che indagano l'imprenditorialità studentesca basandosi sul progetto "Global University Entrepreneurial Spirit Students' Survey" (GUESSS). Allo stato attuale delle conoscenze, non è stata condotta alcuna revisione bibliometrica o sistematica che rifletta sull'evoluzione del lavoro esistente relativo al progetto GUESSS. Lo studio colma questa lacuna analizzando 117 articoli attraverso tecniche bibliometriche per delineare la struttura concettuale, intellettuale e sociale della produzione scientifica GUESSS, integrandola con i principi di una revisione sistematica strutturata. Vengono identificati sei cluster tematici e le teorie fondanti che hanno plasmato gli sviluppi teorici all'interno del campione di studio. Sono inoltre delineate le implicazioni teoriche e forniti i limiti relative alle analisi a livello di cluster e inter-cluster. Infine, lo studio sviluppa un'agenda di ricerca futura che collega il progetto GUESSS con la più ampia ricerca sulle piccole imprese e sull'imprenditorialità.

*Keywords:* GUESSS; Analisi bibliometrica; Imprenditorialità studentesca; Nuove imprese; Intenzione imprenditoriale; Educazione imprenditoriale

## 1. Introduction

The concept of student entrepreneurship, which can be defined as the venture creation activities of students and recent graduates (Bergmann *et al.*, 2016), has been a subject of considerable interest among scholars specialising in entrepreneurship (Hahn *et al.*, 2021). This interest stems from the recognised economic impact of student ventures (Åstebro *et al.*, 2012) and their vital role in knowledge transfer from universities to markets (Meoli *et al.*, 2020). Beyond that, entrepreneurs and their creative abilities are considered a crucial resource that contributes to the sustainability transition in society (Rosário and Figueiredo, 2024), as they play a key role in shaping opportunities, navigating uncertainty, and transforming institutional frameworks (Sarasvathy, 2004). Therefore, given the considerable influence that student



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entrepreneurs exert on strategic management and the performance of their ventures, it is critical to develop a comprehensive understanding of the evolution of the student entrepreneurship research stream to advance both scholarship and practice. Furthermore, the post-pandemic landscape has renewed scholarly interest in this phenomenon, as student entrepreneurs are increasingly recognized as key agents of resilience and digital transformation in a rapidly changing global economy.

Besides its association with economic growth, the interest in student entrepreneurship has recently been reinforced by the recognition that the study of this phenomenon can generate broader contributions to the entrepreneurship literature (Clarysse *et al.*, 2022). For example, it can increase our knowledge of how a predisposition for, and interest in, entrepreneurial careers are formed, given the particular stage of students' lives (Shirokova *et al.*, 2016). Moreover, the embeddedness of students in the university and family contexts (Hahn *et al.*, 2020) provide a unique opportunity to understand how relevant others and contextual conditions facilitate entrepreneurial entry (Meoli *et al.*, 2020). For these reasons, research on student entrepreneurship can offer unique contributions to our understanding of how context affects the unfolding of nascent and active entrepreneurship processes, for example in terms of networking (Kaandorp *et al.*, 2020), founder decision-making (Braun and Sieger, 2021) and the enhancement of young women's entrepreneurship (Weiss *et al.*, 2023).

The Global University Entrepreneurial Spirit Students' Survey (GUESSS) established in 2003 is the largest global research project on student entrepreneurship. The main goal of GUESSS is to capture trends and generate novel insights into student entrepreneurship through collecting data in various countries globally every 2-3 years, which allows detailed cross-country comparisons and within-country analyses in both cross-sectional and longitudinal analyses. More specifically, the GUESSS community investigates and compares entrepreneurial activities, and the antecedents and outcomes of university students worldwide, publishing research articles and reports (Sieger *et al.*, 2021; 2024). The latest wave of GUESSS included more than 226,000 students from 57 different countries (Sieger *et al.*, 2024). The inclusion of a diverse range of universities and countries ensures a multifaceted research approach, facilitating the identification of contextual factors that influence the phenomenon of student entrepreneurship (Bergmann *et al.*, 2016). The GUESSS survey is grounded in the utilisation of validated scales, with several of these encompassing emergent themes within the entrepreneurship literature. These themes include founders' micro-foundations, such as their social identity (Karpinskaia *et al.*, 2025; Sieger *et al.*, 2016), Dark Triad founder personality traits (Shirokova *et al.*, 2024) and founders' affective



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commitment (Dawson *et al.*, 2014). At the meso level of a firm, the studies in our pool examine innovation ambidexterity strategy (He and Wong, 2004) and the causal and effectual decision-making logics of new ventures (Braun and Sieger, 2021; Smolka *et al.*, 2018). This renders the dataset particularly valuable in investigating specific questions concerning student entrepreneurship antecedents, processes and outcomes, which would be impossible to answer with archival data, such as decision-making or well-being (Braun and Sieger, 2021; Hahn, 2020).

This study provides a comprehensive bibliographic overview of the GUESSS scholarship between 2003 and 2024. To ensure a robust review, we designed a hybrid methodology that supplemented a bibliometric review with the tenets of a structured systematic review (Paul and Criado, 2020). Although various concepts and constructs have been introduced to the entrepreneurship literature to explore and explain student entrepreneurship dynamics at individual, family, university and contextual levels, to the best of the authors' knowledge, no systematic review has been conducted to date that has examined the existing work and reflected on how the GUESSS scholarship has evolved and been shaped to date. Our work seeks to fill this gap by conducting a rigorous review of academic studies generated by the GUESSS scholarship to date. We address three research questions in our study:

*RQ1: What intellectual structure and pattern of publications exist in the GUESSS research in terms of the performance (top journals, most prolific contributors and institutions)?*

*RQ2: What social structure and conceptual composition exist in the GUESSS research in terms of the core themes, critical concepts and theories?*

*RQ3: How can the extant GUESSS research on student entrepreneurship be advanced?*

To answer our research questions, we analysed 117 scientific GUESSS articles that were published between 2003 and 2024. Utilising bibliometric techniques in accordance with the recent methodological standards (Lampe *et al.*, 2020), we conducted a performance analysis and science mapping. There is a broad consensus that bibliometric review is the most appropriate combination of methodological approaches to achieve this aim (Mukherjee *et al.*, 2022). In line with recent bibliometric analyses in top entrepreneurship journals (Lampe *et al.*, 2020; Forliano *et al.*, 2021), we then manually analysed the contents of each article to identify and discuss in more detail the thematic clusters that emerged from the bibliometric analysis. The structured component of our review aimed at unpacking theories, and enabled us to identify theoretical lenses, concepts and emerging theories in six clusters, that have been used by the GUESSS scholarship to date (Paul and Criado, 2020).



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The remainder of this paper is structured as follows: we first elaborate on the review methodology and the results of the bibliographic data collection and extraction followed by the results of the bibliometric analysis and science mapping. The latter allowed us to identify the social and conceptual structure as well as the intellectual structure of the studies in our pool. Six clusters were obtained performing a Bibliographic Coupling Analysis with VOSviewer. Each cluster was then manually analysed to unpack theories and concepts that have shaped the GUESSS scholarship to date. Results presentation is finally followed by the discussion and conclusion section, outlining detailed limitations within and across clusters, and the future research agenda.

## 2. Methodology

Bibliometrics was introduced by Pritchard in 1969 as a method that applies statistical tools to analyse bibliographic data (Pritchard, 1969). This approach tends to be more objective and extensive in scope than other types of reviews particularly in terms of objectivity and breadth, and the ability to identify patterns and trends within large datasets (Fan *et al.*, 2022).

The use of this methodology is widespread in the field of entrepreneurship (Lampe *et al.*, 2020) and it has been used to analyse the body of scientific works based on entrepreneurship datasets, such as the Global Entrepreneurship Monitor (GEM) (Álvarez *et al.*, 2014). For these reasons, the bibliometric method was deemed suitable to achieve our research goal. Following the guidelines in applying bibliometric methods (Mukherjee *et al.*, 2022) and inspired by other bibliometrics research (Forliano *et al.*, 2021), we followed a two-step review approach for our bibliometric analysis (bibliometric performance analysis and science mapping analysis) followed by a thematic content analysis. To ensure a robust review, we designed a hybrid methodology that supplemented a bibliometric review with the tenets of a structured systematic review (Paul and Criado, 2020). In addition to conducting a bibliometric review, we addressed the aspect of 'What' (Callahan, 2014) knowledge emerged about the phenomenon of student entrepreneurship. This corresponds to the 'Theory development' (T) aspect in established frameworks for conducting SLRs (Paul and Criado, 2020). Applying a hybrid methodology enabled the development of more comprehensive and in-depth review (Paul and Barari, 2022). The theory development' (T) aspect was used to unpack the fundamental theories employed by GUESSS scholars (cfr. Table A2 in Appendix A). Previous studies have applied a similar methodology by integrating bibliometric and structured reviews (Bahoo *et al.*, 2020).



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## *2.1 Bibliographic Data Collection and Extraction*

As for the choice of the bibliographic database from which to extract the necessary data for the purposes of our analysis, we chose to use the articles registered in Scopus, given the extensiveness of the database (in comparison to Clarivate Analytics' Web of Science) and that it provides the necessary treatability of the meta-data of each contribution (in comparison to Google Scholar) (Adriaanse and Rensleigh, 2011). For the construction of our bibliographic sample, to ensure the comprehensiveness of our research strategy, we followed a step-by-step procedure, starting with the publications found on the official GUESSS website[1]. On the day of the analysis (April 11th, 2024) the survey's website included 80 references, of which only 78 were recorded in Scopus and as such exportable in a compatible bibliographic format, and only 76 of which were indexed including the necessary meta-data of each contribution. We also decided to exclude papers written in languages other than English to maintain a consistent review process, as such excluding 2 more works, rounding up the total number of articles obtained from the survey's website to 74. We then carried out, in the second step, a confirmatory search directly in Scopus, via the search query in Table C1 in Appendix C.

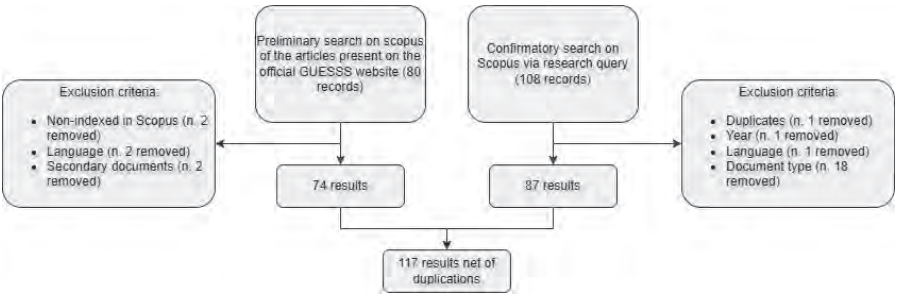
Dealing with the publications' selection criteria, given the high level of specificity of our research objective, we decided to restrict the Scopus search strategy to journal articles only. In this way, as in Guillén *et al.* (2022), it was possible to ensure that our sample included only contributions that had undergone the double-blind review process required by academic journals. Regarding the timeframe, given that the Global University Entrepreneurial Spirit Students' Survey was established in 2003[2], we deemed it appropriate to include only studies published from the year 2000 onwards. As before, we also decided to exclude papers written in languages other than English. Following Scopus' syntax, the search with the abovementioned query on the database was performed in the title, abstract, and keywords (authors keywords + index keywords) fields (string TITLE-ABS-KEY), in line with prior bibliometric reviews (e.g., Pisani *et al.*, 2017), applying the aforementioned restrictions, resulting in 83 records. In the third step, we compared the two lists obtained via the survey's website (74 references) and through a direct search on Scopus (108 references) removing duplicates, obtaining a final sample of 117 references (cfr. Appendix B). Fig. 1 summarises the different phases of our research strategy.

[1] https://www.guesssurvey.org/publications/publications/academic-journals.html
[2] https://www.guesssurvey.org/keyfacts/



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*Fig. 1: The different phases of the data extraction activity*




*Source: Authors' elaboration on search and selection process data.*

The sample of papers resulting from the database search and selection process was then analysed using primarily two techniques: performance analysis and science mapping (Noyons *et al.*, 1999).

In this review, we employed both quantitative and qualitative indicators to evaluate the performance, in terms of productivity and impact, of researchers, institutions, countries, articles, and journals. Quantitative indicators, which measure productivity, allowed us to identify the most prolific contributors, institutions, and journals based on research output and citation counts (Kraus *et al.*, 2022). On the qualitative side, we assessed the scientific impact by highlighting the most influential papers, measured through normalised citation counts, which provide a more balanced comparison across different research outputs (Bornmann *et al.*, 2013). This dual approach offered an objective overview of both research productivity and the broader impact of the contributions within the GUESSS research domain. In addition to the performance analysis, we utilised scientific mapping techniques, a common method in bibliometric analysis, to uncover latent patterns in the conceptual, social, and intellectual structures of the literature over time (Börner *et al.*, 2003). The conceptual structure refers to the relationships between key concepts or terms in the literature. To analyse this, we focused on the co-occurrence of authors' keywords, which serve as a reflection of the core content of their studies. The social structure analysis, meanwhile, explored the connections between various actors, such as authors, institutions, or countries, revealing collaborative networks. Finally, the intellectual structure analysis examined the relationships among documents, authors, and journals, which helped trace the evolution of ideas and contributions within the field. This methodology is grounded in extensive bibliometric research that underscores the value of performance analysis and science mapping across a wide range of academic disciplines (Cobo *et al.*, 2011). The scientific mapping relied on



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the 1.6.20 version of VOSviewer (van Eck and Waltman, 2010), a free, open-source similarity visualisation software for overlaying and visualising sets of bibliographic data (such as journal article authors, co-authors, and citation networks), in order to unveil their hidden structures and relations.

### *2.2 Performance Analysis*

Performance analysis uses indicators related to publication trends and citation counts, sorted by authors, journals, countries and affiliations, to compare the productivity and impact of different actors in a field (Massaro *et al.*, 2016).

### *2.3 Science Mapping*

Science mapping is a powerful, graph-based technique for analysing and presenting the relationships between different scientific topics. Through science mapping, researchers can gain valuable insights into the structure and development of scientific fields, identify key research trends and emerging areas of interest, and explore the connections between authors and different areas of research (i.e., a field's *conceptual, social and intellectual structures*) (Cobo *et al.*, 2011). In particular, a field's social structure can be captured through a co-authorship analysis (Peters and van Raan, 1991), which enables the visualisation of the links between authors, the calculation of the number of co-authored documents, the quantification of the number of co-authors, and the calculation of the average number of co-authors of an author. As such, by examining patterns of collaboration and authorship, it is possible to identify key researchers, institutions, or research groups as well as central authors and collaboration patterns in addition to supporting the definition of thematic clusters. To uncover a field's conceptual structure, methods such as Keyword Co-occurrence Analysis (KCA), text mining, or topic modelling (e.g., Latent Dirichlet Allocation) can be used to identify prevalent concepts, themes, or trends in the literature by examining the content of research outputs, focusing on keywords, abstracts, or full-text documents. Finally, the intellectual structure of a field can be described, among others, through *bibliographic coupling* (Kessler, 1963), which involves studying the references used together in different documents to identify common topics and patterns in the literature. This type of analysis can be used to identify gaps or potential avenues in the field, understand the relationships between publications, research themes, or methodologies, and reveal clusters of related research and the evolution of research topics over time (Jarneving, 2007).



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## 3. Results of the Bibliometric Analysis

### *3.1 Performance Analysis*

This section presents a bibliometric analysis based on different performance indicators typically used in bibliometric reviews (Durieux and Gevenois, 2010). The analysed performance indicators are the following: i) publication activity in terms of publications per year; ii) productivity by country and by affiliation; iii) publication activity in terms of most prolific authors; iv) productivity in terms of most prolific journals; v) the top journals in terms of global citations; vi) the top journals by impact factor and ranking; and, vii) the top articles by number of citations. The output of the database search and selection process consisted of a sample of 117 publications by 246 authors affiliated with 143 institutions in 40 countries, published in 68 journals, and referred to 8457 cited references (Table C2 in Appendix C).

#### *3.1.1 Articles' Evolution over Time*

The analysis of the number of publications over time (Figure 2) shows an increasing trend, suggesting a growing utilisation of the GUESSS dataset by the academic community. The cyclical pattern of publications with peaks and valleys across years can be explained by the wave-based nature of the survey (cfr. Table C3 in Appendix C). It can be observed, indeed, that the number of papers in the GUESSS sample has increased over time, with the 2011 and 2018 GUESSS waves having the highest number of papers. This could be indicative of the growing interest among scholars in student entrepreneurship research in recent years. In addition, the considerable presence of works employing longitudinal data suggests an interest among the scholarly community in examining multiple time periods by exploiting data from multiple GUESSS waves.

Table C4 in Appendix C ranks the 15 most influential papers in the sample by normalised citations (average citations per year since publication), covering topics such as entrepreneurship education, the intention-action link, family support in start-up activities, and the entrepreneurial climate at universities, and spanning journals including Technological Forecasting and Social Change, Research Policy, the Journal of Small Business Management, Small Business Economics and European Management Journal. Most papers date from 2016-2022, though a few more recent (2023-2024) publications have already accumulated substantial citations, pointing to the growing impact of GUESSS scholarship.



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*Fig. 2: Distribution of publications over time*




*Source: Authors' elaboration on SCOPUS data.*

### 3.1.2 Articles' Geography

According to Table C5 in Appendix C, the most prolific country in terms of publication activity is the Russian Federation, followed closely by the United States of America and Germany, Italy, Spain and Switzerland. Other countries with high publication activity include Colombia, France and the Netherlands.

Table C6 in Appendix C provides information on the top 15 institutions in terms of publication activity. The Graduate School of Management of St. Petersburg State University is the most prolific institution, followed by Università degli studi di Bergamo. Other highly productive institutions include the University of St. Gallen and Rotterdam School of Management Erasmus University.

### 3.1.3 Authors

Table C7 in Appendix C lists the top 15 authors in terms of publication activity related to the Global University Entrepreneurial Spirit Students' Survey. The most prolific author is Shirokova, G., who has published 19 papers



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based on the survey. The second most prolific author is Minola, T., with 10 papers. Other authors with a high number of publications include Sieger, P., Bogatyreva, K., Edelman, L.F., Gubik, A.S., Hahn, D., Leiva, J.C., and others. These authors have made significant use of the GUESSS survey in order to contribute to research on student entrepreneurship.

#### 3.1.4 Journals

Tables C8-C10 in Appendix C rank the top 15 journals by publication activity, by global citations of GUESSS-based articles, and by impact factor and ranking (H-INDEX, SJR, ABS/AJG) respectively, together mapping the most active, most influential and most prestigious outlets for GUESSS scholarship (Vanclay, 2012; Bar-Ilan, 2008).

The main takeaways from this performance analysis are the following: i) the most prolific authors are the delegates of the GUESSS survey, especially in Russia and Italy. This could be a proxy for the fact that the community of GUESSS is a "closed community" since the availability of national data is restricted to delegate committees. Based on this, our review could be an incentive to rethink the access to the GUESSS dataset similarly to other datasets on entrepreneurship (e.g. GEM), contributing in a more efficient way to datasets designed to capture entrepreneurial dynamics (Acs *et al.*, 2008); ii) regarding the journals, to the contrary to other unconventional entrepreneurship forms (such as immigrant entrepreneurship), student entrepreneurship appears to be of interest mainly to entrepreneurship journals (Aliaga-Isla and Rialp, 2013). In addition, Small Business Economics looks an ideal outlet for researchers interested in this topic since it publishes research addressing all aspects of entrepreneurship with a special emphasis on the economic and societal relevance of research findings for scholars, practitioners and policy makers.

### *3.2 Science Mapping*

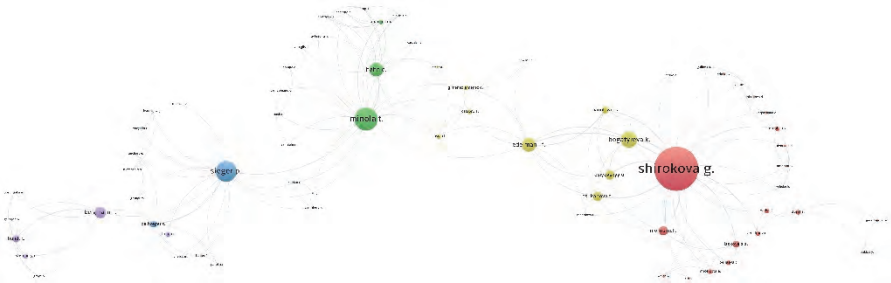
#### 3.2.1 Social and Conceptual Structure

Based on the conceptualisations presented in Section 2.3, the following analyses aim to uncover, through bibliometric mapping and clustering techniques, the social and conceptual structures of the works included in our database. In particular, the social structure is manifested through the construction of co-authorship maps of the authors and countries or territories, which are presented in Figures 3 and 4.



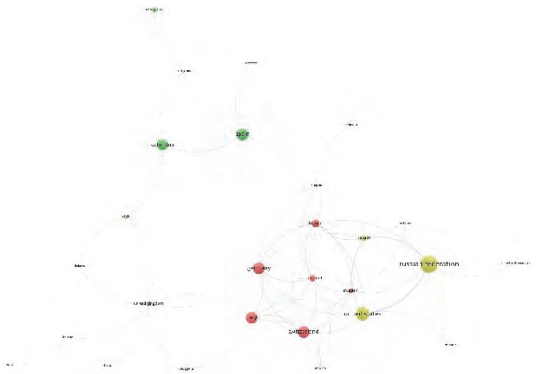
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*Fig. 3: Cooperation network between authors*




*Source: Authors' elaboration using VOSviewer.*

*Fig. 4: Cooperation network between countries and territories*



*Source: Authors' elaboration using VOSviewer.*

Figure 3 displays the network of collaboration among authors. Each node represents an author, and the lines connecting the nodes represent co-authorship relations. The size of the node indicates the number of publications by the author, and the thickness of the lines represents the frequency of collaboration between the authors. Figure 4 presents the cooperation network among countries or territories. Each node represents a country or territory, and the lines connecting the nodes indicate collaborative relations between them. The size of the node is proportional to the number of publications from that country or territory, and the thickness of the lines signifies the extent of collaboration between the countries or territories. The two maps, analysed together, highlight the global distribution of the research and the extent of international collaboration in the field. In particular from figure 3, a certain tendency to keep co-authorship networks within national boundaries seems clear, although there are a few strong links between countries, e.g.

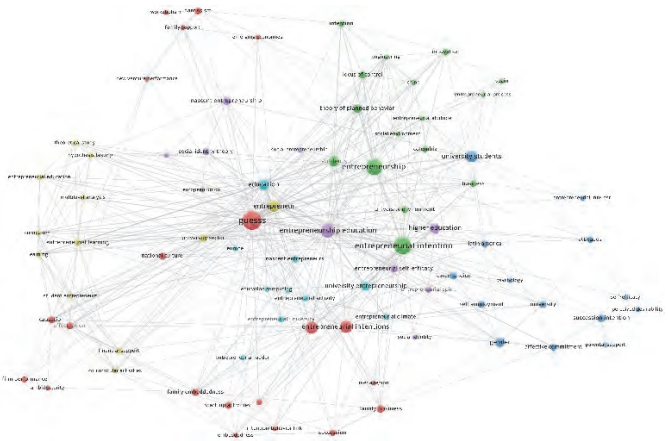


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USA/Russia (Edelman *et al.*, 2016; Manolova *et al.*, 2019; Shirokova *et al.*, 2022), and Italy/Switzerland, represented by the co-authorship relationship between the two GUESSS representatives of each country (Sieger and Minola, 2017).

Afterwards, in order to manifest the conceptual structure of the works included in our database, we used KCA in order to build a Keyword Co-occurrence Network (KCN), which is useful in the exploration of research topics and their relationships in many scientific fields (Bornmann *et al.*, 2018). As demonstrated by some authors (Radhakrishnan *et al.*, 2017), KCN-based analysis has shown advantages over traditional literature review approaches, like the objectivity and reproducibility guaranteed by an analysis relying on quantitative methods, higher efficiency due to processing large volumes of data more quickly and its ease of visual representation of the results. The analysis was performed with VOSviewer, examining co-occurrences between author and index keywords using a full counting method; the closer two keywords appear in the map, the more frequently they co-occur (van Eck and Waltmann, 2010). The bibliometric map obtained is presented in Figure 5.

*Fig. 5: Keywords co-occurrence network.*




*Source: Authors' elaboration using VOSviewer.*

KCN allows for identifying different thematic clusters, which – combined with manual content analysis – support scholars in unpacking the different research streams within the analysed body of research (Yang *et al.*, 2012). In particular, we relied on VOSviewer's clustering function, which assigns keywords to clusters based on their co-occurrence (Bornmann *et al.*, 2018). The identified clusters were: a) family business entrepreneurship (red in Figures 5 and 6 – cfr. Tab A1a); b) country determinants (macro vs micro data) and



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*Fig. 6: Word Clouds of each KCA clusters.*




*Source: Authors' elaboration*



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cross-cultural settings (green in Figures 5 and 6 – cfr. Tab A1b); c) socio-demographic characteristics (e.g. gender, age, education level, culture) and entrepreneurial career paths (blue in Figures 5 and 6 – cfr. Tab A1c); d) the multiplicity of contexts and their impact on entrepreneurship (yellow in Figures 5 and 6 – cfr. Tab A1d); e) personality traits (micro-mechanisms) and entrepreneurial decision-making logic and behaviours (purple in Figures 5 and 6 – cfr. Tab A1e); and, f) the entrepreneurial climate at higher education institutions (light blue in Figures 5 and 6 – cfr. Tab A1f in the Appendix A).

#### 3.2.2 Intellectual Structure

Finally, to uncover the intellectual structure of the field, we then performed through VOSviewer a Bibliographic Coupling Analysis. Similarly to the previous analysis, we obtained six clusters, this time based on the similarity of publications or authors in terms of their shared references (cfr. Figure 7). In bibliographic coupling, in fact, a link is established between two items if they have at least one common reference. The total number of links for an item indicates how many connections it has with other items in the network (its "weight" in the network, visually represented by its size), and the distance between two items is inversely proportional to the number of common references. Having been provided with the most influential works in each cluster, a manual screening of their research topics was performed, and we were able to confirm the cluster classification identified in the previous analysis. As such, using as a base the verified clusterisation obtained through the KCN analysis, we complemented our review with a thematic content analysis of the articles grouped through bibliographic coupling, presenting the research topics that warrant attention, and thereby offering insights into avenues for further research through a review of the articles included within each thematic cluster.

### *3.3. Content Analysis*

This subsection describes the thematic content of the most influential articles appearing in each cluster identified above through the bibliographic coupling analysis. To provide a comprehensive understanding of the main scholarly conversations surrounding student entrepreneurship within the GUESSS dataset, we conducted a thematic content analysis of the articles in these clusters. Building on the previously identified overarching themes from the KCA, we utilised the predefined labels as a starting point. We then

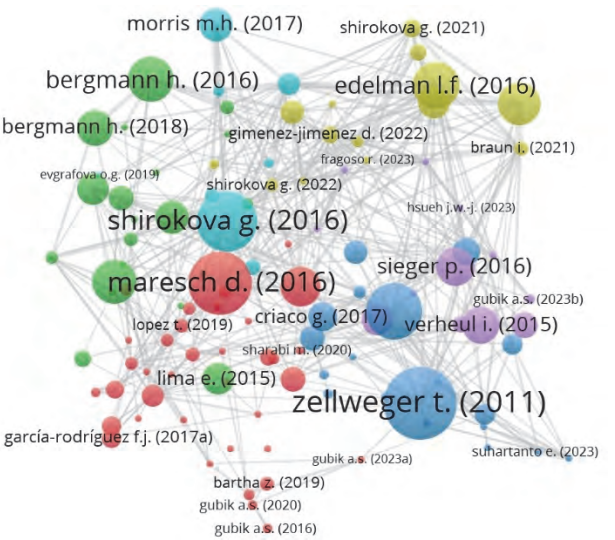


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applied a mixed-methods approach: while the labels derived from the KCA were used deductively, we conducted an inductive analysis of the content of the papers in each cluster to determine the most appropriate match between labels and clusters.

This process allowed us to assign each cluster a label that best captured its dominant theme, discussed individually below.

*Fig. 7: Bibliographic Coupling network.*




*Source: Authors' elaboration using VOSviewer.*

Within these clusters, we identified core concepts and theories examined in the domain of GUESSS research, which are summarised in Table A1 in Appendix A. Below, we explain in greater detail the contents of each cluster to identify the emerging theories and main findings. By manually analysing each thematic cluster, we address the aspect of 'What' (Callahan, 2014) knowledge emerged from our study pool, which corresponds to the structural tenet, namely, 'Theory development' (T) (see Paul and Criado, 2020).

### *Cluster 1: Socio-demographic Characteristics (e.g. gender, age, education level, culture) and Entrepreneurial Career Paths*

Our analysis reveals that the Theory of Planned Behavior (Ajzen, 1991) was the most dominant theory employed by the works in the cluster 1 (e.g. Leiva *et al.* 2021; Silva *et al.*, 2021) followed by the Theory of Entrepreneurial



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Intentions (Bird, 1988), which was found in the works of Bernhofer and Han (2014) and García-Rodríguez *et al.* (2017). These were followed by institutional theory (DiMaggio and Powell, 1983; North, 1990) [see Moreno-Gómez *et al.* (2022)] and the Motivation-Opportunity-Ability (MOA) model by MacInnis and Jaworski (1989) employed in García-Rodríguez *et al.*'s (2017) study. The application of Social Learning Theory (Bandura, 1971) was not used extensively in this cluster with some exceptions in Moreno-Gómez *et al.*'s (2020; 2022) studies, which examined the moderating role of gender in the relationship between parental role models and entrepreneurial intentions of students. Social role theory application (Eagly, 1987) was found in Leiva *et al.* (2021), whilst Sharabi and Polin (2020) examined the career motives of student entrepreneurs according to the degree of religiosity through the lens of agency theory (Fama, 1980). Horvath (2016) employed Social Cognitive Career Theory (SCCT) (Lent *et al.*, 2000) to test a model of entrepreneurial interest using self-efficacy and outcomes expectations as predictors.

Intrapersonal relationships in connection with entrepreneurial thinking and behavior was studied through the lens of Human Capital Theory (Becker, 1964) by Maresch *et al.* (2016) in this cluster. Silva *et al.* (2021) merged TPB with MOA to examine the influence of entrepreneurial educational programmes on entrepreneurial students' intention. Some studies have integrated several theories and models to examine various mechanisms of socio-demographic characteristics (e.g. gender, age, education level) and entrepreneurial career paths. For example, García-Rodríguez *et al.* (2017) used a combination of Theory of Planned Behavior and the MOA model to examine the impact of the social and cultural environment on the entrepreneurial potential in less innovative regions. Moreno-Gómez *et al.* (2022) combined TPB, institutional economic theory, and the theory of social learning with entrepreneurial activity to examine the gender perspective of the parental role model influence on nascent entrepreneurs. Finally, many of the studies in this cluster provide broader contributions on entrepreneurial careers and their antecedents. For example, one line of research considers the entrepreneurial careers of "joiners" (Bartha *et al.*, 2019), i.e., university students employed in start-ups, focusing on the role of workplace experience as an element of personal background shaping their career.

*Cluster 2: Entrepreneurial Climate at Higher Education Institutions*

Similar to cluster 1, TPB was the most commonly used theory in cluster 2 (Valencia-Arias *et al.*, 2022) followed by Human capital theory (Becker, 1964) – see the works of Hahn *et al.* (2017), Sancho et al. (2021). An integrative theoretical framework consisting of Social Learning Theory



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(Bandura, 1971) and organisational climate theory (Rentsch, 1990) was used in Bergmann *et al.* (2016) to investigate the climate for entrepreneurship at higher education institutions. Previous scholarly investigations (see Sancho *et al.*, 2021) have employed a combination of institutional theory and the theory of entrepreneurial intentions to examine whether a favourable entrepreneurial climate is enough to become an entrepreneurial university. In addition to the previously mentioned theories and models, our findings reveal additional theoretical frameworks that have gathered attention and relevance in examining the entrepreneurial climate at higher education institutions. These include the application of Cognitive career theory (Lent *et al.*, 2000) in Hahn *et al.*'s (2022) study, which demonstrated that entrepreneurial learning at university is negatively associated with a preference to work for small firms compared to larger firms. Furthermore, Hahn *et al.* (2020) examined the impact of entrepreneurship education on university students' entrepreneurial skills through the lens of a family embeddedness perspective (Uzzi, 1997). Additionally, Hahn (2020) drew on Social Identity Theory (Tajfel, 1978) in order to demonstrate that universities' involvement in academic entrepreneurship diminishes the negative effects of poor value creation for entrepreneurs' psychological well-being. In terms of dependent variables, most studies focus on entrepreneurial GUESSS projects, analysing data pertaining to the GUESSS 2013 and 2016 editions, and revealing that elective Entrepreneurship Education exerts a generally positive impact on students' entrepreneurial skills, which extends beyond the effects of the university. It underlines, however, that in compulsory Entrepreneurship Education courses, the positive impact on entrepreneurial skills is only observed in "students who perceive higher levels of performance in their parents' entrepreneurial activities" (Hahn *et al.*, 2020, p. 276).

### *Cluster 3: Family Business Entrepreneurship*

The studies in this cluster show that enterprising family backgrounds affect the desirability and feasibility of the entrepreneurial career (Criaco *et al.*, 2017). Some studies focus on the specific features of the family enterprise and the family system (Gimenez-Jimenez *et al.*, 2021; Hahn *et al.*, 2021) that affect entrepreneurial career choices. A recurring theme is the role that family background plays in leading towards succession vs founding intentions (Hahn *et al.*, 2021). Apparently, an enterprising family background opens up an opportunity to undertake succession in the parents' business, but under certain conditions it can also steer students towards a founding career. Together with family the gender of the individual has been considered by some papers of this cluster, for example as contingency in the family-career



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choice relationship (Gimenez-Jimenez *et al.*, 2021). Some of the papers consider motives explicitly in the theorising. For example, Zellweger *et al.* (2011) show how career motives differ between aspiring employees, successors and founders. Campopiano *et al.* (2016) consider entrepreneurship as a means to pursue such an attitude, and it is perceived as a way to proactively contribute to undertaking responsible environmental activities.

In terms of the theories that emerged in the cluster, the Theory of Planned Behavior (Ajzen, 1991) and Theory of entrepreneurial intentions (Shapero, 1982) followed by Social Cognitive Theory (SCT) (Bandura, 1988) appear most frequently in the cluster three. Sieger and Monsen (2015) offer new theoretical insights pertaining to TPB and the Theory of Mixed Control (Monsen and Urbig, 2009) as to why individuals choose to start their own business by comparing entrepreneurial intentions to the intention to work at a university and to be employed in a firm. Applying SCT, Lyons *et al.* (2024) examined the impact of parental emotional support on the succession intentions of next-generation family business members. Through the lens of the family embeddedness perspective (Uzzi, 1997) and Knowledge spillover theory of entrepreneurship (Caiazza *et al.*, 2020), Hahn *et al.* (2021) demonstrated how family embeddedness shapes the entrepreneurial intentions of the next generation. Building on a similar family embeddedness perspective, Sieger and Minola's (2017) study reveals a negative relationship between the availability of a family's financial support and an individual's entrepreneurial intentions. In addition to previously mentioned theories and models, our results reveal additional theoretical lenses that have been instrumental in understanding the nuances of family business entrepreneurship. Applying social comparison theory (Festinger 1954), more specifically, upward social comparison dynamics between children and their entrepreneurial parents, Criaco *et al.* (2017) found that perceived parents' performance in entrepreneurship can have mixed effects for the intergenerational transmission of entrepreneurship. Drawing on a broader cross-cultural theory (Brislin, 1970), Laspita *et al.* (2012) tested a model of the transmission of entrepreneurial intentions within families in different cultures and found that the strength of both direct and indirect effects from parents on their offsprings' entrepreneurial intentions varies depending on the cultural context. Other papers in this cluster focus on motives in a less explicit way but speculate on why some specific antecedents motivate (or discourage) the pursuit of an entrepreneurial career, often recurring to mediation or moderation models. For example, Zellweger *et al.* (2016) explored the specific mediators through which family affects entrepreneurial career choices, highlighting the role of self-efficacy and discount expectations as economic and non-economic motivations to pursue successions.



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*Cluster 4: Multiplicity of Contexts and their Impact on Entrepreneurship*

The research in this cluster highlights the importance of contextual variables in nascent and active entrepreneurship. In general, the papers of these clusters use student entrepreneurs as a special case of embedded entrepreneurs through which they aim for broader contributions to entrepreneurial decision-making. For example, many of these studies focus on effectual vs. causation decision-making as a driver of firm performance (Smolka *et al.*, 2018) and focus on the drivers of effectuation/causation (Shirokova *et al.*, 2021) and on the contingencies in the decision-making – performance relationship. Taken together, these studies highlight the importance of combining effectuation and causation and that context, such as family or institutions, can help to combine the two processes and also to benefit from them. Similarly, Wales *et al.* (2021) focus on institutions as key contingency in the entrepreneurial orientation-performance relationship in students' ventures. Another strategic posture investigated by research in this cluster is risk-taking: Gimenez-Jimenez *et al.* (2022) looked at how gender in combination with culture affects the risk taken by entrepreneurs, using university students as an empirical setting. A special mention is deserved by papers in this cluster that focus on university students' families and universities as drivers of nascent entrepreneurs' decision-making. Apart from Braun and Sieger (2021), who focus on the effect of family financial support on student ventures' ambidexterity, Edelman *et al.* (2016) explore how family influences the scope of startup activities by nascent entrepreneurs, while Manolova *et al.* (2019) show how family shapes nascent entrepreneurs' navigation of institutional voids.

The most common theoretical underpinnings and models used to examine the interplay among the constructs in cluster 4 include Institutional theory (DiMaggio and Powell, 1983; North, 1990) and Causal and Effectual Decision-Making Logics on Venture (Sarasvathy, 2001), followed by TBP and the Mixed Embeddedness Perspective (Langevang *et al.*, 2015). Previous scholarly investigations by Shirokova *et al.* (2022) have employed a combination of TPB and an institutional perspective and found that whilst legal institutions seem to have a significant positive impact on the translation of intentions into actions, the quality of the national financial system does not seem to play a strong role in this interplay. However, in another study, Wales *et al.* (2021) demonstrated that institutions in general positively moderate the entrepreneurial orientation-performance relationship through increased resource access. Applying TPB and the social embeddedness perspective (McKeever *et al.* 2014). Weiss *et al.* (2019) found that the translation of entrepreneurial intention into start-up behaviours can be facilitated by means



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of growing regional social capital via the enhancement of social trust and regional cultural diversity. Based on a mixed embeddedness theoretical lens, Weiss *et al.* (2023) provide evidence of the joint role of micro-level and macro-level cultural layers in reducing the entrepreneurial gender gap.

### *Cluster 5: Personality Traits (micro-mechanisms) and Entrepreneurial Decision-making Logic and Behaviors*

The research in this cluster highlights the importance of various individual-level characteristics for entrepreneurial decision-making and behaviours. The theories emerging in cluster five have their roots in the domains of sociology and psychology. Social Identity theory (SIT) (Tajfel, 1978) was the most commonly applied theory together with The Dark Triad personality traits (Hare, 1985). Drawing on Social Identity Theory and the classification of founders' social identities, namely, Darwinians, Communitarians, and Missionaries, Sieger *et al.* (2016) developed and tested a corresponding scale of the social identity of entrepreneurs. In the most recent study, Braun *et al.* (2023) further applied the lens of SIT, more specifically, whether having a Communitarian or Missionary founder social identity along with economic prosperity are potential explanatory factors in facilitating the transition from nascent to active entrepreneurship. Brändle *et al.* (2018) and Gonzalez-Canosa *et al.* (2021) considered social identity as a key element to understand student entrepreneurs' goals and in the formation of entrepreneurial intentions and its antecedents.

Integrating the Dark Triad constellation of three socially aversive personality traits from a psychological theory of personality with Upper echelons theory (Hambrick and Mason, 1984), Shirokova *et al.* (2024) found that narcissism can enhance new venture performance through the workaholism of the founder. Schwartz's value orientation theory (Schwartz, 1992; 1994) was applied in Karpinskaia *et al.*'s (2025) study, which demonstrated that embeddedness and harmony values are associated with lower levels of progress in the venturing process, whilst in autonomous and mastery cultures the effect of proactiveness on the venturing process is stronger. Moving the attention from family to individual non-economic motives, Baldegger *et al.* (2017) explored the role of narcissism in motivating the pursuit of an entrepreneurial career, from which narcissistic people can obtain non-economic utility. Drawing on SIT and self-efficacy theory (Bandura, 1982), Brändle *et al.* (2018) demonstrated that entrepreneurs' social identity, related to the type of opportunity they pursue, might shed light on different levels of entrepreneurial self-efficacy. The papers in this cluster also examined the role of mental disorders (Verheul *et al.*, 2015; 2016), in particular ADHD, in stimulating entrepreneurial intentions or actual self-employment.



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*Cluster 6: Country Determinants (macro vs micro data) and Cross-Cultural Settings*

The research in this cluster highlights the importance of various country-level characteristics and cross-cultural conditions that strengthen or weaken entrepreneurial decision-making and behaviours. TPB appears to serve as the theoretical lens to help in providing a nuanced understanding of the intention–behaviour link. Shirokova *et al.* (2015) found that both individual (family entrepreneurial background, age, gender) and environmental characteristics (university environment, uncertainty avoidance) impact on the translation of entrepreneurial intentions into entrepreneurial actions. Morris *et al.* (2017) and Shirokova *et al.* (2015) applied embeddedness theory (Granovetter, 1992) to produce research evidence to support the notion that prior business experience moderates the relationships between student involvement in university initiatives and start-up activities, with the entrepreneurial self-efficacy strengthening the effect of the translation of entrepreneurial intentions into action. Shirokova *et al.*'s (2016) study examined how local institutions, culture and other environmental and personal factors facilitate or frustrate the translation of founding intentions into actions, thereby improving our general understanding of the decision-making of nascent entrepreneurs. Other empirical works in this cluster consider the role of personal resources (human and financial capital) in shaping university students' entrepreneurial careers in terms of industry choice (e.g. Knatko *et al.*, 2016). Beliaeva *et al.* (2017) established an interesting distinction between entrepreneurial learning and entrepreneurial teaching and found a positive relationship between entrepreneurial learning and students' entrepreneurial intentions. That relationship was found to be moderated by various dimensions of national culture, being stronger in individualistic cultures and weaker in high uncertainty avoidance society.

## 4. Limitations within and Across Thematic Clusters and Future Research Agenda

Based on the content analysis of the papers included in the six clusters identified with bibliographic coupling, we outline a future research agenda, which is summarised in Table A2 in Appendix A and Figure 8, stemming from the limitations that emerged in each cluster.

The first cluster reveals common limitations: a narrow focus on entrepreneurial attitude determinants that neglects other influential factors, sample



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biases (over- and under-representation of specific regions), limited external validity due to concentration on specific populations (e.g. female business students), and data collection challenges in developing countries linked to fragmented business demographics and under-considered socio-cultural factors.

Future research should broaden the determinants examined (e.g. social networks, subjective vitality, affective commitment), give special attention to female entrepreneurship across disciplines beyond business studies, pursue cross-cultural replications to strengthen generalisability, diversify student samples, and investigate how educational practices and parental role models shape entrepreneurial intentions. Expanding control variables and improving data collection infrastructure in developing countries would further strengthen this stream.

The second cluster shares similar limitations with the first: prevalent measurement issues in assessing complex constructs such as entrepreneurial climate and internationalisation, data challenges (small samples, quality issues), a short-term focus that neglects long-term outcomes, and geographic/contextual restrictions (e.g. Germany, Vietnam) that limit generalisability, alongside frequently omitted non-curricular factors and gender biases.

Future research should develop standardised, robust measures for these constructs, improve proxies and regional/institutional control variables to better capture long-term impacts, incorporate non-curricular factors such as family involvement, and examine how gender, demographic variables and university culture interact with entrepreneurial outcomes.

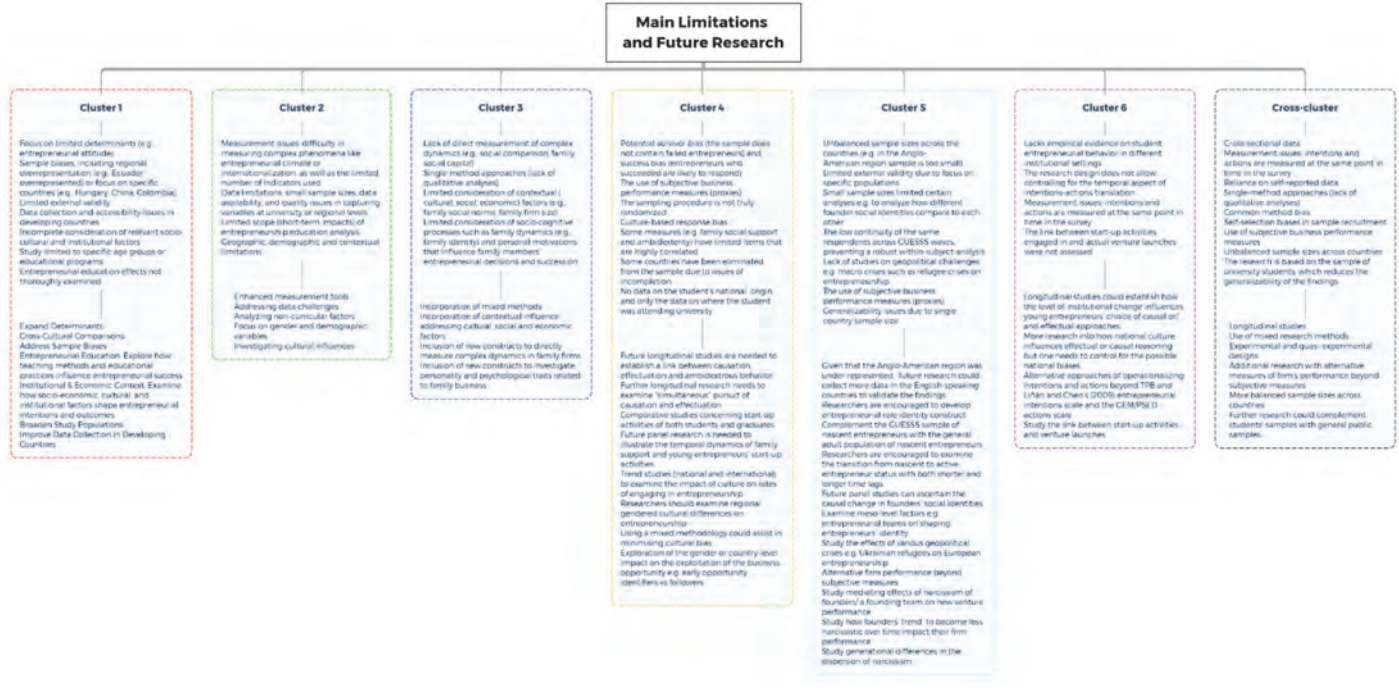
The third cluster (family business entrepreneurship) is limited by missing GUESSS variables (e.g. firm size, direct measures of family firm dynamics), samples concentrated on western students, insufficient attention to contextual and socio-cognitive factors, and an over-reliance on single quantitative methods. Future research should incorporate mixed methods, extend samples beyond western contexts, further explore socio-cognitive factors, and expand the GUESSS survey with validated scales measuring family firms' complex dynamics (e.g. social comparison, family social capital).

The fourth cluster (multiplicity of contexts) shares limitations with the previous three: a non-randomised student sample, a cross-sectional design that precludes causal claims, incomplete country coverage, survivor/success bias (failed entrepreneurs are underrepresented), and culture-related response bias. Longitudinal designs and more rigorous cross-cultural methods are proposed to address these issues.



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*Fig. 8: Main Limitations and Future Research*




*Source: Authors' elaboration*



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The fifth cluster (personality traits and decision-making) is limited by unbalanced sample sizes across countries (e.g. a smaller Anglo-American sample) and a reliance on subjective performance measures. Research on the impact of geopolitical crises (e.g. the Ukrainian refugee flow) on entrepreneurship remains scarce, and founder personality research has focused on the Dark Triad while the Big Five and generational differences in narcissism remain understudied. Longitudinal designs are again proposed as a way forward.

The sixth cluster (country determinants and cross-cultural settings) is limited by measuring intentions and actions within the same survey, and by not tracking whether start-up activities translate into actual venture launches. Future research should explore alternative approaches to operationalising intentions and actions beyond TPB, Liñán and Chen's (2009) scale and the GEM/PSED actions scale, ideally in a longitudinal setting that can also capture how institutional change shapes entrepreneurs' causal versus effectual preferences.

Our analysis demonstrated that all of the clusters share some limitations. The reliance on cross-sectional data inhibits the exploration of causal relationships and dynamic changes over time, while self-selection biases in sample recruitment (e.g. voluntary participation in entrepreneurship courses) raise concerns about validity. The over-reliance on self-reported, single-method data contributes to common-method bias and prevents a thorough examination of changes from entrepreneurial intention to actual behaviour, an issue compounded by the use of PLS-SEM, which is sensitive to weak effect sizes. The GUESSS survey being available only in English further limits the participation of non-native speakers. Opting for longitudinal designs, multi-method approaches, and experimental or quasi-experimental designs would allow researchers to capture shifts from intention to actual entrepreneurship more effectively and test hypotheses on entrepreneurship education and students' entrepreneurial behaviour more robustly.

## 5. Discussion and Conclusion

To the best of the authors' knowledge, this paper is the first bibliometric review on the research focused on the GUESSS project. To answer our RQs, we conducted bibliometric and content analyses in order to offer a systematisation of the last 23 years of research on student entrepreneurship using the GUESSS dataset. Using the hybrid review methodology, which combines bibliometric analysis with the structured review tenets to unpack the underlying theories, the study offers a comprehensive overview of the GUESSS scholarship on entrepreneurship and suggests a future research agenda.



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In addressing RQ1, the bibliographic coupling analysis portrayed a comprehensive intellectual structure of the GUESSS student entrepreneurship research, identifying the most influential journals, authors and institutions and revealing common patterns and potential research gaps (see Section 3.1 for the full performance analysis).

In answering the second research question, our bibliometric literature review integrates the GUESSS field's conceptual, intellectual and social structure from an interactive and holistic perspective. Through co-authorship analysis (Peters and van Raan, 1991), we find that more than 90% of the studies in our review were written by at least two authors, with Shirokova (National Research University Higher School of Economics, Russia), Minola (University of Bergamo) and Sieger (University of Bern) as the most published authors to date.

By eliciting six thematic clusters, which illustrate core research directions as well as under-researched areas, we have provided an elaborate overview of the theories underpinning the existing GUESSS research. We have mapped the core theoretical and empirical foundations underlying the evolution of this domain across the six clusters: 1) socio-demographic characteristics (e.g. gender, age, education level, culture) and entrepreneurial career paths; 2) the entrepreneurial climate at higher education institutions; 3) family business entrepreneurship; 4) the multiplicity of contexts and their impact on entrepreneurship; 5) personality traits (micro-mechanisms) and entrepreneurial decision-making logic and behaviours; and, 6) country determinants (macro vs micro data) and cross-cultural settings.

TPB was the most dominating and solidified theory in clusters I, II, III and VI, which suggests that TPB (Ajzen, 1991) remains the key theoretical lens for this field of study. Other models that studied entrepreneurship as intentional and planned actions, that offer an opportunity to explain and predict entrepreneurial activity, include Shapero's model of the 'entrepreneurial event' (1982) and Bird's entrepreneurial intentions model (1988), representing a combination of a person's rationality and intuition about their venture creation and the influence of various personal and contextual factors. Institutional theory (DiMaggio and Powell, 1983; North, 1990) was found to be a dominant theory in cluster III, themed as family business entrepreneurship, and one of the leading theories in cluster I, themed as socio-demographic characteristics (e.g. gender, age, education level, culture) and entrepreneurial career paths. Among other seminal theories that GUESSS scholars have applied in their research was Human Capital Theory (Becker, 1964) in cluster II, themed as examining various factors influencing the entrepreneurial climate at higher education institutions. Social Cognitive Theory (Bandura, 1988) appears as one of the leading theories that has been instrumental in examining family business



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(cluster III) and the link between socio-demographics and entrepreneurial career paths (cluster I). Social Identity Theory (Tajfel, 1978) and The Dark Triad personality constellation of three socially aversive personality traits -narcissism, Machiavellianism and psychopathy (Paulhus and Williams, 2002) have been emerging as key psychological lenses for examining and understanding the personality traits of founders in the GUESSS research field and how these psychological micro foundations are related to entrepreneurial decision-making (cluster V). Causal and effectual decision-making logic (Sarasvathy, 2001) has been applied to examine how entrepreneurs can influence or/and control the multiplicity of contexts and environmental contingencies in their pursuit of entrepreneurial goals (cluster IV) including macro determinants (cluster VI). Despite the fact that new ventures are often resource deprived and inexperienced (Parida *et al.*, 2016), a resource-based view (Barney 1991) was not identified among the dominating theoretical lens in cluster V, themed as personality micro-mechanisms and entrepreneurial decision-making logic and behaviours. We therefore recommend integrating more a resource-based view (Barney 1991) in future research, in order to obtain a more nuanced view of the mechanisms that founders of new ventures employ to compensate for the lack of resources. Finally, despite the growing importance of a better understanding of the "context to theory" – how contextualisation enhances theoretical advancement in the entrepreneurship research (Shirokova *et al.*, 2023) – the contingency theory approach (Venkatraman, 1990) was underrepresented in cluster VI. Through applying the contingency theory lens by means of including theoretically relevant contextual moderators the GUESSS research could advance the research frontier regarding the role of context for the theory development in youth entrepreneurship.

To address our third research question, we identified the limitations in each cluster as well as across clusters and developed detailed future research directions (see Figure 8 and Table A3 in the Appendix A). As an emergent field since 2003, GUESSS research has over-relied on TPB and other intentional, planned-behaviour theories, even though starting a business is often a lengthy, non-linear undertaking for which the intention-action link is comparatively weak. To better capture the psychology of both non-entrepreneurs and entrepreneurs, future work could extend to Schwartz Value Theory (1992) and Self-Regulation theory (Carver and Scheier, 2012), alongside social capital theory (Nahapiet and Ghoshal, 1998) to understand interpersonal trust, and explore the social legitimacy of entrepreneurship and individual dissatisfaction as drivers of youth entrepreneurship (Thurik and Dejardin, 2012). Methodologically, we encourage configurational approaches such as qualitative comparative analysis (Rippa *et al.*, 2023) to move beyond the current overuse of causal-hypothesis-testing methods.



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Finally, future GUESSS surveys could benefit from incorporating the framework of evolutionary theory (Breslin, 2008), allowing for a dynamic, multi-level analysis of students' entrepreneurial intentions. This approach is closely aligned with the concept of co-evolution, which views organisational adaptation as a two-way interaction process between organisations and their competitive environment, emphasising interdependence and mutual feedback loops (Weber, 2017). The application of co-evolutionary principles could shed light on how the reciprocal evolution of students' entrepreneurial intentions and the educational or socio-economic environment occurs (Abatecola *et al.*, 2020). For example, researchers could explore how universities and entrepreneurial ecosystems adapt in tandem, shaping and being shaped by students' evolving cognitive heuristics, routines and behaviours. Integrating this lens into GUESSS could provide nuanced insights into how dynamic interactions between individuals and their environments facilitate or constrain the emergence of entrepreneurial initiatives.

The primary purpose of GUESSS is to monitor and better understand students' entrepreneurial spirit and behaviour. The advantage of GUESSS lies in its external validity with 50-plus countries in the latest 2023 wave and the fact that it allows for capturing different stages of entrepreneurial progress – non-, intentional, nascent and active entrepreneurs. However, one of the disadvantages of GUESSS is that it focuses on university students and does not cover the general (working) population. Another area of improvement we suggest is to remedy the lack of continuity regarding some constructs in the GUESSS survey: innovation ambidexterity strategy questions were included in the 2018 wave but not in the 2021 and 2023 waves. Relatedly, we suggest that the GUESS questionnaire incorporate actual innovative ambidexterity practices as well as realised innovative ambidexterity. Given the growing prominence of the digital economy, we suggest that future GUESSS research should explicitly address digitalization as a cross-cutting theme. Including specific questions about digital entrepreneurship and digital ecosystems (DEEs) would allow scholars to investigate how digital transformation intersects with student venture creation processes and intentions in the post-pandemic era. One possible direction is that GUESSS could conduct survey waves devoted to particular trends and current pressing issues in the entrepreneurship research in order to capture these issues in depth and obtain a more nuanced picture of research sub-fields.

Building on the "closed community" pattern noted in Section 3.1, we recommend rethinking data access policies for the GUESSS dataset, potentially aligning it with more open entrepreneurship datasets such as GEM (Acs *et al.*, 2008), to enhance its contribution to understanding entrepreneurial dynamics.



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A key recommendation we propose for future GUESSS surveys is the inclusion of alternative performance measurements that go beyond subjective self-assessments. The current reliance on subjective measures of entrepreneurial success limits the scope of performance evaluation. We therefore suggest incorporating objective indicators, such as revenue growth, number of employees, or external funding raised, to provide a more comprehensive assessment of entrepreneurial outcomes. This would offer more robust data for researchers studying entrepreneurial performance and would be especially relevant for cross-country comparisons or multi-level research involving longitudinal data. In the same vein, it is also recommended that the number of individuals be increased for multi-level research involving longitudinal data. Going forward, more balanced sampling in relation to country size is advisable to ensure that the number of individuals is in line with a country size.

Finally, we are well aware of the potential limitations of bibliometric reviews (e.g., biases due to self-citations, considering documents that have already been published and indexed). In our analysis, papers were only included if they were indexed in the Scopus database as of April 11, 2024. This approach ensured that we could rely on consistent and comprehensive metadata to conduct the analyses. However, this also means that some of the most recent publications, which may not yet have been indexed by Scopus at that time, have been excluded. Despite this limitation, we believe that our review offers valuable insights into the conceptual, intellectual and social structures within the GUESSS research up to this date. Furthermore, we hope to offer useful recommendations to scholars using GUESSS. We also intend to catalyse the interest of scholars interested not only in student entrepreneurship as such, but more broadly of those scholars who would like to advance entrepreneurship research using student entrepreneurship as a valuable and unique setting.

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# Appendix A
# Keywords, Theories, Limitations and Future Research

*Tab. A1a: Keywords in family business entrepreneurship cluster.*

| Keyword | Occurrences* | Links |
|---|---|---|
| *guesss* | 29 | 54 |
| *entrepreneurial intentions* | 12 | 28 |
| *student entrepreneurship* | 12 | 33 |
| *family business* | 5 | 13 |
| *causation* | 4 | 18 |
| *effectuation* | 4 | 18 |
| *family embeddedness* | 4 | 15 |
| *narcissism* | 4 | 7 |
| *national culture* | 4 | 13 |
| *start-up activities* | 4 | 9 |
| *firm performance* | 3 | 4 |
| *intention-action gap* | 3 | 7 |
| *succession* | 3 | 8 |
| *ambidexterity* | 2 | 5 |
| *embeddedness* | 2 | 10 |
| *emerging economies* | 2 | 7 |
| *family support* | 2 | 7 |
| *intention-behavior link* | 2 | 6 |
| *mena region* | 2 | 5 |
| *new venture performance* | 2 | 8 |
| *workaholism* | 2 | 4 |

*Source: Authors' elaboration on VOSviewer output data.*
** The occurrence number of a keyword represents the frequency at which the keyword appears in a dataset, while the number of links of a keyword refers to the count of unique co-occurrence relationships it has with other keywords in the dataset.*



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*Tab. A1b: Keywords in country determinants (macro vs micro data) and cross-cultural settings cluster*

| Keyword | Occurrences* | Links |
|---|---|---|
| *entrepreneurial intention* | 24 | 36 |
| *entrepreneurship* | 21 | 33 |
| *students* | 8 | 25 |
| *theory of planned behavior* | 6 | 15 |
| *locus of control* | 4 | 15 |
| *university environment* | 4 | 10 |
| *business* | 3 | 17 |
| *colombia* | 3 | 5 |
| *innovation* | 3 | 13 |
| *intention* | 3 | 9 |
| *china* | 2 | 11 |
| *engineering* | 2 | 15 |
| *entrepreneurial attitude* | 2 | 7 |
| *entrepreneurial process* | 2 | 7 |
| *social environment* | 2 | 6 |
| *spain* | 2 | 7 |

*Source: Authors' elaboration on VOSviewer output data.*
** The occurrence number of a keyword represents the frequency at which the keyword appears in a dataset, while the number of links of a keyword refers to the count of unique co-occurrence relationships it has with other keywords in the dataset.*



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*Tab. A1c: Keywords in socio-demographic characteristics (e.g. gender, age, education level, culture) and entrepreneurial career paths cluster*

| Keyword | Occurrences* | Links |
|---|---|---|
| *university students* | 11 | 18 |
| *gender* | 7 | 13 |
| *succession intention* | 5 | 9 |
| *affective commitment* | 4 | 7 |
| *career choice* | 4 | 7 |
| *latin america* | 4 | 10 |
| *self-employment* | 4 | 6 |
| *university* | 4 | 10 |
| *attitudes* | 3 | 8 |
| *entrepreneurial interest* | 2 | 4 |
| *parental support* | 2 | 2 |
| *perceived desirability* | 2 | 2 |
| *psychology* | 2 | 7 |
| *self-efficacy* | 2 | 5 |

*Source: Authors' elaboration on VOSviewer output data.*
** The occurrence number of a keyword represents the frequency at which the keyword appears in a dataset, while the number of links of a keyword refers to the count of unique co-occurrence relationships it has with other keywords in the dataset.*



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*Tab. A1d: Keywords in multiplicity of contexts and crises and their impact on entrepreneurship cluster*

| Keyword | Occurrences* | Links |
|---|---|---|
| *entrepreneur* | 10 | 46 |
| *university sector* | 4 | 27 |
| *entrepreneurial learning* | 3 | 19 |
| *co-curricular activities* | 2 | 15 |
| *curriculum* | 2 | 16 |
| *entrepreneurial education* | 2 | 11 |
| *financial support* | 2 | 15 |
| *hypothesis testing* | 2 | 13 |
| *learning* | 2 | 16 |
| *multilevel analysis* | 2 | 14 |
| *student entrepreneurs* | 2 | 13 |
| *theoretical study* | 2 | 13 |

*Source: Authors' elaboration on VOSviewer output data.*
** The occurrence number of a keyword represents the frequency at which the keyword appears in a dataset, while the number of links of a keyword refers to the count of unique co-occurrence relationships it has with other keywords in the dataset.*



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*Tab. A1e: Keywords in personality traits (micro-mechanisms) and entrepreneurial decision-making logic and behaviors cluster*

| Keyword | Occurrences* | Links |
|---|---|---|
| *entrepreneurship education* | 15 | 42 |
| *higher education* | 9 | 18 |
| *entrepreneurial self-efficacy* | 5 | 14 |
| *nascent entrepreneurship* | 5 | 12 |
| *social identity theory* | 4 | 12 |
| *entrepreneurial spirit* | 3 | 5 |
| *european union* | 2 | 6 |
| *founder social identity* | 2 | 9 |
| *social entrepreneurship* | 2 | 6 |
| *social identity* | 2 | 3 |

*Source: Authors' elaboration on VOSviewer output data.*
** The occurrence number of a keyword represents the frequency at which the keyword appears in a dataset, while the number of links of a keyword refers to the count of unique co-occurrence relationships it has with other keywords in the dataset.*



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*Tab. A1f: Keywords in entrepreneurial climate at higher education institutions cluster*

| Keyword | Occurrences* | Links |
|---|---|---|
| *education* | 9 | 38 |
| *university entrepreneurship* | 7 | 14 |
| *nascent entrepreneurs* | 4 | 9 |
| *entrepreneurial activity* | 3 | 9 |
| *entrepreneurial climate* | 3 | 9 |
| *entrepreneurial university* | 3 | 9 |
| *education computing* | 2 | 7 |
| *entrepreneurial ladder* | 2 | 5 |
| *europe* | 2 | 10 |
| *societies and institutions* | 2 | 7 |

*Source: Authors' elaboration on VOSviewer output data.*
** The occurrence number of a keyword represents the frequency at which the keyword appears in a dataset, while the number of links of a keyword refers to the count of unique co-occurrence relationships it has with other keywords in the dataset.*



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*Tab. A2: Theories and models employed in GUESSS research for each cluster*

| Cluster | Theories (origin) | Occurrences | (Selected) references |
|---|---|---|---|
| **Cluster I – Socio-demographic characteristics (e.g. gender, age, education level, culture) and entrepreneurial career – paths** | Theory of Planned Behavior (Ajzen,1991) | 29 | e.g. Bogatyreva *et al.* (2019); García-Rodríguez *et al.* (2017a;b); Gil-Soto *et al.* (2022); Leiva *et al.* (2021); Lopez *et al.* (2021); Lopez and Alvarez (2019); Silva *et al.* (2021); Ramos-Rodríguez et a. (2019); Renart *et al.* (2022) |
| | Entrepreneurial Intentionality models (Bird, 1988; Krueger, 1993; Shapero, 1975; 1982) | 3 | Bernhofer and Han (2014); Sekerbayeva (2023); Stabingis and Raupeliene (2023); |
| | Institutional theory (DiMaggio and Powell, 1983; North, 1990) | 3 | Lopez and Alvarez (2019); Moreno-Gómez *et al.* (2022); Skrbková and Rydvalová (2023) |
| | Social cognitive theory (Bandura, 1988a; 1988b; 1991) | 3 | Gubik (2021); Gubik and Farkas (2020); Horvath (2016) |
| | Entrepreneurial Event Theory (Shapero, 1982) | 2 | Holienka *et al.* (2017); Víquez-Paniagua *et al.* (2022) |
| | Theory of motivation, opportunity and ability (MOA) (MacInnis and Jaworski, 1989; MacInnis *et al.*, 1991) | 2 | García-Rodríguez *et al.* (2017); Silva *et al.* (2021) |
| | Social learning theory (Bandura, 1971; Scherer *et al.*,1989) | 2 | Moreno-Gómez *et al.* (2020; 2022) |
| | Social role theory (Eagy, 1987; Eagly and Wood, 1999; Eagly *et al.*, 2000) | 1 | Leiva *et al.* (2021) |
| | Human capital theory (Becker, 1964; Mincer, 1958) | 1 | Maresch *et al.* (2016) |
| | Agency theory (Eisenhardt, 1989; Fama, 1980; Hill and Jones, 1992; Long and Walkling, 1984). | 1 | Sharabi and Polin (2020) |
| | Cognitive career theory (SCCT) (Lent, Brown, and Hackett, 2000) | 1 | Horvath (2016) |



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| Cluster | Theories (origin) | Occurrences | (Selected) references |
|---|---|---|---|
| | Interpersonal trust theory (Mayer *et al.*, 1995) | 1 | Gillanders *et al.* (2021) |
| **Cluster II – Entrepreneurial climate at higher education institutions** | Theory of Planned Behavior (Ajzen,1991) | 4 | Iazzolino *et al.* (2019); Laspita *et al.* (2023); Lima *et al.* (2015); Valencia-Arias *et al.* (2022) |
| | Implementation intention theory (Gollwitze, 1999) | 1 | |
| | Human capital theory (Becker, 1964; Mincer, 1958) | 3 | Hahn *et al.* (2017); Leiva *et al.* (2022; 2023); Sancho (2021) |
| | Social learning theory (Bandura, 1971; Scherer *et al.*, 1989) | 2 | Bergman *et al.* (2016; 2018) |
| | Organizational psychology theory and team formation literature i.e. organizational climate (Schneider, 2000; Schneider, White, and Paul, 1998) | 2 | Bergman *et al.* (2016; 2018) |
| | Institutional theory (DiMaggio and Powell, 1983; North, 1990; 2005) | 2 | Guerrero *et al.* (2016); Sancho (2021) |
| | Entrepreneurial Intentionality models (Bird, 1988; Krueger, 1993; Shapero, 1975; 1982) | 1 | Sancho *et al.* (2021) |
| | Social Identity theory (Stets and Burke, 2000; Tajfel, 1978; Tajfel and Turner, 1986). | 1 | Hahn (2020) |
| | Cognitive career theory (SCCT) (Lent, Brown, and Hackett, 2000) | 1 | Hahn *et al.* (2022) |
| | A family embeddedness perspective (Uzzi, 1997) | 1 | Hahn *et al.* (2020) |
| | Opportunity-recognition beliefs approach (Grégoire *et al.*, 2010) | 1 | Bergmann (2017) |
| | Organizational climate theory (Rentsch, 1990) | 1 | Bergmann *et al.* (2016) |
| | Endogenous growth perspective (Romer, 1990) | 1 | Guerrero *et al.* (2016) |
| **Cluster III – Family business** | Theory of Planned Behavior (Ajzen,1991) | 8 | Cano and Tabares (2017; 2018); Cano *et al.* (2017); Laspita *et al.* |



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| Cluster | Theories (origin) | Occurrences | (Selected) references |
|---|---|---|---|
| **entrepreneurship** | Entrepreneurial Intentionality models (Krueger, 1993; Shapero, 1975; 1982) | 2 | (2012); Ljubotina *et al.* (2018); Sieger and Monsen (2015); Sieger and Minola (2017); Tabares and Cano (2018); Zellweger *et al.* (2011) |
| | Social cognitive theory (Bandura, 1988a; 1988b; 1991) | 3 | Lyons *et al.* (2023); Sieger and Monsen (2015); Suhartanto (2023) |
| | Theory of mixed control (Monsen and Urbig, 2009) | 2 | Sieger and Monsen (2015); Zellweger *et al.* (2011) |
| | Social Exchange theory (Gouldner, 1960; Foa and Foa, 1980) | 2 | Suhartanto (2023; 2024) |
| | Family embeddedness perspective (Uzzi, 1997) | 2 | Hahn *et al.* (2021); Sieger and Minola (2017) |
| | Family Science and Intergenerational solidarity theory (Jaskiewicz *et al.*, 2017) | 1 | Gimenez-Jimenez *et al.* (2021) |
| | Human capital theory (Becker, 1964; Mincer, 1958) | 1 | Suchankova *et al.* (2023) |
| | Agency theory (Eisenhardt, 1989; Fama, 1980) | 1 | Suchankova *et al.* (2023) |
| | Imprinting theory (Marques *et al.*, 2022) | 1 | Suchankova *et al.* (2023) |
| | Institutional theory (DiMaggio and Powell, 1983; North, 1990) | 1 | Torres *et al.* (2023) |
| | Cross-cultural theory (Brislin, 1970) | 1 | Laspita *et al.* (2012) |
| | Entrepreneurial career theory (Schein, 1978) | 1 | Zellweger *et al.* (2011) |
| | Knowledge spillover theory of entrepreneurship (Caiazza *et al.*, 2015; 2020) | 1 | Hahn *et al.* (2021) |
| | Social comparison theory (Festinger 1954; Wood, 1989) | 1 | Criaco *et al.* (2017) |
| **Cluster IV-Multiplicity of contexts and their** | Institutional theory (DiMaggio and Powell, 1983; North, 1990) | 7 | Bakkar *et al.* (2021); Fragoso *et al.* (2024); Gimenez-Jimenez *et al.* (2022); Guerrero and |



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| Cluster | Theories (origin) | Occur-rences | (Selected) references |
|---|---|---|---|
| **impact on entrepreneurship** | | | Marozau (2023); Manolova *et al.* (2021); Shirokova *et al.* (2022); Wales *et al.* (2021) |
| | Causal and Effectual Decision-Making Logics (Mintzberg, 1978; Sarasvathy, 2001, 2008) | 3 | Braun and Sieger (2021); Laskovaia *et al.* (2017); Smolka *et al.* (2016) |
| | Theory of Planned Behavior (Ajzen,1991) | 2 | Shirokova *et al.* (2022); Weiss *et al.* (2019) |
| | Mixed embeddedness perspective (Kloosterman *et al.*, 1999; Langevang *et al.*, 2015) | 2 | Fragoso *et al.* (2024);Weiss *et al.* (2023) |
| | Family embeddedness perspective (Uzzi, 1997) | 2 | Braun and Sieger (2021) |
| | Social embeddedness perspective (Aldrich and Zimmer; 1986; McKeever *et al.* 2014) | 2 | Weiss *et al.* (2019; 2023) |
| | Social legitimacy perspective (Etzioni, 1987). | 1 | Laskovaia *et al.* (2017) |
| **Cluster V – Personality traits(micro-mechanisms) and entrepreneurial decision-making logic and behaviors** | Social Identity theory (Stets and Burke, 2000; Tajfel, 1978; Tajfel and Turner, 1986). | 6 | Braun *et al.* (2023); Brändle *et al.* (2018); Gonzalez-Canosa *et al.* (2021); Hsueh *et al.* (2023); Karpinskaia *et al.* (2025); Sieger *et al.* (2016) |
| | The Dark Triad personality traits (Christie and Geis, 1970; Hare, 1985; Raskin and Terry, 1988) | 3 | Baldegger *et al.* (2017); Shirokova *et al.* (2024) |
| | Self-efficacy (Bandura, 1981) | 2 | Brändle *et al.* (2018); Gonzalez-Canosa (2021) |
| | Theory of Planned Behavior (Ajzen,1991) and Theory of entrepreneurial intentions (Krueger, 1993; Shapero, 1975; 1982) | 2 | Verheul *et al.* (2015; 2016) |
| | The person–environment (P–E) fit theory (Kristof, 1996; Kristof-Brown *et al.* 2005) | 2 | Baldegger *et al.* (2017); Verheul *et al.* (2015; 2016) |
| | Identity theory (Callero, 1985) | 1 | Karpinskaia *et al.* (2023) |



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| Cluster | Theories (origin) | Occur-rences | (Selected) references |
|---|---|---|---|
| | The gestation process perspective (Alsos and Kolvereid, 1998) | 1 | Alshibani *et al.* (2023) |
| | Social cognitive theory (Bandura, 1988a; 1988b; 1991) | 1 | Brändle *et al.* (2018) |
| | Schwartz's value orientation theory (Schwartz, 1992; 1994a,b) | 1 | Karpinskaia *et al.* (2023) |
| | Upper echelons theory (Hambrick and Mason, 1984; Hambrick and Pettigrew, 2001) | 1 | Shirokova *et al.* (2023) |
| | Effectuation theory (Sarasvathy, 2001, 2008) | 1 | Sieger *et al.* (2016) |
| | Social legitimacy perspective (Etzioni, 1987; Suchman, 1995). | 1 | Karpinskaia *et al.* (2023) |
| | Resource-based view (RBV) (Barney 1991) | 1 | Karpinskaia *et al.* (2023) |
| **Cluster VI – Country determinants (macro vs micro data) and cross-cultural settings.** | Theory of Planned Behavior (Ajzen,1991) | 4 | Bogatyreva and Shirokova (2017); Beliaeva *et al.* (2017); Shirokova *et al.* (2015; 2016) |
| | Human capital theory (Becker, 1964; Mincer, 1958) | 2 | Knatko *et al.* (2016); Shirokova *et al.* (2015) |
| | Resource-based view (RBV) (Barney 1991) | 2 | Knatko *et al.* (2016); Shirokova *et al.* (2017) |
| | Embeddedness theory (Granovetter, 1992). | 2 | Morris *et al.* (2017); Shirokova *et al.* (2015) |
| | Effectuation theory (Sarasvathy, 2001, 2008) | 1 | Shirokova *et al.* (2017) |
| | Contingency approach (Drazen and Van de Ven 1985, Fry and Smith 1987, Volberda *et al.* 2012) | 1 | Knatko *et al.* (2016) |
| | Social role theory (Eagly and Wood, 1999; Eagly, 1987; Eagly *et al.*, 2000) | 1 | Shirokova *et al.* (2016) |

*Source: Authors' elaboration*



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*Tab. A3: Limitations and Future Research recommendations for each cluster*

| Cluster | Limitations | Future research recommendations |
|---|---|---|
| **1. Socio-demographic characteristics (e.g. gender, age, education level, culture) and entrepreneurial career – paths** | • Focus on limited determinants (e.g., entrepreneurial attitude determinants) and lack of consideration of other potential factors.<br>• Sample biases, including regional overrepresentation (e.g., Ecuador overrepresented) or focus on specific countries (e.g., Hungary, China, Colombia).<br>• Limited external validity due to focus on specific populations (e.g., female business students, university students in Canary Islands, Kazakhstan, etc.).<br>• Data collection and accessibility issues in developing countries, especially in Latin America (e.g., fragmented business demographics data).<br>• Incomplete consideration of relevant socio-cultural and institutional factors (e.g., economic context, university culture).<br>• Study limited to specific age groups (e.g., last-year students, young adults) or educational programmes (e.g., business degrees).<br>• Entrepreneurial education effects not thoroughly examined (e.g., role of education methods, didactics, or parental role models). | • Expand Determinants: Study a broader range of determinants affecting entrepreneurial attitudes (e.g., social networks, subjective vitality, affective commitment).<br>• Cross-Cultural Comparisons: Replicate studies in other regions and countries to test the generalisability of results (e.g., across developing countries in Latin America, beyond Hungary or Colombia).<br>• Address Sample Biases: Broaden the sample to include a more diverse range of students (e.g., non-university students, other university programs).<br>• Entrepreneurial Education: Investigate the impact of educational practices (e.g., teaching methods, classroom innovations) and entrepreneurial education on entrepreneurial outcomes.<br>• Institutional and Economic Context: Delve into how different socio-economic, cultural, and institutional contexts (e.g., economic conditions, university environments) impact entrepreneurial intentions and outcomes.<br>• Broaden Study Populations: Include older populations and professionals to understand entrepreneurial intention formation across different life stages and the factors incentivising the transition from student (nascent entrepreneur) to adult (actual entrepreneur). |



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| Cluster | Limitations | Future research recommendations |
|---|---|---|
| | | • Improve Data Collection in Developing Countries: Facilitate the collection of comprehensive and comparable data in developing countries, addressing issues related to technology and accessibility. |
| **2. Entrepreneurial climate at higher education institutions** | • Measurement issues: Difficulty in measuring complex phenomena like entrepreneurial climate or internationalisation, as well as the limited number of indicators used.<br>• Data limitations: Small sample sizes, data availability, and quality issues in capturing variables at university or regional levels.<br>• Limited scope of entrepreneurship education analysis: The studies focus primarily on the short-term impacts of entrepreneurship education, overlooking the long-term outcomes.<br>• Geographic and contextual limitations: Results are based on specific contexts (e.g., Germany or Vietnam) and might not hold in different cultural or geographic settings. | • Enhanced measurement tools: Developing standardised models and more robust measures for complex phenomena like university internationalisation and entrepreneurial climate, including more detailed EE measures.<br>• Addressing data challenges: Future research should address data availability issues by improving proxies and incorporating control variables at the regional or institutional levels to measure long-term economic and social impacts.<br>• Analysing non-curricular factors: Future studies should consider including additional variables (e.g., family involvement) to capture the full scope of entrepreneurial ecosystems.<br>• Focus on gender and demographic variables: Studies should delve deeper into how gender and regional differences affect entrepreneurship education and outcomes across different contexts.<br>• Investigating cultural influences: Future research could focus on the interaction between university culture, regional factors, and entrepreneurial behaviour, incorporating unobserved contextual influences. |



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| Cluster | Limitations | Future research recommendations |
|---|---|---|
| **3. Family business entrepreneurship** | • Lack of direct measurement of complex dynamics (e.g., social comparison, family social capital)<br>• Limited consideration of contextual (cultural, social, economic) factors (e.g., family social norms, family firm size)<br>• Limited consideration of socio-cognitive processes (e.g., family identity) | • Incorporation of contextual influence<br>• Inclusion of new constructs to directly measure complex dynamics in family firms<br>• Inclusion of new constructs to investigate personality and psychological traits related to family business |
| **4. Multiplicity of contexts and their impact on entrepreneurship** | • Cannot confirm causality due to cross-sectional data<br>• Potential survivor bias (the sample does not contain failed entrepreneurs) and success bias (entrepreneurs who succeeded are likely to respond)<br>• The use of subjective business performance measures (proxies)<br>• The sampling procedure is not truly randomised<br>• Culture-related response bias<br>• Some measures (e.g. family social support and ambidexterity) have limited items that are highly correlated<br>• Some countries have been eliminated from the sample due to issues of incompletion<br>• No data on the student's national origin | • Future longitudinal studies are needed to establish a link between causation, effectuation and ambidextrous behaviour<br>• Further longitudinal research needs to examine "simultaneous" pursuit of causation and effectuation<br>• Comparative studies concerning start-up activities of both students and graduates<br>• Future panel research is needed to illustrate the temporal dynamics of family support and young entrepreneurs' start-up activities<br>• Trend studies (national and international) to examine the impact of culture on rates of engaging in entrepreneurship<br>• Researchers should examine regional gendered cultural differences on entrepreneurship<br>• Using a mixed methodology could assist in minimising cultural bias<br>• Exploration of the gender or country-level impact on the exploitation of the business opportunity e.g. early opportunity identifiers vs followers |



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| Cluster | Limitations | Future research recommendations |
|---|---|---|
| **5. Personality traits (micro-mechanism) and entrepreneurial decision-making logic and behaviors** | • Unbalanced sample sizes across the countries (e.g. in the Anglo-American region sample is too small).<br>• Limited external validity due to focus on specific populations<br>• Small sample sizes limited certain analyses e.g. to analyse how different founder social identities compare to each other<br>• The low continuity of the same respondents across GUESSS waves, preventing a robust within-subject analysis<br>• Lack of studies on geopolitical challenges e.g. macro crises such as refugee crises on entrepreneurship<br>• The use of subjective business performance measures (proxies)<br>• Generalisability issues due to single country sample size | • Given that the Anglo-American region was under-represented, future research could collect more data in the English-speaking countries to validate the findings.<br>• Researchers are encouraged to develop entrepreneurial role identity construct<br>• Complement the GUESSS sample of nascent entrepreneurs with the general adult population of nascent entrepreneurs<br>• Researchers are encouraged to examine the transition from nascent to active entrepreneur status with both shorter and longer time lags<br>• Future panel studies can ascertain the causal change in founders' social identities<br>• Examine meso-level factors e.g. entrepreneurial teams on shaping entrepreneurs' identity<br>• Study the effects of various geopolitical crises e.g. Ukrainian refugees on European entrepreneurship<br>• Alternative firm performance beyond subjective measures<br>• Study mediating effects of narcissism of founders/ a founding team on new venture performance<br>• Study how founders' trend of becoming less narcissistic over time impacts their firm performance<br>• Study generational differences in the dispersion of narcissism |



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| Cluster | Limitations | Future research recommendations |
|---|---|---|
| **6. Country determinants (macro vs micro data) and cross-cultural settings** | • Lacks empirical evidence on student entrepreneurial behaviour in different institutional settings<br>• The research design does not allow for controlling for the temporal aspect of intentions-actions translation<br>• Measurement issues: intentions and actions are measured at the same point in time in the survey<br>• The link between start-up activities engaged in and actual venture launches was not assessed | • Longitudinal studies could establish how the level of institutional change influences young entrepreneurs' choice of causal or/and effectual approaches.<br>• More research into how national culture influences effectual or causal reasoning but one needs to control for the possible national biases<br>• Alternative approaches of operationalising intentions and actions beyond TPB and Liñán and Chen's (2009) entrepreneurial intentions scale and the GEM/PSED actions scale<br>• Study the link between start-up activities and venture launches |
| **Cross-cluster** | • Cross-sectional data<br>• Measurement issues: intentions and actions are measured at the same point in time in the survey<br>• Reliance on self-reported data<br>• Single-method approaches (lack of qualitative analyses)<br>• Common method bias<br>• Self-selection biases in sample recruitment<br>• Use of subjective business performance measures<br>• Unbalanced sample sizes across countries<br>• The research is based on a sample of university students, which reduces the generalisability of the findings.<br>• Several papers do not formulate an explicit research question or a reference framework | • Longitudinal studies<br>• Incorporation of mixed methods<br>• Experimental and quasi-experimental designs<br>• Additional research with alternative measures of firm performance beyond subjective measures<br>• More balanced sample sizes across countries<br>• Complement student sample with general population sample of entrepreneurs |

*Source: Authors' elaboration.*



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## Appendix B – Bibliometric Analyses Sample


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## Appendix C – Sample Descriptive and Performance Statistics

*Tab. C1: Search query in Scopus*

| Search Terms in Scopus | | |
|---|---|---|
| Field Tag | Title, Abstract, and Keywords | TITLE-ABS-KEY("guesss" OR "Global Universit* Entrepr* Spirit* Student* Survey") |
| Boolean | | AND |
| Document Type | Article | LIMIT-TO ( DOCTYPE,"ar" ) |
| Boolean | | AND |
| Publication Year | | PUBYEAR > 1999 |
| Boolean | | AND |
| Language | | LANGUAGE(ENGLISH) |

*Source: Authors' elaboration*

*Tab. C2: Descriptive statistics of resulting publications*

| | |
|---|---|
| *Publications* | 117 |
| *Authors* | 246 |
| *Journals* | 68 |
| *Institutions* | 143 |
| *Countries* | 40 |
| *Cited references* | 8457 |

*Source: Authors' elaboration on search and selection process data.*

*Tab. C3: Distribution of papers in sample by GUESSS waves*

| GUESSS edition | # of papers |
|---|---|
| *2006* | 1 |
| *2008* | 0 |
| *2011* | 24 |
| *2013/2014* | 22 |
| *2016* | 19 |
| *2018* | 27 |
| *2021* | 12 |
| *longitudinal data* | 11 |

*Source: Authors' elaboration.*



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*Tab. C4: Citation analysis of the 15 most relevant documents in the dataset ordered by normalized citations*

| Most influential Papers by normalized citations (Top 15) | Authors | Year | Journal | Citations | Norm. Cit. |
|---|---|---|---|---|---|
| *Business model innovation and young firm performance: the role of founder personality* | Veksler K., Dvorkina D., Amarantov I., Shirokova G., Bodolica V. | 2024 | IEEE Transactions on Engineering Management | 12 | 46.67 |
| *When do entrepreneurial intentions lead to actions? The role of national culture* | Bogatyreva K., Edelman L.F., Manolova T.S., Osiyevskyy O., Shirokova G. | 2019 | Journal of Business Research | 135 | 44.34 |
| *What drives university engineering students to become entrepreneurs? finding different recipes using a configuration approach* | Rippa P., Ferruzzi G., Holienka M., Capaldo G., Coduras A. | 2023 | Journal of Small Business Management | 15 | 43.13 |
| *A chip off the old block? The role of dominance and parental entrepreneurship for entrepreneurial intention* | Palmer C., Fasbender U., Kraus S., Birkner S., Kailer N. | 2021 | Review of Managerial Science | 54 | 35.56 |
| *Get it together! Synergistic effects of causal and effectual decision-making logics on venture performance* | Smolka K.M., Verheul I., Burmeister-Lamp K., Heugens P.P.M.A.R. | 2018 | Entrepreneurship: Theory and Practice | 155 | 29.97 |



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| Most influential Papers by normalized citations (Top 15) | Authors | Year | Journal | Citations | Norm. Cit. |
|---|---|---|---|---|---|
| *The impact of entrepreneurship education on university students' entrepreneurial skills: a family embeddedness perspective* | Hahn D., Minola T., Bosio G., Cassia L. | 2020 | Small Business Economics | 97 | 29.39 |
| *The impact of entrepreneurship education on the entrepreneurial intention of students in science and engineering versus business studies university programs* | Maresch D., Harms R., Kailer N., Wimmer-Wurm B. | 2016 | Technological Forecasting and Social Change | 342 | 28.85 |
| *Women entrepreneurs' progress in the venturing process: the impact of risk aversion and culture* | Gimenez-Jimenez D., Edelman L.F., Dawson A., Calabrò A. | 2022 | Small Business Economics | 26 | 27.61 |
| *Exploring the intention–behavior link in student entrepreneurship: Moderating effects of individual and environmental characteristics* | Shirokova G., Osiyevskyy O., Bogatyreva K. | 2016 | European Management Journal | 313 | 26.41 |



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| Most influential Papers by normalized citations (Top 15) | Authors | Year | Journal | Citations | Norm. Cit. |
|---|---|---|---|---|---|
| *Promoting entrepreneurship based on university students' perceptions of entrepreneurial attitude, university environment, entrepreneurial culture and entrepreneurial training* | Valencia-Arias A., Arango-Botero D., Sánchez-Torres J.A. | 2022 | Higher Education, Skills and Work-Based Learning | 24 | 25.49 |
| *An intergeneration solidarity perspective on succession intentions in family firms* | Gimenez-Jimenez D., Edelman L.F., Minola T., Calabrò A., Cassia L. | 2021 | Entrepreneurship: Theory and Practice | 38 | 25.02 |
| *Student entrepreneurship and the university ecosystem: a multi-country empirical exploration* | Morris M.H., Shirokova G., Tsukanova T. | 2017 | European Journal of International Management | 95 | 23.68 |
| *National culture, effectuation, and new venture performance: global evidence from student entrepreneurs* | Laskovaia A., Shirokova G., Morris M.H. | 2017 | Small Business Economics | 87 | 21.68 |
| *The climate for entrepreneurship at higher education institutions* | Bergmann H., Geissler M., Hundt C., Grave B. | 2018 | Research Policy | 111 | 21.46 |
| *The influence of university entrepreneurship-oriented training in the transformation of intentions into new businesses* | Sancho M.P.L., Ramos-Rodríguez A.R., Frende Vega M.D.L.á. | 2022 | International Journal of Management Education | 19 | 20.18 |

*Source: Authors' elaboration on SCOPUS data.*



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*Tab. C5: Top 15 countries and territories in terms of publication activity*

| Most prolific Countries (Top 15) | Papers in the sample |
|---|---|
| *Russian Federation* | 19 |
| *United States of America* | 15 |
| *Germany, Italy, Spain, Switzerland* | 13 |
| *Colombia* | 12 |
| *France* | 9 |
| *Netherlands* | 7 |
| *Canada, Hungary* | 6 |
| *Costa Rica, Sweden, United Kingdom* | 5 |
| *Chile, Slovakia* | 4 |

*Source: Authors' elaboration on SCOPUS data.*



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*Tab. C6: Top 15 institutions in terms of publication activity.*

| **Most prolific Institutions (Top 15)** | **Papers in the sample** |
|---|---|
| *Graduate School of Management – St. Petersburg State University* | 26 |
| *Università degli Studi di Bergamo* | 13 |
| *University of St. Gallen* | 9 |
| *Rotterdam School of Management – Erasmus University* | 8 |
| *Miskolci Egyetem,*<br>*University of Bern,*<br>*HSE University,*<br>*Instituto Tecnológico de Costa Rica,*<br>*Bentley University* | 6 |
| *Universidad de Cádiz,*<br>*Universidad de Medellín* | 5 |
| *Univerzita Komenského v Bratislave,*<br>*Universidad EAFIT* | 4 |
| *University of Calgary,*<br>*Universidad de la Laguna,*<br>*University of Florida,*<br>*Jönköping University,*<br>*Technische Universität München,*<br>*Universitat Autònoma de Barcelona,*<br>*Universidad Católica del Norte,*<br>*Princess Nourah Bint Abdulrahman University,*<br>*Montpellier Business School,*<br>*Warrington College of Business,*<br>*Haskayne School of Business* | 3 |

*Source: Authors' elaboration on SCOPUS data.*



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*Tab. C7: Top 15 authors in terms of publication activity.*

| Most prolific Authors (Top 15) | Papers in the sample |
|---|---|
| *Shirokova, G.* | 19 |
| *Minola, T.* | 10 |
| *Sieger, P.* | 9 |
| *Bogatyreva, K.* | 7 |
| *Edelman, L.F.,*<br>*Gubik, A.S.,*<br>*Hahn, D.,*<br>*Leiva, J.C.* | 6 |
| *Bergmann, H.* | 5 |
| *Cano, J.A.,*<br>*Holienka, M.,*<br>*Mora-Esquivel, R.,*<br>*Morris, M.H.,*<br>*Osiyevskyy, O.,*<br>*Ramos-Rodríguez, A.R.,*<br>*Tabares, A.,*<br>*Tsukanova, T.* | 4 |

*Source: Authors' elaboration on SCOPUS data.*



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*Tab. C8: Top 15 journals in terms of publication activity.*

| **Most prolific Journals (Top 15)** | **Papers in the sample** |
|---|---|
| *Small Business Economics* | 10 |
| *Entrepreneurship and Regional Development* | 5 |
| *Academia Revista Latinoamericana De Administracion,*<br>*Entrepreneurship Research Journal,*<br>*Espacios,*<br>*Journal of Business Venturing,*<br>*Journal of Small Business Management* | 4 |
| *Entrepreneurial Business and Economics Review,*<br>*Entrepreneurship Theory and Practice,*<br>*International Journal of Management Education,*<br>*Journal of Business Research,*<br>*Studies in Higher Education* | 3 |
| *Danube,*<br>*European Journal of International Management,*<br>*Higher Education Skills and Work Based Learning,*<br>*International Entrepreneurship and Management Journal,*<br>*International Journal of Entrepreneurial Venturing,*<br>*International Small Business Journal,*<br>*Researching Entrepreneurship,*<br>*Journal of Business Venturing Insights,*<br>*Journal of Entrepreneurship in Emerging Economies,*<br>*Journal of Technology Transfer*<br>*Management Research,*<br>*Technological Forecasting and Social Change* | 2 |

*Source: Authors' elaboration on SCOPUS data.*



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*Tab. C9: Top 15 journals in terms of global citations*

| Most cited Journals (Top 15) | Citations | Number of papers | Citations per paper |
|---|---|---|---|
| *Journal of Business Venturing* | 1042 | 4 | 260.5 |
| *Small Business Economics* | 645 | 10 | 64.5 |
| *Technological Forecasting and Social Change* | 355 | 2 | 177.5 |
| *European Management Journal* | 313 | 1 | 313 |
| *Entrepreneurship: Theory and Practice* | 230 | 3 | 76.67 |
| *Journal of Small Business Management* | 224 | 4 | 56 |
| *Journal of Technology Transfer* | 190 | 2 | 95 |
| *Journal of Business Research* | 168 | 3 | 56 |
| *Entrepreneurship and Regional Development* | 137 | 5 | 27.4 |
| *European Journal of International Management* | 116 | 2 | 58 |
| *Research Policy* | 111 | 1 | 111 |
| *Journal of Business Venturing Insights* | 96 | 2 | 48 |
| *European Journal of Epidemiology* | 58 | 1 | 58 |
| *Journal of Entrepreneurship in Emerging Economies* | 55 | 2 | 27.5 |
| *Review of Managerial Science* | 54 | 1 | 54 |

*Source: Authors' elaboration on SCOPUS data.*



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*Tab. C10: Top 15 journals by impact factor and ranking (H-INDEX, SJR, ABS / AJG).*

| Most influential Journals by impact factor (Top 15) | Citations | H-INDEX | SJR (June 2024) | ABS / AJG (2024) |
|---|---|---|---|---|
| *Research Policy* | 111 | 289 | 3.22 | 4* |
| *Journal of Business Research* | 168 | 265 | 3.13 | 3 |
| *Journal of Business Venturing* | 1042 | 224 | 4.81 | 4* |
| *Entrepreneurship: Theory and Practice* | 230 | 198 | 5.82 | 4* |
| *Technological Forecasting and Social Change* | 355 | 179 | 3.12 | 3 |
| *Sustainability* | 2 | 169 | 0.67 | / |
| *Small Business Economics* | 645 | 167 | 2.53 | 3 |
| *European Journal of Epidemiology* | 58 | 138 | 3.19 | / |
| *Journal of Small Business Management* | 224 | 132 | 1.63 | 3 |
| *Studies in Higher Education* | 43 | 129 | 1.61 | 3 |
| *International Journal of Contemporary Hospitality Management* | 47 | 126 | 2.84 | 3 |
| *European Management Journal* | 313 | 124 | 1.79 | 2 |
| *International Small Business Journal* | 50 | 113 | 1.96 | 3 |
| *Entrepreneurship and Regional Development* | 137 | 112 | 1.37 | 3 |
| *IEEE Transactions on Engineering Management* | 12 | 112 | 1.2 | 3 |

*Source: Authors' elaboration on the latest available SJR and ABS / AJG data.*



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# Family-Type Entrepreneurship and Territorial Memory in Marginalised Rural Areas: A Qualitative Case Study from the Italian Natural Wine Sector

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**Abstract**

This paper examines how entrepreneurial actors mobilise territorial memory, socioemotional wealth, and stewardship orientations to generate entrepreneurial innovation in historically marginalised rural areas. Drawing on a qualitative single case study of *Fra i Monti* – an organic winery founded in 2018 in Terelle, a mountain village in the province of Frosinone, Italy – and applying the Gioia methodology, the paper develops a hybrid theoretical framework integrating socioemotional wealth, familiness, stewardship theory, and the business history perspective on Italian family enterprise. The analysis advances three theoretically grounded propositions: that territorial memory may function as the primary resource of socioemotional wealth in the absence of an existing family firm; that heritage knowledge may constitute a form of familiness that is territorially rather than genealogically constituted; and that stewardship orientation produces a business model compatible with the premium positioning logic of artisanal, place-based markets. The paper contributes to family business and rural entrepreneurship literatures by introducing territorial memory as an analytical concept bridging identity, idiosyncratic resources, and long-term stewardship in contexts of historical discontinuity.

*Keywords:* Territorial memory; socioemotional wealth; family-type entrepreneurship; stewardship theory; Gioia methodology; Italian internal rural areas

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*Imprenditorialità di tipo familiare e memoria territoriale nelle aree rurali marginalizzate: lo studio qualitativo di un caso aziendale nel settore italiano del vino naturale*

**Sommario**

Il presente articolo esamina come attori imprenditoriali mobilizzino la memoria territoriale, il socioemotional wealth e gli orientamenti alla stewardship per generare innovazione imprenditoriale nelle aree rurali interne storicamente marginalizzate. Attraverso un caso di studio qualitativo su *Fra i Monti* – una cantina di produzione biologica fondata nel 2018 a Terelle, in provincia di Frosinone – e applicando la Gioia methodology, il paper sviluppa un framework teorico ibrido che integra il socioemotional wealth, la familiness, la stewardship theory e la prospettiva della business history sull'impresa familiare italiana. L'analisi avanza tre proposizioni teoricamente fondate: che la memoria territoriale possa fungere da risorsa primaria del socioemotional wealth in assenza di un'impresa familiare preesistente; che la heritage knowledge possa costituire una forma di familiness di carattere territoriale piuttosto che genealogico; e che l'orientamento alla stewardship produca un business model compatibile con la logica di posizionamento premium dei mercati artigianali e place-based. Il paper contribuisce alle letterature sul family business e sull'imprenditorialità rurale introducendo la memoria territoriale come concetto analitico che connette identità, risorse idiosincratiche e orientamento di lungo periodo in contesti di discontinuità storica.

*Parole chiave:* Memoria territoriale; socioemotional wealth; imprenditorialità familiare; stewardship theory; metodologia Gioia; aree rurali interne italiane

## 1. Introduction

Over the past three decades, the literature on family business has developed increasingly refined analytical tools for understanding how family-owned and family-managed firms behave, make decisions, and sustain themselves across generations. Concepts such as socioemotional wealth (Gómez-Mejía *et al*., 2007; Berrone *et al*., 2012), familiness (Habbershon and Williams, 1999), and stewardship orientation (Davis *et al*., 1997; Miller and Le Breton-Miller, 2005) have significantly advanced our capacity to explain why family firms often pursue goals that deviate from profit maximisation, privileging instead long-term continuity, territorial embeddedness, and the preservation of identity-laden resources. Yet this literature has been developed predominantly in reference to established firms, operating in institutionally stable environments, and studied through a largely synchronic lens (De Massis and Kotlar, 2014; Ramírez-Pasillas *et al*., 2021). We know a



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great deal about how family businesses survive and transmit themselves across generations; we know considerably less about how they emerge – or re-emerge – in conditions of historical discontinuity, economic marginalisation, and the near-total erosion of prior entrepreneurial traditions.

This gap is not merely empirical but theoretical. The canonical models of family business assume the existence of a firm, a family, and a succession dynamic to be managed. They are ill-equipped to account for situations in which the entrepreneurial act itself consists in reconstructing what has been lost: recovering suppressed agricultural knowledge, reactivating abandoned land, and reconstituting a territorial identity that decades of rural exodus and industrial monoculture have all but destroyed. These are precisely the conditions that characterise large portions of Italy's internal rural areas – the so-called aree interne – where depopulation, de-agrarianisation, and infrastructural neglect have produced landscapes of both ecological and entrepreneurial abandonment (Barca *et al.*, 2012).

Understanding how entrepreneurship re-emerges in such contexts requires moving beyond standard models of opportunity recognition and resource mobilisation. The deeper question is how actors who share a biographical and affective connection to a marginalised territory transform that connection into an entrepreneurial resource – and how the historical rupture that emptied the place of people and practices becomes, paradoxically, the source of a distinctive competitive advantage.

It is in this context that the present paper examines the case of *Fra i Monti*, a natural winery founded in 2018 in Terelle, a small village in the province of Frosinone, approximately 90 kilometres southeast of Rome, at nearly one thousand metres above sea level. The winery was established by Rocco Toti and the brothers Benedetto and Francesco Leone – friends rooted in the same territory, sharing the same memory of a place progressively emptied of people, practices, and meaning. Their entrepreneurial project – recovering ancient indigenous grape varieties, practising high-altitude organic viticulture, and building international networks for natural wine – cannot be adequately understood through the lens of conventional entrepreneurship theory, nor through the standard framework of rural development policy. It is, we argue, most productively read as a case of family-type entrepreneurship: not in the strict genealogical sense, but in the deeper analytical sense developed by the family business literature – an enterprise animated by socioemotional wealth, stewardship orientations, and idiosyncratic resources whose distinctiveness derives precisely from their territorial and relational specificity.

This leads to the specific question guiding the empirical analysis. We ask how family-type entrepreneurial actors mobilise territorial memory, socioemotional wealth, and stewardship orientations to generate entrepreneurial



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innovation in historically marginalised rural areas, and what a long-term historical perspective adds to the understanding of this process that synchronic management frameworks cannot capture. We address this question through a qualitative single case study of *Fra i Monti*, analysed using the Gioia methodology (Gioia *et al*., 2013), which allows us to move systematically from the informant's own language to theoretical constructs.

Third, the paper demonstrates that a business history perspective – specifically the long-term perspective developed by Colli (2003) on Italian family entrepreneurship – is not merely contextual background but an analytically necessary component for understanding entrepreneurship from discontinuity: without the historical rupture of the 1960s–1970s industrialisation, the distinctive competitive advantage of *Fra i Monti* would be analytically invisible.

The paper is organised as follows. Section 2 develops the theoretical framework and elaborates the research questions introduced above. Section 3 describes the methodology. Section 4 presents and discusses the findings. Section 5 draws conclusions and identifies avenues for future research.

## 2. Theoretical Framework and Literature Review

### *2.1 Family Business in Marginalised Rural Contexts: A Research Gap*

While family firms constitute the dominant organisational form in rural agricultural settings (Nordqvist and Melin, 2010; Discua Cruz *et al*., 2013), the majority of this literature addresses firms that are already constituted — with an existing asset base, a recognisable succession dynamic, and an institutional environment that, however challenging, provides some degree of continuity.

Far less attention has been devoted to what might be called entrepreneurship from discontinuity: the process through which new entrepreneurial actors, in the absence of prior firm structures, family inheritance, or functioning local markets, reconstruct economic activity in contexts of deep historical rupture. This is the condition of Italy's internal rural areas, where industrialisation in the 1960s and 1970s produced a systematic abandonment of agricultural traditions, depopulation of mountain and hill communities, and the progressive disappearance of tacit knowledge accumulated over centuries of peasant farming (Barca *et al*., 2012; De Rossi, 2018).

Before proceeding, a definitional clarification is necessary. Throughout this paper we use the term family-type entrepreneurship to refer not to a structural category defined by ownership or biological kinship, but to a



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behavioural one, following Chua, Chrisman and Sharma (1999), who propose that the family business is most productively defined by what it does rather than by who owns it. Specifically, family-type entrepreneurship is characterised by centralised decision-making among a small group of deeply aligned actors, a shared value system prioritising long-term continuity over short-term return, relational embeddedness in a specific social and territorial context, and a governance logic driven by stewardship rather than agency. *Fra i Monti* exhibits all four dimensions despite the absence of biological kinship among its founders – a qualification that makes the application of family business constructs analytically justified rather than merely analogical.

### *2.2 Socioemotional Wealth: Beyond the Profit Motive*

The concept of socioemotional wealth (SEW), introduced by Gómez-Mejía *et al*. (2007) and subsequently elaborated by Berrone, Cruz and Gómez-Mejía (2012), refers to the non-financial aspects of a firm that meet the family's affective requirements, including family control and influence, identification of family members with the firm, binding social ties, emotional attachment to the firm, and the renewal of family bonds through dynastic succession – summarised in the FIBER acronym. The central argument is that family firms often make decisions that sacrifice financial performance in order to preserve SEW, particularly when the SEW reference point is threatened.

Applied to the case of *Fra i Monti*, the SEW framework generates immediate analytical purchase, but with an important extension: SEW is not inherited but constructed through the entrepreneurial act itself, with emotional attachment to a place – rather than to an existing firm – as its primary reference point. This extension is analytically justified rather than merely analogical: SEW and familiness are not constructs imported from a different domain but explanatory mechanisms that identify the motivational logic and resource configuration through which a territorial condition is translated into entrepreneurial action – something that the concept of territorial embeddedness alone, however powerful as a contextual descriptor, cannot capture. The empirical demonstration of this extension is developed in Section 4.2.



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## *2.3 Familiness and the Resources of Place*

The concept of familiness, developed by Habbershon and Williams (1999) and subsequently refined by Habbershon, Williams and MacMillan (2003) and Zellweger, Eddleston and Kellermanns (2010), refers to the idiosyncratic bundle of resources and capabilities arising from the interaction of family, individual family members, and the firm. Familiness constitutes a potential source of competitive advantage precisely because it is non-replicable: it emerges from the specific history, relationships, and values of a particular family-firm system and cannot be straightforwardly transferred or imitated.

In the case of *Fra i Monti*, familiness operates in its extended, territory-anchored form through three resource clusters – heritage knowledge, relational legitimacy, and territorial embeddedness — each analysed empirically in Section 4.4.

## *2.4 Stewardship Theory and the Long-Term Horizon*

Stewardship theory, introduced by Davis, Schoorman and Donaldson (1997) and applied to family business by Miller and Le Breton-Miller (2005), posits that in certain organisational configurations, actors behave as stewards rather than agents – motivated not by self-interest but by intrinsic satisfaction derived from achieving collective goals and by identification with the organisation and its mission. Steward behaviour is associated with long time horizons, community orientation, and a willingness to forgo short-term personal gain for the preservation and enhancement of the collective patrimony entrusted to their care.

Miller and Le Breton-Miller (2005) identify community-building, continuity, and connection as the three core dimensions of stewardship in family firms – all three demonstrably present in the *Fra i Monti* case, as Section 4.3 shows, with the qualification that community extends beyond the firm to encompass the territory.

## *2.5 The Business History Perspective: Colli and the Long View*

Andrea Colli, in his foundational work on the history of family business (Colli, 2003; Colli and Rose, 2003), has argued that family firms cannot be adequately understood without attention to the institutional, cultural, and economic contexts that shape their emergence, persistence, and



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transformation over time. The Italian case is particularly instructive: the predominance of family capitalism in Italy is not a deviation from a supposed Anglo-Saxon norm but an adaptive response to specific institutional conditions – fragmented financial markets, weak contractual enforcement, strong regional identities, and dense social networks that substitute for formal institutional infrastructure. In the Italian internal rural areas, these conditions have historically made family-based agricultural enterprise the default organisational form for managing collective resources, transmitting knowledge, and sustaining community cohesion.

The industrialisation of the 1960s and 1970s constituted a rupture in this long-standing pattern. The Fordist factory – in the case of Terelle, the Fiat/Stellantis automotive plant at Cassino – offered an economic alternative that was superior in the short term but culturally and ecologically destructive in the long term. What was lost was not merely the physical labour of farming but the entire ecosystem of tacit knowledge, intergenerational transmission, and territorial identity that family-based agricultural enterprise had sustained for centuries. The recovery attempted by *Fra i Monti* operates on two temporal scales: a start-up winery navigating the contemporary natural wine market that is an emerging niche, and simultaneously an attempt to reconnect with a tradition interrupted half a century ago.

## *2.6 Synthesising the Framework: Territorial Memory as the Analytical Bridge*

The four theoretical pillars converge on a concept that is not explicitly developed in any single one of them but that the case of *Fra i Monti* places at the centre of the analysis: territorial memory as an entrepreneurial resource. Before defining it, we situate it in relation to three constructs with which it shares important features but from which it differs in analytically significant ways. The first is collective memory in the Halbwachsian sense (Halbwachs, 1992): socially shared recollections that are always selective and reconstructed in the present by groups whose current interests shape what is remembered and what is forgotten. Territorial memory shares this collective and reconstructive character, but is more specifically anchored to productive and ecological practices – the knowledge of how to cultivate a specific variety, the memory of how a particular terrace was managed – rather than to narrative or symbolic traditions alone. The second is place attachment (Scannell and Gifford, 2010; Lewicka, 2011): the affective, cognitive, and behavioural bond between individuals and specific spatial settings. Where place attachment explains motivation at the individual-psychological



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level, territorial memory operates at the intergenerational and community level – it is less about how Rocco Toti feels about Terelle and more about what Terelle has accumulated across generations of farming practice. The third is territorial capital (Camagni, 2008): the stock of tangible and intangible localised assets constituting a territory's development potential. Territorial memory differs from territorial capital in a crucial respect: it captures the dimension of loss and recovery that a stock concept cannot accommodate. Where historical rupture has degraded or fragmented the asset base, territorial memory is precisely the partially surviving residue that can be remobilised through deliberate entrepreneurial effort. Territorial memory, then, is the accumulated stock of place-specific productive knowledge, ecological practices, affective attachments, and identity narratives associated with a particular geographical and ecological context, which persists in degraded, fragmented, and often tacit form after the economic and social activities that originally produced it have been discontinued, and which can be selectively reconstructed and mobilised as a strategic resource by entrepreneurial actors who share a sufficient affective and biographical connection to the territory.

A note on the relationship between these constructs and the broader concept of territorial embeddedness is warranted here. Territorial embeddedness – as developed in economic sociology and regional studies – describes the relational and locational anchoring of economic actors in a specific place. It is a powerful contextual descriptor but operates primarily at the level of condition: it tells us that actors are embedded, but does not explain the motivational logic that drives their choices, the specific character of the resources they mobilise, or the governance orientation that shapes their enterprise. SEW, familiness, and stewardship theory do precisely this: they identify the mechanisms through which a territorial condition is translated into distinctive entrepreneurial motivations, idiosyncratic resource configurations, and long-term governance orientations.

In the *Fra i Monti* case, territorial memory functions as the primary entrepreneurial resource, motivating the initial project, guiding the technical choices, legitimising the social positioning, and orienting the long-term vision – as Sections 4.2 to 4.5 demonstrate.

These considerations generate the research questions guiding the empirical analysis. The main question asks how family-type entrepreneurial actors mobilise territorial memory, socioemotional wealth, and stewardship orientations to generate entrepreneurial innovation in historically marginalised rural areas, and what a long-term historical perspective adds to this understanding. Two subsidiary questions address, respectively, the idiosyncratic resources that entrepreneurial actors draw upon when reconstructing economic activity in peripheral contexts, and the extent to which non-economic



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motivations drive entrepreneurial choices when conventional economic incentives are absent or insufficient.

In Section 4.6, these four dimensions are integrated through the lens of Teece's (2010) value creation / value capture / value delivery framework, which we apply to show how the stewardship orientation shapes all three dimensions of the *Fra i Monti* business model in ways that are inseparable from its identity and territorial logic – and that cannot be explained by conventional models of entrepreneurial value generation.

## 3. Research Design and Methodology

### *3.1 Epistemological Positioning*

This paper adopts an interpretive epistemological stance, treating organisational and entrepreneurial phenomena – particularly those pertaining identity, memory, and place – as best understood through their meanings and contexts rather than by standardised indicators (Johnson *et al*., 2006; Cornelissen, 2017). Additionally, It takes a historical-processual orientation (Colli, 2003; Suddaby *et al*., 2014), considering the entrepreneurial configuration under investigation as a moment in a longer trajectory of rupture, loss, and partial recovery – a temporal depth that synchronic frameworks are unable to provide.

### *3.2 Case Study Design: Rationale and Justification*

The primary research method is the qualitative single case study, in the tradition established by Yin (2014) and theoretically elaborated by Eisenhardt and Graebner (2007). The case study is widely recognised as the method of choice when the research questions are of the 'how' and 'why' type; when the investigator has little or no control over events; and when the focus is on a contemporary phenomenon within its real-life context (Yin, 2014).

The choice of a single rather than multiple case design reflects both theoretical and practical considerations. Theoretically, the *Fra i Monti* case is what Yin (2014) calls a revelatory case: it offers access to a phenomenon – the re-emergence of family-type entrepreneurship in a context of deep historical rupture and territorial marginalisation – that has not previously been systematically documented or theorised in the family business literature. A revelatory case justifies single-case analysis because its value lies precisely



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in the depth of insight it can generate, not in its typicality relative to a broader population.

This paper claims analytical rather than statistical generalisation (Yin, 2014; Eisenhardt and Graebner, 2007): the mechanisms identified – territorial memory as SEW resource, familiness of place, stewardship orientation, and the long-term historical perspective developed by Colli (2003) – are theoretically transferable to other contexts sharing the same structural conditions of historical discontinuity and identity-based entrepreneurship, independently of empirical representativeness. The boundary conditions governing this transferability are discussed in Section 5.2.

### *3.3 Case Selection*

The *Fra i Monti* winery was selected through a combination of purposive and criterion-based sampling (Patton and Appelbaum, 2003). Four criteria guided the selection. First, theoretical relevance: the case had to exhibit the theoretical constructs under examination while simultaneously challenging their conventional formulations. Second, contextual specificity: the case had to be embedded in a documented context of historical marginalisation and rural depopulation. Third, empirical accessibility: the case had to be accessible through direct fieldwork. Fourth, information richness: in Patton's (2002) terms, the case had to be an information-rich case from which a great deal can be learned about the research questions. The combination of an articulate, reflexive protagonist, a well-documented territorial context, and a distinctive entrepreneurial trajectory makes *Fra i Monti* exceptionally information-rich for the purposes of this study.

### *3.4 Data Collection*

Data collection proceeded through three complementary sources, all gathered during a single field visit to Terelle on 17 February 2026. The primary source was a semi-structured interview conducted with Rocco Toti, co-founder and head of production at *Fra i Monti*. The interview followed a thematic guide organised around: the origins and motivations of the entrepreneurial project; the role of territorial memory and personal biography; the technical and ecological choices in viticulture and winemaking; the construction of commercial networks and international positioning; and the relationship between the winery and the broader territorial community. The interview was conducted in Italian, recorded with the interviewee's consent,



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transcribed, and translated. The secondary source was field observation conducted during an on-site visit to the winery and vineyards in Terelle. The tertiary source comprised documentary and contextual data including demographic data on the municipality of Terelle (ISTAT), publicly available information on the winery's commercial activities, and secondary literature on the natural wine market and the agrifood economy of Italy's internal rural areas.

A note on limitations is appropriate. The empirical foundation of this paper rests primarily on a single interview with one of the three co-founders. Triangulation through interviews with Benedetto and Francesco Leone would strengthen the analytical robustness of the findings. These limitations, and their theoretical implications, are discussed more fully in Section 5.2.

### *3.5 Data Analysis*

Data analysis followed the three-stage approach proposed by Gioia, Corley and Hamilton (2013) for qualitative inductive research, guided by an abductive logic (Alvesson and Kärreman, 2011) and sensitising concepts (Blumer, 1954). In the first stage, the interview transcript was read in its entirety and annotated to identify recurrent themes in the informant's own language – first-order codes staying close to the empirical material without imposing theoretical categories. In the second stage, first-order codes were aggregated into eight second-order themes through iterative movement between the empirical material and the theoretical framework (see Table 1). In the third stage, second-order themes were aggregated into four overarching dimensions – territorial memory as entrepreneurial resource; socioemotional wealth without a family firm; stewardship orientation; and historical rupture and path dependence – that correspond to the theoretical pillars of the framework while reflecting the specific configuration of the case. It is at this stage that the concept of territorial memory emerged as the organising construct that bridges the other three dimensions: not as a pre-existing category brought to the data, but as an analytical response to the empirical material's insistence on a dimension of historical rupture and recovery that the pre-existing constructs were unable to support on their own.



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*Table 1: Data structure: from first-order codes to aggregate dimensions (Gioia* et al.*, 2013)*

| First-order codes (in informant's language) | Second-order themes | Aggregate dimensions |
|---|---|---|
| • *"We wanted to bring that place back to life" [the Cerquella]*<br>• *"We wanted to try making wine to leave a mark on our territory"*<br>• *"In Terelle you cannot not do something — it is a mission"* | Place as affective and moral imperative | TERRITORIAL MEMORY AS ENTREPRE-NEURIAL RE-SOURCE |
| • *"The seed of the historical potato variety of Terelle has been lost. Incredible"*<br>• *"Terelle once had over 100 hectares of chest-nut grove. All of this has disappeared"*<br>• *"The metal-mezzadro abandons the land both physically and mentally"* | Historical rupture and loss of productive knowledge | |
| • *"Semillon and Maturano: two varieties that speak of our territory"*<br>• *"A historical variety (150/200 years old) — it was a local vinegrape"*<br>• *"Four indigenous varieties of the Valle di Comino: Lecinaro, Pampanaro, Semillon and Maturano"* | Recovery of sup-pressed heritage knowledge through indigenous varieties | |
| • *"Terroir... must be extended to what is made with one's hands, to the entire tradition of a community"*<br>• *"It serves to preserve the place, the identity of the territory"* | Territorial identity as productive and com-mercial asset | |
| • *"Around 2008 we decided to do something... we organised painting festivals, readings"*<br>• *"We were driven by a desire for discovery"*<br>• *"We were both born in 1984. We have always shared a passion for food and wine"* | Shared biographical and affective bond preceding the enter-prise | SOCIOEMO-TIONAL WEALTH WITHOUT A FAMILY FIRM |
| • *"The trace was La Cerquella, a venue built by Benedetto's father, who then died"*<br>• *"We wanted to bring that place back to life"* | Emotional attachment to a specific place as SEW reference point | |
| • *"We had no prior experience: we were just bottle-openers"*<br>• *"We started travelling and learning. From the very beginning interested in wines that express the territory"*<br>• *"We wanted to open up, to learn. Not to re-main closed"* | Identity construction through entrepreneurial act ra-ther than inheritance | |



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| First-order codes (in informant's language) | Second-order themes | Aggregate dimensions |
|---|---|---|
| • *"Madame Leroy: my wines do not taste of Pinot Noir but of Burgundy. It is a priority to carry the place forward"*<br>• *"Ciociaria Naturale: a network to attract visitors and consumers for the product. You give something that brings you a return"*<br>• *"It is necessary to learn to taste your neighbour's wine"* | Community stewardship: collective territorial promotion over individual competition | STEWARDSHIP ORIENTATION |
| • *"In 2017 we chose to make wine in amphorae when stainless steel was dominant"*<br>• *"We rejected the DOC Atina-Cabernet with our label Rivoluzione Cabernicana"*<br>• *"This approach does not contemplate industrial methods: the highest quality"* | Deliberate rejection of industrial and standardised production norms | |
| • *"Through wine production, we try to bring people back to Terelle"*<br>• *"Agricultural sustainability, wine tourism, producing for proximity but also for the world"*<br>• *"Good and beautiful have an ethical value"* | Long-term territorial revitalisation as strategic goal | |
| • *"The Cassino automotive plant in 1972 had 12,000 employees. 80% moved to the city"*<br>• *"The metal-mezzadro without a VAT number roams the woods but cannot sell the product"*<br>• *"Those who worked in the factory grew their own vegetables, oil, tomatoes. That knowledge has been dispersed"* | Industrial rupture and destruction of agricultural identity | HISTORICAL RUPTURE AND PATH DEPENDENCE |
| • *"Semillon and Maturano: DNA reconstruction analysis of the 2000s, replicable plants"*<br>• *"Semillon blanc was planted by Count Visocchi... minister of the Kingdom of the Two Sicilies"*<br>• *"First traces of Bordeaux varieties in Italy"* | Recovery of biological and historical heritage through agronomy and viticulture | |
| • *"Nobody has built a truffle grove... you have to go to market. There has been no entrepreneurial culture"*<br>• *"There are closed wine areas, wonderful terroirs and stories, and operators who do not evolve"*<br>• *"Irpinia still today cannot find its own dimension"* | Absence of entrepreneurial culture as structural constraint and counter-examples | |

*Source: interview with Rocco Toti, 17 February 2026.*
*First-order codes translated from Italian by the authors.*



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### *3.6 Rigor, Validity, and Reflexivity*

Qualitative research of this kind requires explicit attention to rigor, transparency, reflexivity, validity, and generalizability (Johnson *et al*., 2006; Cunliffe, 2003). We address each one separately. Rigor in qualitative research refers to the consistency and care with which the analytical process is conducted and documented (Johnson *et al*., 2006). In this study, rigor is ensured through the systematic three-stage Gioia methodology, the explicit mapping of first-order codes to second-order themes and aggregate dimensions presented in Table 1, and the iterative movement between empirical material and theoretical framework described in Section 3.5. This approach has been successfully applied in qualitative family business research, including case studies of Italian family firms (Dalpiaz, Tracey and Phillips, 2014), confirming its appropriateness for the type of analysis conducted here. Transparency is achieved through the data structure figure itself, which makes the analytical pathway from informant language to theoretical constructs visible and traceable by the reader. Regarding validity, we differentiate between two types. Internal validity – the coherence between evidence and interpretation – is addressed through the systematic use of direct quotations anchored to specific analytical claims throughout Sections 4.2–4.5. External validity is not claimed in the statistical sense; rather, we pursue analytical generalisation (Yin, 2014), whereby the theoretical mechanisms identified – territorial memory as SEW resource, familiness of place, stewardship-driven business model – are theoretically transferable to other contexts sharing the structural conditions of historical discontinuity and territorial marginalisation, independently of empirical representativeness. On generalizability, the boundary conditions of the three propositions are discussed explicitly in Section 5.2. Reflexivity concerns the systematic reflection on how the researchers' positionality shapes the research process and its outputs (Cunliffe, 2003). Both authors approach the case from an academic position external to the territory, with no prior acquaintance with the protagonists. This exteriority enables theoretical distance while precluding the depth of contextual understanding that insider knowledge can provide – a trade-off we acknowledge as constitutive of the study's epistemological stance. One author approaches the case as an economic historian, bringing a long-term contextual perspective that is unusual in management studies but theoretically generative for the purposes of this paper; the other brings expertise in qualitative business research and corporate governance. This disciplinary complementarity is reflected in the hybrid framework: the business history perspective provides temporal depth, while the management studies perspective ensures analytical rigour in the application of family business constructs. The interview was conducted with



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the full and informed consent of the participant, who reviewed and approved the use of direct quotations.

### *3.7 Comparable Cases in the Literature*

The emerging scholarship on family business, natural wine, and rural entrepreneurship provides a useful comparative horizon for situating the *Fra i Monti* case. Three convergent findings from this literature are particularly relevant.

The first concerns the relationship between long-term family orientation and ecological commitment. Delmas and Gergaud (2014), studying 281 US wineries, demonstrate that family firms with strong transgenerational succession intentions are significantly more likely to adopt sustainable and organic practices – not because of regulatory pressure or market premium, but because the family's time horizon extends beyond the current generation's economic interests. The *Fra i Monti* case allows us to observe this motivational logic qualitatively and in its generative moment: the choice of organic viticulture, the recovery of indigenous varieties, and the construction of Ciociaria Naturale all reflect a temporality oriented toward what the territory might become in twenty or thirty years. The present case extends this argument to a context where the 'transgenerational' orientation operates without biological succession, directed instead toward a territorial community as the relevant future generation.

The third strand concerns the social capital function of small rural family wineries. Alonso and Bressan (2013), studying producers in the Brazilian Serra Gaúcha cluster, document how small family-owned wineries act not only as economic enterprises but as providers, guardians, and promoters of community welfare – investing in social capital well beyond their commercial interests. The founding of Ciociaria Naturale maps closely onto this community stewardship function. The theoretical contribution of the present case is to show that this function is constitutive of the business model itself: the community investment is inseparable from value creation, because the authenticity of the product depends on the vitality of the territory.

Taken together, these two cases confirm that *Fra i Monti* belongs to a theoretically recognisable type – the territorially embedded, stewardship-oriented, family-type natural winery – while simultaneously exhibiting characteristics that push the boundaries of existing frameworks: the absence of prior family firm structure, the centrality of historical rupture, and the role of territorial memory as the primary entrepreneurial resource.



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## 4. Results and Discussion

### *4.1 Overview*

The empirical analysis is organised around four thematic clusters derived from the Gioia data structure: the origin of the entrepreneurial project (territorial memory as trigger); the strategic vision (stewardship orientation); the resource base (familiness of place); and the market trajectory (conversion of peripherality into premium positioning). Each cluster is read through the relevant theoretical constructs identified in Section 2, with attention to both confirmatory evidence and moments of analytical extension. The section concludes with an integrated discussion of *Fra i Monti* as a prototype of a territorially embedded family-type business model.

### *4.2 Theme 1 – The Origin: Territorial Memory as Entrepreneurial Trigger*

The founding of *Fra i Monti* does not follow the canonical logic of entrepreneurial opportunity recognition. It follows, instead, the logic of territorial memory: an affective, identity-laden impulse rooted in the specific history of a place. The starting point is 2008, ten years before the first harvest. Rocco Toti and Benedetto Leone open a tasting space in the Terelle town hall, combining wine, food, painting exhibitions, and readings – an act of cultural investment with no immediate commercial logic.

*"We were just bottle-openers, not even expert ones. Little by little, we became passionate about natural wine, driven by the desire to produce, to try to leave a mark on our territory".*

*"The seed of the historical potato variety of Terelle has been lost. Incredibly. Terelle once had over 100 hectares of chestnut grove converted into flour. All of this has disappeared".*

The entrepreneurial trigger proper arrives through La Cerquella – a farmhouse built by Benedetto and Francesco's father, who died shortly afterwards. The place carries a weight of personal memory and territorial attachment that cannot be reduced to an asset valuation.

*"We intensely wanted to bring that place back to life. We rented some vineyards and made our first harvest in 2018, in a garage. It all started as a game".*



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Read through the SEW framework, this founding moment is analytically transparent: the Cerquella materialises the identification and emotional attachment dimensions of socioemotional wealth – the affective reference point around which an entrepreneurial identity crystallises. What makes the case theoretically distinctive is that this SEW is not inherited from an existing firm but constructed through the entrepreneurial act itself, with territorial memory as the primary anchor. The second trigger is the encounter with the international natural wine circuit at Malmö, Sweden, which transforms a cultural project into a viable enterprise. This sequence – cultural roots first, commercial development second – is characteristic of stewardship-oriented entrepreneurship, in which legitimacy precedes and enables market positioning.

### *4.3 Theme 2 – The Vision: Stewardship of Territory as Strategic Horizon*

The strategic orientation of *Fra i Monti* is structured by what Miller and Le Breton-Miller (2005) identify as the three dimensions of stewardship: community, continuity, and connection. Community is expressed through the founding of Ciociaria Naturale. Rocco Toti articulates the logic explicitly:

*"In inland areas, jealousy or individualism are useless. Madame Lalou Bize-Leroy used to say: 'My wines do not taste of Pinot Noir but of Burgundy.' This teaches us all a great lesson. Yes, we must promote the territory; but a union of forces is necessary to break the isolation and marginality".*

*"Terroir cannot be only soil and climate – it must be extended to what is made with one's hands, to the entire tradition of a community. It serves to preserve the place, the identity of the territory. This is the journey that natural wine must make".*

*"In 2017 we chose to make wine in amphorae when stainless steel was dominant. We had clear ideas. We were looking ahead".*

This is stewardship of the territorial brand: by investing in collective promotion, the founders accept the risk that competitors benefit from the reputational infrastructure they help construct – irrational in competitive strategy terms, entirely coherent within a stewardship logic. Continuity is revealed in the long-term horizon: the recovery of nearly extinct indigenous varieties is an investment with no short-term payoff. The choice of high-altitude viticulture is explicitly a response to climate change – at nearly one thousand metres, temperature extremes are attenuated and conditions remain favourable for the complex, slow-ripening varieties the natural wine market prizes.



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Connection appears in the explicit articulation of the winery's territorial role: "Through wine production, we try to bring people back to Terelle".

### *4.4 Theme 3 – The Resources: Familiness Without Biological Family*

The third thematic cluster examines the resource base of *Fra i Monti*, providing empirical grounding for Proposition 2. Read through the familiness framework, three idiosyncratic resource clusters constitute the distinctiveness of the enterprise in its extended, territory-anchored form. Heritage knowledge: the recovery of Semillon and Maturano – "grape varieties of an Italian peasant world that no longer exists" – is an act of heritage knowledge mobilisation. These varieties survived in degraded, fragmented form because no commercial producer had found them viable. Rocco and Benedetto, working with agronomists and botanists, contributed to reconstructing their genetic heritage, enabling re-entry into commercial viticulture. Relational legitimacy: the decade of cultural initiatives in Terelle before the first commercial harvest establishes a form of social capital – rooted in the community and legible to outsiders as authenticity – that cannot be purchased and is, in Habbershon and Williams's (1999) terms, non-replicable. Territorial embeddedness: high-altitude viticulture at nearly one thousand metres requires tacit, place-specific knowledge – denser vine planting, Guyot pruning, soil management to prevent erosion – that is accumulated through direct experience and constitutes simultaneously a barrier to entry and a source of product distinctiveness. The following quotations illustrate the second and third resource clusters; the second refers to the figure of the 'metal-mezzadro' ('metalworker-sharecropper': the part-time factory worker who held industrial employment during the week while still cultivating a family plot, emblematic of Italy's incomplete rural-industrial transition of the 1960s–1970s).

*"A historical variety, 150 to 200 years old – it was a local vinegrape. Until the 1990s it was crafted alongside other plants. Semillon blanc was planted by Count Visocchi in Atina and Cassino, an agronomist and minister of the Kingdom of the Two Sicilies. From there he brought Merlot, Cabernet and Semillon – the first traces of Bordeaux varieties in Italy".*

*"The metal-mezzadro not holding a VAT number roams the woods, but is stripped of the product to sell it and unable to imagine technological and social development. His agricultural know-how is of no use to anyone".*



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## *4.5 Theme 4 – The Market: From Peripheral Authenticity to International Premium*

The fourth thematic cluster addresses the market trajectory of *Fra i Monti*, providing empirical grounding for Proposition 3. The commercial trajectory illustrates the conversion of peripheral marginality into a premium market position through the stewardship-driven business model. The natural wine market assigns specific value to provenance from obscure, non-canonical territories: a winery in Terelle, producing indigenous varieties that most oenologists have never heard of, carries a distinct authenticity signal that is highly legible within the international natural wine community. The Malmö fair episode is the hinge point of this conversion. By 2026, *Fra i Monti* – together with the related but autonomous initiative Fattore Umano, established in 2021 through a partnership between Rocco, Benedetto, and the oenologist and agronomist Gennaro Reale – produces approximately 30,000 bottles per year: a significant volume for a high-altitude, fully organic, artisanal producer operating in what was, eight years ago, a viticultural vacuum.

*"There are closed wine areas, wonderful terroirs and stories, and producers who do not evolve. Irpinia, for example, still today cannot find its own dimension. Roccamonfina in the province of Caserta has a biodiversity comparable to Etna, yet no noteworthy winery comes to mind".*

## *4.6* Fra i Monti *as a Prototype of a Territorially Embedded Family-Type Business Model*

*Fra i Monti* constitutes a prototype of a territorially embedded family-type business model whose three constitutive dimensions – value creation, value capture, and value delivery (Teece, 2010) – are inseparable from the identity and stewardship logic of the enterprise.

### 4.6.1 Value Creation: What *Fra i Monti* Produces and Why

The value proposition of *Fra i Monti* is simultaneously a product proposition and a territorial proposition. *Fra i Monti* started in 2018 with a total production of 3,000 bottles across three labels, growing steadily to a peak of 15,000 bottles in 2021 and 2022. Production then declined to 12,000 bottles in 2023 across seven labels, a contraction linked to adverse climatic conditions in that vintage year – an episode that is itself analytically significant: it



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illustrates the ecological vulnerability that is the structural counterpart of the stewardship model's commitment to fully organic viticulture, which foregoes the chemical interventions that would partially hedge such exposure. The production trajectory is detailed in Table 1 below, which covers *Fra i Monti*'s own production. Combined with Fattore Umano, established in 2021, total production across both labels reached approximately 30,000 bottles by 2026, following expanded vineyard surface and the addition of new labels in 2024 and 2025. Pricing is positioned at a medium level for the natural wine standard, with the deliberate purpose of setting an accessible entry point in international markets without sacrificing the quality and authenticity signals on which the value proposition depends.

*Table 2:* Fra i Monti*: yearly labels and production volumes (2018–2023)*

| Year | No. Labels | Labels | Bottles/Label | Total Bottles |
|---|---|---|---|---|
| 2018 | 3 | Sempre in due / Bianco di Civita / Alavolee | 1,000 each | 3,000 |
| 2019 | 4 | + Più una al giorno | 1,500 each | 6,000 |
| 2020 | 5 | + Rivoluzione Cabernicana | 2,000–2,500 each | 12,000 |
| 2021 | 6 | + Tinto di rosso | 2,500 each | 15,000 |
| 2022 | 6 | Same as 2021 | 2,500 each | 15,000 |
| 2023 | 7 | + Sous Voile | 1,000–2,000 each | 12,000 |

*Source:* Fra i Monti *Srl*

This value creation logic is supply-constrained by design: the choice of high-altitude production and fully manual, organic viticulture places absolute limits on scalable expansion. It is also temporally deep, drawing value from a viticultural history that precedes the founding of the firm by centuries. The labels themselves – Sempre in due, Bianco di Civita, Alavolee, Rivoluzione Cabernicana, Sous Voile – carry an aesthetic and narrative identity inseparable from the territorial and biographical story of the enterprise.



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### 4.6.2 Value Capture: How the Model is Financially Sustained

*Fra i Monti* is a limited liability company founded on equal terms by three partners – Rocco, Benedetto, and Francesco – financed through a combination of personal investment and a grant from the Rural Development Plan (PSR) of the Lazio Region, which provided support for the purchase of equipment and the construction of the winery. This financing structure is itself theoretically significant: it illustrates how the territorially embedded family-type business model can be co-enabled by public rural development policy without losing its identity logic – the PSR grant fills a capital gap but does not alter the motivational, relational, or stewardship orientation of the enterprise.

The value capture logic rests on premium positioning rather than volume. *Fra i Monti* operates through two commercial channels: the wholesale and HoReCa channel (€10–12 per unit) and the direct-to-consumer channel at the winery, fairs, and online (€17–19). Export markets include Japan, the United States, South Korea, and Switzerland. In the past twelve months, US exports have declined in response to anticipated tariffs, compensated by growth in domestic wine tourism to Terelle – a dynamic consistent with the stewardship model's territorial rootedness. *Fra i Monti*'s growing reputation rests on word-of-mouth within the natural wine community and direct promotional activity through networks such as Renaissance des Appellations and Demeter, rather than on mainstream guide reviews. In 2026, the enterprise was awarded the Eco-Tourism Oscar by Legambiente – a recognition that reinforces both its domestic positioning and its narrative of territorial stewardship.

### 4.6.3 Value Delivery: The Organisational Architecture

The organisational architecture of *Fra i Monti* can be characterised as a dyadic partnership with territorial extension. The operative core of the enterprise is the working relationship between Rocco and Benedetto. Rocco manages the winery and the commercial and distribution network; Benedetto supports winery operations and takes primary responsibility for field work and vineyard management. Francesco holds a representative role in the company structure but is principally engaged elsewhere. *Fra i Monti* employs one permanent employee, supplemented by subcontracted seasonal workers during harvest and other labour-intensive periods.

This structure functions as a family governance form without biological kinship (Chua *et al.*, 1999): decision-making is concentrated, values are



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aligned, and the orientation is long-term. The lean architecture – minimal fixed labour costs, maximum flexibility, direct founder involvement at every stage – is structurally consistent with the artisanal value proposition. The territorial extension of this core operates through Ciociaria Naturale, broadening the organisational perimeter to create shared infrastructure for territorial promotion, knowledge exchange, and collective legitimacy. Fattore Umano – established in 2021 with Gennaro Reale – represents a further territorial extension without integrating into the *Fra i Monti* legal and financial structure.

### *4.7 Three Theoretical Propositions*

On the basis of the foregoing analysis, we advance three theoretical propositions. These are presented as analytically grounded hypotheses derived from the case – consistent with the logic of theory building from cases (Eisenhardt and Graebner, 2007) – rather than as empirically confirmed generalisations. Each proposition identifies a mechanism that the *Fra i Monti* case illuminates and that future research, including multi-case comparison, should further examine and test.

Proposition 1: Territorial memory may function as the primary carrier of socioemotional wealth in the absence of an existing family firm, activating the motivational, identity, and relational dynamics associated with family-type entrepreneurship through shared attachment to a place rather than shared biological kinship. The boundary condition is that a sufficient stock of territorial memory – in the form of surviving ecological, cultural, and relational traces – must exist for this mechanism to operate.

Proposition 2: In contexts of deep historical discontinuity, the recovery of suppressed productive knowledge may constitute a form of familiness that is territorially rather than genealogically constituted, generating idiosyncratic competitive resources precisely because of the rupture it addresses. The boundary condition is that the relevant market must assign a premium to authenticity and place-based identity; in commodity markets, heritage knowledge would generate no competitive advantage.

Proposition 3: The stewardship orientation of territorially embedded family-type entrepreneurship may produce a business model structurally incompatible with volume growth but structurally compatible with the premium positioning logic of artisanal, place-based markets. The boundary condition is market access: the conversion of peripherality into a differentiator requires the existence of international networks capable of mediating between marginal producers and distant premium consumers.



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## 5. Conclusions

### *5.1 Summary of Findings and Theoretical Contributions*

This paper examined how entrepreneurial actors mobilise territorial memory, socioemotional wealth, and stewardship orientations to generate entrepreneurial innovation in historically marginalised rural areas. The case of *Fra i Monti*, an organic winery founded in 2018 in Terelle, in the province of Frosinone, offers a clear illustration of this dynamic. *Fra i Monti* does not fit the conventional profile of a family firm: there is no inherited business, no biological succession, no prior entrepreneurial tradition to build on. What its founders share is something different – a deep attachment to a place, a commitment to recovering what industrial monoculture had nearly destroyed, and a long-term orientation that consistently overrides short-term economic logic. We have called this territorial memory: the stock of place-specific knowledge, practices, and identity narratives that survives historical rupture in degraded form and can be remobilised as the founding resource of a new entrepreneurial act.

The paper makes three theoretical contributions to what the literature might call entrepreneurship from discontinuity – the reconstruction of economic activity in contexts of deep historical rupture. First, it shows that socioemotional wealth – typically associated with established family firms – can emerge in the absence of a pre-existing firm, activated by shared attachment to a place rather than shared biological kinship. Second, it proposes that familiness, understood as an idiosyncratic bundle of non-replicable resources, can be territorially rather than genealogically constituted: what makes *Fra i Monti* distinctive is not a family heritage but a territorial one. Third, following Colli (2003), it argues that a business history perspective is not merely useful context but a theoretical necessity in cases like this one – because the rupture of the 1960s–1970s industrialisation in internal rural areas is not the backdrop of the story; it is what makes the story possible.

These findings carry implications for rural development policy. The co-financing of the enterprise through the PSR of the Lazio Region illustrates that public instruments can play a catalytic role in enabling territorially embedded entrepreneurship – but only when they accompany motivational, relational, and stewardship orientations that are already present. Policy instruments that reward heritage knowledge recovery, territorial producer networks, and place-based tourism are likely to generate more durable results than those focused exclusively on productive capacity.



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### *5.2 Limitations, Boundary Conditions, and Future Research*

The paper carries several acknowledged limitations that also constitute the most productive directions for future research. At the empirical level, the principal limitation is the reliance on a single interview with one of the three co-founders; triangulation through interviews with Benedetto and Francesco Leone and longitudinal follow-up are identified as priorities. At the theoretical level, the boundary conditions stated in Section 4.7 – the need for surviving territorial traces, authenticity-premium markets, and mediating international networks – define the limits of transferability and should guide future multi-case research. Most acutely, the transgenerational dimension of SEW remains empirically unresolved: *Fra i Monti* is eight years old and at the founder stage. Whether the founders will transmit the enterprise to biological descendants, trusted collaborators, or through a community-oriented mechanism remains open – and will determine whether the territorial memory that animates the enterprise survives beyond the founding generation. This is, in our view, the most theoretically significant direction for longitudinal follow-up.

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# Digital Marketing Strategies and Consumer Behavior: A PRISMA-based Systematic Review

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**Abstract**

Digital marketing has transformed the nature of the business-consumer relationship and is utilizing technological innovation and changing consumer expectations. Following the PRISMA guidelines to understand the effects of essential digital marketing strategies: social media marketing, content marketing, online advertising, e-commerce experience and personalized marketing. A synthesis of empirical data is reviewed to develop a conceptual framework explaining how these strat-

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egies influence consumer trust, purchase intention and brand loyalty. Existing gaps are identified, including the lack of cross-cultural and longitudinal research, ethical issues of using AI-based personalization and unexplored opportunities of immersive technologies. Significant contribution towards academic knowledge is made by the combined theoretical input and evidence-based suggestions to develop effective, ethically sound, practice-based, and globally appealing digital marketing campaigns in the fast-paced digital environment.

*Keywords:* digital marketing, consumer behavior, social media marketing, content marketing, e-commerce experience, personalized marketing

*Strategie di marketing digitale e comportamento del consumatore: una revisione sistematica della letteratura basata sul protocollo PRISMA*

**Sommario**

Il marketing digitale ha trasformato la natura della relazione tra impresa e consumatore, facendo leva sull'innovazione tecnologica e sull'evoluzione delle aspettative dei consumatori. Seguendo le linee guida PRISMA, il presente studio analizza gli effetti delle principali strategie di marketing digitale, tra cui il social media marketing, il content marketing, la pubblicità online, l'esperienza di e-commerce e il marketing personalizzato. Attraverso una sintesi delle evidenze empiriche disponibili, viene sviluppato un framework concettuale che spiega in che modo tali strategie influenzino la fiducia dei consumatori, l'intenzione di acquisto e la fedeltà alla marca. Lo studio individua inoltre alcune lacune nella letteratura, tra cui la limitata disponibilità di ricerche cross-culturali e longitudinali, le questioni etiche connesse all'impiego della personalizzazione basata sull'intelligenza artificiale e le opportunità ancora poco esplorate offerte dalle tecnologie immersive. Il contributo del lavoro alla letteratura consiste nell'integrazione di prospettive teoriche ed evidenze empiriche, da cui derivano indicazioni utili per progettare campagne di marketing digitale efficaci, eticamente responsabili, orientate alla pratica e capaci di rispondere alle esigenze di un mercato globale in un contesto digitale in continua evoluzione.

*Parole chiave:* marketing digitale, comportamento del consumatore, social media marketing, content marketing, e-commerce experience, marketing personalizzato

## 1. Introduction

The digital revolution keeps transforming the business-consumer interaction to create a more dynamic and sophisticated digital marketing environment. The rise of internet-sensitive gadgets, mobile technologies, social



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media platforms, and new technologies such as artificial intelligence (AI) and immersive technologies (e.g., metaverse, virtual reality) has established digital marketing as one of the foundations of business strategy in all industries (Chaffey and Ellis-Chadwick, 2019; Tiago and Verissimo, 2014). Digital marketing, as opposed to conventional methods, allows real-time engagement and reaches its target market accurately, tracks the performance generated by data, and applies dynamic responses to the ever-changing consumer trends and technological changes. Consumer expectations and behavior are radically changing as digital technologies are being adopted. The new customer is becoming more knowledgeable, empowered, and picky with the availability of online reviews, content customization, interactive brand communications, and AI-boosted experiences (Kannan, 2017; Ngo *et al.*, 2025).

Although the digital marketing research continues to grow rapidly, the literature is still disjointed. Numerous studies concentrate on single applications like social media marketing, content marketing, or online advertising, restraining a comprehensive perception of their delicate effects on consumer conduct (Appel *et al.*, 2020; Lamberton and Stephen, 2016). It is an obstacle to theoretical progress and the practical use of the insights in the realm of brand engagement, trust, loyalty, and purchasing behavior, especially when new trends, such as AI personalization and immersive e-commerce gain prominence. Further developments as personalization based on artificial intelligence, immersive technologies (e.g., augmented and virtual reality), and blockchain-based marketing, are underutilized when it comes to consumer decision-making (Kabir and Kang, 2024; Dwivedi *et al.*, 2023). Although these technologies have become increasingly popular in practice, their immediate implication in terms of consumer behavior and aspects of ethical nature as transparency in artificial intelligence personalization or data privacy, lacks representation in scholarly literature.

The geographic bias is also carried through to the literature, where the majority of the studies concentrate on the Western market (Appel *et al.*, 2020). Despite all the recent studies that have started to investigate emerging economies (Kabir and Kang, 2024), little is known about digital consumers' behaviour in culturally diverse economies, so whatever is discovered loses international comparability.

To gain theoretical progress, this systematic literature review, written in accordance with PRISMA guidelines, summarizes empirical evidence from peer-reviewed articles published between 2015 and September 2025. The purpose of this study is to explain the impact of digital marketing strategies social media marketing, content marketing, online advertising, e-commerce experience, and personalized marketing, on consumer behavior, as well as



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identify some of the key moderating factors, including demographics, platform type, cultural context, privacy concerns, and AI ethics that determine these outcomes. This review provides implications for scholars and practitioners operating in digital markets. Therefore, this papers set out the following objectives: 1) To review and classify five pillars of digital marketing approaches systematically: social media marketing, content marketing, online advertising, e-commerce experience, and personalized marketing, as well as the new schemes like AI-driven personalization and immersive technologies; 2) To assess how such strategies effect some of the major consumer behavior outcomes, such as trust, purchase intention, and brand loyalty, taking into consideration the moderating effects, such as the privacy concerns and the cultural context; and 3) To determine the trends and important gaps in the existing literature, including the use of AI in the context of ethical matters and the cross-cultural approach, to inform effective research in digital marketing and consumer behavior in the future. By achieving these objectives this study contributes in three respects: (1) provide a syntactic representation of the recent empirical studies of different digital marketing channels; (2) propose a conceptual framework grounded in a theory that identifies the mechanisms and moderating factors of the digital marketing effectiveness; and (3) identify research gaps that encompass (a) the ethical usage of data in digital marketing and (b) cultural variation and the long-term effects of digital engagements. Collectively, these contributions support and strengthen academic knowledge and practice more efficiently in terms of the developing sphere of digital marketing.

## 2. Literature Review

In this section, the thematic synthesis of empirical studies is conducted concerning digital marketing strategies and their effect on consumer behavior between 2015 and September 2025. The literature presented has been classified in relation to five major themes and explained using applicable theoretical frameworks.

### *2.1 Social Media Marketing and Consumer Behavior*

Social media platforms such as Facebook, Instagram, and TikTok play a central role in digital marketing through real-time consumer interaction. The empirical research constantly proves that social media marketing contributes to the growth of the brand trust, awareness, and purchase intention



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(Alalwan, 2018; Appel *et al.*, 2020). As an example, Alalwan (2018) studied the survey of 437 Saudi Arabian participants and revealed that informativeness and credibility are significant drivers of purchase intention. Likewise, in a quantitative survey, having 276 participants, Appel *et al.* (2020) emphasized the risk of being tired of social media due to overload.

According to Social Proof Theory, peer-generated content, likes, comments, and reviews increase perceived credibility and influence consumer behavior. In their experiment with 230 users, Lou and Yuan (2019) demonstrated the value and credibility of messages delivered by influencers that increase trust. Content curation based on AI is also discussed in recent studies. As an example, Karami *et al.* (2024) discuss AI-based personalization in online marketing by demonstrating that it can be beneficial in terms of increasing engagement, but it creates ethical issues of privacy, bias, and transparency. In a survey of 533 Facebook users, Kim and Johnson (2016) discovered that user generated content has a significant effect on advertising and adds to the level of trust and intention to buy.

Platform responsiveness varies across demographics, with younger users preferring visual content on Instagram and older users responding more positively to informative Facebook posts (Appel *et al.*, 2020). Using a survey of 384 Facebook users, Dehghani and Tumer (2015) established that Facebook ads have a substantial influence on purchase intention.

Identified Gap 1: Longitudinal research and cross-site comparisons assessing brand engagement in the long-term are lacking the issue of algorithmic filters to apply AI and cross-cultural user preferences across various social media ecosystems.

## *2.2 Online Advertising and Purchase Intention*

Digital advertising formats such as banners, search ads, and video ads are used to increase engagement and conversions. According to the Elaboration Likelihood Model, personalized ads are more persuasive because they stimulate deeper cognitive processing (Lamberton and Stephen, 2016). The presence of such issues as banner blindness, ad fatigue, and perceived intrusiveness, however, makes ads less efficient.

Increased targeting can greatly improve the effectiveness of advertisements, but proper targeting can result in anti-consumer actions of targeted ads because of privacy issues (Bleier and Eisenbeiss, 2015; Boerman *et al.*, 2017). A survey of 213 users conducted by Bleier and Eisenbeiss (2015) showed that perception of trustworthiness is the intermediate between the effectiveness of personalized ads. In a study of 288 respondents by Boer-



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man *et al.* (2017), the researchers revealed that privacy issues negatively impact ad perceptions and clicking habits. Recent studies (e.g., Dwivedi *et al.*, 2023) highlight ethical concerns related to AI-generated advertising, particularly regarding transparency and data use.

Identified Gap 2: Gap in the psychology and contextual demarcations of AI-powered personalization in advertising, specifically the interplay between relevance and privacy and ethical disclosure, is understudied, especially in non-Western environments.

## *2.3 Content Marketing and Brand Perception*

Content marketing uses blogs, videos, infographics, and storytelling to inform and emotionally engage consumers. Good quality content helps to gain the trust of consumers and increase the loyalty towards the brand in the long run, which is in line with Trust Transfer Theory (Pulizzi, 2012; Ashley and Tuten, 2015). In their content analysis of the 200 branded social media campaigns, Ashley and Taten (2015) discovered that creative approaches in the content help enhance consumer interactions. Equally, a recent study in India by Habib *et al.* (2022), conducted based on a survey of 417 consumers, reveals that digital media communication improves consumer engagement, which, in its turn, positively determines the desire to purchase a brand based on consumer engagement and brand image.

Multimedia formats such as videos and visual posts are generally more engaging than text-only content (Kim and Ko, 2012). Nevertheless, content that is very specific or unbased can result in content fatigue due to a lack of interest and brand attachment (Appel *et al.*, 2020). Modern studies by Chatterjee (2024) are concerned with the issues of naming the AI-generated material, which highlights the idea that although automation allows increasing efficiency, it also casts doubt on authenticity and transparency. Content labeling may help preserve credibility and consumer trust.

Identified Gap 3: There is no existing literature exploring the best content frequency, the depth of personalization, and strategies that support a customer base of various types of consumers, especially with the emergence of AI-generated content and its ethical consequences.

## *2.4 e-Commerce Experience and Purchase Behavior*

E-commerce platforms influence consumer decision-making through usability, mobile accessibility, and secure payments. According to the



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Technology Acceptance Model, perceived ease of use and usefulness are motivators of using digital technology (Davis, 1989). In their survey of 257 users, Sharma and Lijuan (2015) showed that satisfaction and repeat purchase behavior depend directly on the quality of the websites. The research proposed by Kukar-Kinney *et al.* (2022) was based on clickstream data to determine the reasons the shopping cart had been abandoned. Recent studies (e.g., Zeng *et al.*, 2023; Soderstrom *et al.*, 2024) show that AR/VR technologies in e-commerce environments increase engagement and purchase intention. Despite privacy concerns, convenience and perceived value often prevail (Lamberton and Stephen, 2016). A survey of 350 consumers by Erlangga *et al.* (2021) has also pointed to the influence of social media advertisements on the purchasing process of SMEs in e-commerce.

Identified Gap 4: The gaps that have been identified are cultural and demographic variation in reaction toward privacy risks, convenience trade-offs, and immersive technologies (e.g., AR/VR) across the differing e-commerce setups, especially in the non-Western markets.

## *2.5 Personalization and Brand Loyalty*

Personalized marketing increases customer satisfaction and brand loyalty through tailored recommendations and customized digital experiences (Kannan, 2017). According to the Relationship Marketing Theory, personalized relationships form emotional attachments as well as trust. Arora and Sanni (2019) found that AI-based personalization increases trust, satisfaction, and purchase intention. The survey conducted by Wang *et al.* (2022) on 543 mobile-shopping customers revealed that contextual mobile advertisement has a positive impact on purchase intention, which was mediated by personality characteristics. However, unethical or non-transparent data use may undermine consumer trust (Boerman *et al.*, 2017; Dwivedi *et al.*, 2023). Dwivedi *et al.* (2023) add that personalization (generation of AI) can increase susceptibility to privacy issues and, as such, requires an ethical foundation.

Identified Gap 5: Longitudinal studies that determine the effect of personalization, based on AI, changing customer expectations, and social responsibility in data usage on brand trust and customer loyalty over an extended period, particularly in multicultural settings, are required.



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## *2.6 Conceptual Framework*

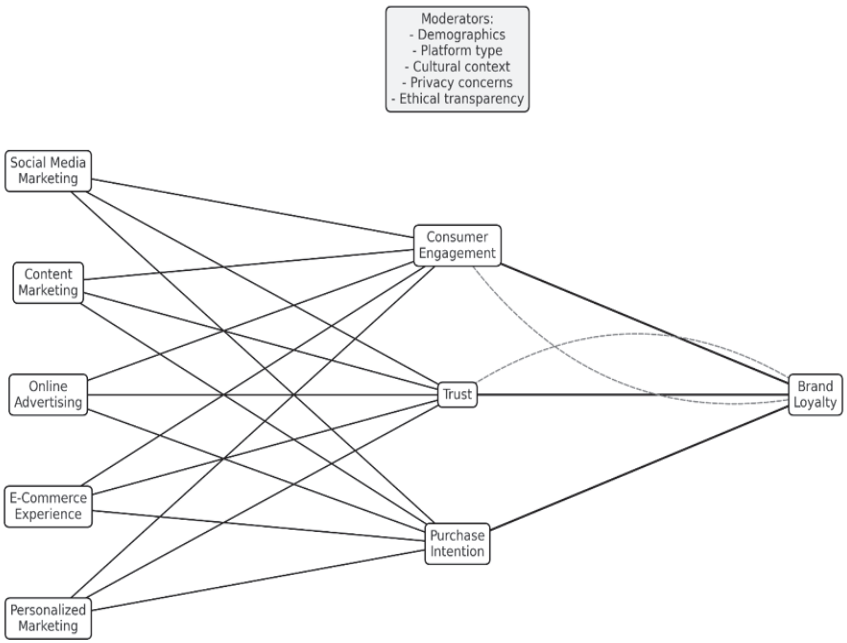
The study will utilize this conceptual framework presented below in Figure 1 based on the above synthesis of literature published between 2015 and September 2025 which will provide insight into how the main digital marketing strategies impact consumer behavior. The framework has theoretical models based on which they are based on Social Proof Theory, the Elaboration Likelihood Model, the Technology Acceptance Model, and Relationship Marketing Theory. The framework has five fundamental digital marketing strategies namely, social media marketing; online advertising; content marketing; e-commerce experience; and personalized marketing. These strategies, enhanced by emerging technologies such as artificial intelligence (AI) and Augmented/Virtual reality (AR/VR), are hypothesized to influence three immediate consumer behavior outcomes such as consumer engagement, trust and purchase intention. Thus, these immediate outcomes contribute to the development of brand loyalty.

A reinforcing loop is suggested, where loyalty to the brand improves future trust and interaction, that is, a dynamic interplay between the digital marketing endeavor and consumer reaction. The framework suggests that the strength and directional impact of these relationships are determined by the following moderating variables, which are perceived to have a relationship namely, demographic characteristics, platform type, cultural context, privacy concerns and ethical transparency. This model provides a structured basis for understanding the complex interactions between digital marketing activities, including AI-driven personalization and AR/VR-enhanced experiences, and consumer behavior across diverse markets. It highlights the importance of individual and situational factors in influencing consumer reactions, like cultural differences in the emerging economies and ethical issues regarding the use of data. The framework, shown in Figure 1 below, helps in developing hypotheses and testing when it comes to seeking and testing in the global markets, digital markets, and cultural settings, as it balances the strands of the theory to diversify the studies and in the science field.



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*Fig. 1: Conceptual Framework: Influence of Digital Marketing Strategies on Consumer Behavior (own research)*




## 3. Materials and Methods

The systematic literature review involves the use of the PRISMA (Preferred Reporting Items of a Systematic Review and a Meta Analysis) protocol. The idea is to conduct a synthesis and analysis of empirical research on digital marketing strategies and their effects on consumer behavior between 2015 to September 2025. This methodology comprises six steps, namely review protocol design, search strategy, inclusion and exclusion criteria, screening and selection, quality assessment, and data extraction and synthesis.

### *3.1 Systematic Review Protocol*

The protocol of reviewing was created to make it as transparent, reliable, and replicable. The researchers concentrated on peer-reviewed articles that were published between January 2015 and September 2025 that inves-



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tigated digital marketing tactics, such as social media marketing, online marketing, content marketing, e-commerce experience, and tailored marketing, and their influence on the consumer behavioral outcomes in terms of engagement, trust, purchase intention, and brand loyalty.

An extensive search plan was adopted to find out the relevant peer reviewed studies on the effect of digital marketing approaches on consumer behavior. The databases used in the searches included the following: Scopus, Web of Science, Google Scholar, Science Direct, and EBSCOhost.

The upper limit of the search covered articles published after January 1, 2015, and until September 30, 2025, to reflect modern trends, such as the use of AI to provide personalization, the application of AR/VR, and ethics. The relevant literature was maximized using the Boolean operators and a restrictive combination of keywords.

The search terms were mostly as follows:

1. "Digital marketing" AND "consumer behavior"
2. "Social media marketing" AND ("trust" OR "engagement" OR "purchase intention")
3. "Content marketing" AND ("consumer response" OR "brand loyalty")
4. "Online advertising" AND ("brand loyalty" OR "trust" OR "AI" OR "augmented reality")
5. "Personalized marketing" AND ("consumer behavior" OR "privacy" OR "ethical transparency")
6. "e-commerce experience" AND ("user experience (UX)" OR "purchase intention" OR "loyalty" OR "AR/VR")
7. "Blockchain" AND ("marketing" OR "consumer trust")

The inclusion of English language articles in peer-reviewed journals published in marketing, business, psychology, and communication fields was filtered. Similar records were filtered with a citation management tool that was applied to simplify the screening and selection process.

### *3.2 Inclusion and Exclusion Criteria*

Inclusion criteria comprised of merely the initial published empirical studies in peer reviewed journals of years 2015 to September 2025; research focusing on at least one digital marketing strategy (social media, online advertising, content marketing, e-commerce experience, personalized marketing); studies reporting consumer behavior outcomes (e.g., engagement, trust, loyalty, purchase intention) and articles employing quantitative, qualitative, or mixed-methods approaches

Exclusion Criteria were conceptual articles, opinion pieces, book chap-



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ters, and conference papers; articles focusing exclusively on traditional marketing strategies; studies not explicitly linking digital marketing to consumer behavior; and non-English publications.

### *3.3 Screening and Selection Process*

The first search got 892 articles. By eliminating the duplicates, 412 records were selected based on the titles and the abstract. Among them, 92 full text articles were utilized in terms of eligibility. Finally, 48 articles passed all the selection criteria and were included in the review, which indicates that recent 2024-2025 studies on AI, AR/VR, and cross-cultural contexts could be included.

*Fig. 2: PRISMA Flow Diagram Visualization (own research)*

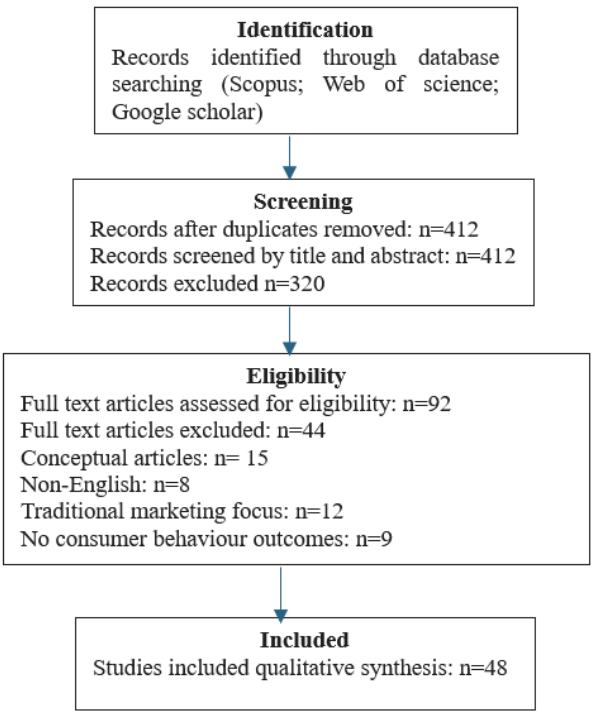



Figure 2 visualizes the number of studies at each stage of the PRISMA flow diagram process. A two-tiered process of screening was undertaken by two reviewers. The disagreements were due to the discussion and to the



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successful decision that allows the high reliability in the selection of the studies. The selection process can be summarized using a PRISMA flow diagram.

### *3.4 Quality Assessment*

Serious methodological flaws of the studies that were identified were to be evaluated using a modified version of the Critical Appraisal Skills Programme (CASP) checklist. Every study was assessed according to: 1) clarity of research aim, 2) appropriateness of methodology, 3) sampling adequacy, 4) data collection methods, 5) rigor of data analysis, 6) validity and reliability of findings, and 7) transparency of limitations.

The studies have been categorized as high quality studies, middle quality studies, and low-quality studies. The final synthesis was considered to consist of only studies that were rated moderate or high. The reviewers performed the quality appraisal by themselves, and the inter-rater agreement was more than 90 percent.

### *3.5 Data Extraction and Synthesis*

To enable the extraction of the required data of a specific study, a standardized data extraction form was made to provide consistency in gathering the relevant information. The data were as follows: author(s) and year of publishing, research methodology, sample size, strategy of digital marketing studied, consequences of consumer behavior, and moderating factors (e.g., cultural background, privacy issues, ethical transparency).

The results were organized and synthesized in a narrative approach and were grouped into five strategic categories within the conceptual framework, namely: social media marketing, content marketing, online advertising, e-commerce experience, and personalized marketing. The use of such a thematic synthesis led to the systematic interpretation of literature and the identification of trends, theoretical provisions, and gaps concerning AI, AR/VR, blockchain, and cross-cultural influences. In Table 1, the results are reported, giving an idea of the studies conducted, the methodology of the studies, and their important results on the role of digital marketing strategies and consumer behavior.



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*Table 1: Summary of Reviewed Studies on Digital Marketing Strategies and Consumer Behavior (own research, from reviewed empirical studies published between 2015 and September 2025)*

| No. | Author(s) & Year | Method | Sample | Strategy | Key Findings |
|---|---|---|---|---|---|
| *Social media marketing* | | | | | |
| 1 | Kim & Johnson (2016) | Survey | 533 Facebook users | Social Media Marketing | User-generated mixed content enhances confidence and buying desire. |
| 2 | Kizgin *et al.* (2018) | Quantitative | 514 Turkish-Dutch respondents | Social Media Marketing | Social media favors purchase behavior and acculturation. |
| 3 | Alalwan (2018) | Survey | 437 participants (Saudi Arabia) | Social Media Marketing | Informativeness and credibility influence purchase intention. |
| 4 | Schivinski *et al.* (2016) | Scale Dev. | 2252 respondents | Social Media Marketing | Developed a scale for social media brand engagement. |
| 5 | Ningrum & Roostika (2021) | Quantitative | 250 Indonesian users | Social Media Marketing | Activities improve engagement and brand knowledge. |
| 6 | Hussain & Chimhundu (2023) | Survey | 385 valid responses (retail consumers) | Social Media Marketing | Social media enhances consumer purchase intention. |
| 7 | Zhang *et al.* (2023) | Survey | 257 TikTok users | Social Media Marketing | Perceived value, emotional pleasure, and flow experience significantly affect purchase intention in TikTok marketing. |
| 8 | Bassey & Etuk (2025) | Survey | 380 | AI-driven social media marketing | AI-driven social media marketing strategies significantly enhance brand engagement in developing economies. |
| 9 | Liu & Zheng (2024) | Survey | 216 | Influencer credibility in social media marketing | The persuasive power of social media influencers significantly enhances brand engagement in China. |
| *Content Marketing* | | | | | |
| 10 | Ashley & Tuten (2015) | Content Analysis | 200 campaigns | Content Marketing | Creative content improves brand engagement. |
| 11 | Dwivedi et al. (2021) | Systematic Review | Multi-study (reviewed literature) | Content Marketing | Evolution of digital content strategies impacts engagement. |



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| No. | Author(s) & Year | Method | Sample | Strategy | Key Findings |
|---|---|---|---|---|---|
| *Content Marketing* | | | | | |
| 12 | Bubphapant & Brandão (2025) | Survey | 417 | Content Marketing | Data-driven content marketing improves engagement and purchase intention through personalization. |
| 13 | Appel *et al.* (2020) | Quantitative (Survey) | 276 participants | Content Marketing | Content fatigue and platform variation influence outcomes. |
| 14 | Sari & Hermawan (2019) | Survey | 230 consumers | Content Marketing | SEO-driven content boosts brand awareness and purchase intention. |
| 15 | Attri *et al.* (2024) | Survey | In-store consumers | Content Marketing | AR-enhanced content boosts engagement but raises privacy concerns. |
| 16 | Verma & Sharma (2025) | Survey | 450 digital consumers | Content Marketing | AI-generated content enhances engagement but risks authenticity loss; ethical transparency is critical. |
| *Online advertising* | | | | | |
| 17 | Dehghani & Tumer (2015) | Survey | 384 Facebook users | Online Advertising | Facebook ads significantly influence purchase intention. |
| 18 | Li *et al.* (2020) | Field experiments | E-commerce users (>40,500 in main experiment) | Online Advertising (Cart retargeting timing) | Early retargeting (within ~30–60 minutes) can *reduce* purchase likelihood relative to later or no retargeting. |
| 19 | Ciuchita *et al.* (2023) | Survey | 275 users | Online Advertising | Positive perception of programmatic ad targeting. |
| 20 | Du *et al.* (2019) | Longitudinal | 575 brands | Online Advertising | Digital ad exposure improves brand attitudes. |
| 21 | Bleier & Eisenbeiss (2015) | Survey | 213 users | Online Advertising | Trust mediates the effectiveness of personalized ads. |
| 22 | Boerman *et al.* (2017) | Survey | 288 participants | Online Advertising | Privacy concerns affect ad perceptions. |
| 23 | Söderström *et al.* (2024) | Experiment | 350 participants | Online Advertising | AR ads improve engagement; cues and habituation affect effectiveness. |
| 24 | Smink *et al.* (2024) | Survey | 1,978 | AR in mobile advertising | AR in mobile ads boosts engagement; privacy concerns moderate effectiveness. |



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| No. | Author(s) & Year | Method | Sample | Strategy | Key Findings |
|---|---|---|---|---|---|
| *e-Commerce experience* | | | | | |
| 25 | Sharma & Lijuan (2015) | Survey | 257 users | E-Commerce Experience | Website quality influences satisfaction and repeat purchase. |
| 26 | Gómez-Díaz, J. A. (2016). | Ex-post | Colombia | E-Commerce Experience | Reconstructs decision paths in e-commerce. |
| 27 | Kukar-Kinney *et al.* (2022) | Click-stream | E-commerce data | E-Commerce Experience | Identifies causes of cart abandonment. |
| 28 | Song *et al.* (2021) | SEM | 493 app users | E-Commerce Experience | TAM + AIDA models predict app-based decisions. |
| 29 | Wang & Yu (2017) | Survey | 312 shoppers | E-Commerce Experience | Social commerce and reviews influence purchase. |
| 30 | Erlangga *et al.* (2021) | Survey | 350 consumers | E-Commerce Experience | Social media ads affect SME purchase behavior. |
| 31 | Zeng *et al.* (2023) | Survey | 389 consumers | E-Commerce Experience | AR/VR enhances trust and purchase intention in emerging markets. |
| 32 | Guo & Zhang (2024) | Survey | Not specified | AR in online shopping | AR online shopping experiences increase customer purchase intention through improved perceived ease of use and usefulness. |
| *Personalized marketing* | | | | | |
| 33 | Jin *et al.* (2019) | Survey | 318 followers | Personalized Marketing | Influencer authenticity boosts engagement. |
| 34 | Lou & Yuan (2019) | Experiment | 230 users | Personalized Marketing | Message value and credibility enhance trust. |
| 35 | Gul et al. (2024) | Survey | 300 questionnaires distributed (242 valid responses; 81.66% response rate) | Personalized Marketing | Personalized email marketing significantly influences the consumer buying decision process and increases purchase intent. |
| 36 | Matthew & Koce (2016) | Survey | 300 consumers | Personalized Marketing | Mobile trust and privacy concerns affect behavior. |
| 37 | Wang et al. (2022) | Survey (SEM) | 543 mobile-shopping consumers | Personalized Marketing | Contextual mobile ads improve advertising attitudes and increase purchase intention, moderated by personality traits. |



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| No. | Author(s) & Year | Method | Sample | Strategy | Key Findings |
|---|---|---|---|---|---|
| *Personalized marketing* | | | | | |
| 38 | Olarte-Pascual *et al.* (2016) | Quantitative | 400 mobile users (200 per country) | Personalized Marketing | Emotional and cognitive responses affect mobile ads. |
| 39 | Liu *et al.* (2018) | Survey | 279 social media brand community users | Personalized Marketing | Trust and attitude positively influence consumer engagement in social commerce contexts. |
| 40 | Huang & Copeland (2020) | Survey | 210 Gen Z consumers | Personalized Marketing | Influencers and hashtags shape apparel purchases. |
| 41 | Xu & Chawla (2017) | Data Mining | Twitter (large dataset of tweets) | Personalized Marketing | Tweet features predict engagement. |
| 42 | Chen *et al.* (2020) | Longitudinal | Twitter (large dataset of hashtags) | Personalized Marketing | Hashtag dynamics reveal behavior patterns. |
| 43 | Giannoulakis & Tsapatsoulis (2016) | Computational Analysis | Instagram (photos/hashtags) | Personalized Marketing | Hashtags improve content descriptiveness and discoverability. |
| 44 | Arora & Sanni (2019) | Survey | 305 online consumers | Personalized Marketing | AI-based personalization enhances trust, satisfaction, and purchase intention. |
| 45 | Dwivedi *et al.* (2023) | Systematic Review | Multi-study | Personalized Marketing | Generative AI in personalization amplifies privacy concerns; ethical frameworks are needed. |
| 46 | Yang & Lin (2024) | Survey | 308 | Personalized Marketing | AR-driven personalization enhances consumer engagement and purchase intention; transparency is critical for trust. |
| 47 | Lina & Setiyanto (2021) | Survey | 131 | Personalized Advertising | Personalized advertising enhances advertising value and purchase intention; privacy concerns do not moderate this effect. |
| 48 | Hashem (2024) | Empirical | 372 | Personalized Marketing | Blockchain enhances personalized marketing by improving data control, trust, transparency, and e-CRM efficiency; technology adoption moderates this relationship. |



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## 4. Findings

The results of this systematic review of 48 empirical articles published since 2015 up to September 2025 showed five core strategies of digital marketing that were important in shaping consumer behavior. The strategies do not contradict the conceptual framework and show how companies can increase interaction, trust, purchase intentions, and brand loyalty by implementing successful digital interactions, which make use of new advanced technologies such as AI, AR/VR, and blockchain.

### *4.1 Social Media Marketing*

Social media marketing increases brand awareness, trust, and purchase intention, especially among younger consumers. They are motivated by interactive content, user-created content, and influencer credibility, and promote engagement and loyalty, and cultural context leads to different reactions in different markets (Alalwan, 2018; Zhang *et al.*, 2023).

### *4.2 Content Marketing*

High-quality and AR-enhanced content improves engagement, trust, and purchase intention, although AI-generated content may reduce perceived authenticity. The quality of the information decreases the chances of thinking and loyalty in the long term, as well as the quality and data-driven content, with the use of AI-generated content increasing because of the possibilities of content fatigue and loss of authenticity (Ashley and Tuten, 2015; Attri *et al.*, 2024; Verma and Sharma, 2025). It is important to ensure ethical transparency in the creation of content in order to build trust.

### *4.3 Online Advertising*

Online advertising improves brand recognition and engagement, although privacy concerns may reduce ad acceptance. AR ads are efficient (only in case they happen in time, are relevant, and on the platform), and the key is to have sufficient prompts to prevent habituation (Dehghani and Tumer, 2015; Soderstrom *et al.*, 2024; Smink *et al.*, 2024). There are serious matters of privacy and trust when it comes to ad acceptance, especially in regards to programmatic targeting (Boerman *et al.*, 2017; Bleier and Eisenbeiss, 2015).



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### *4.4 e-Commerce Experience*

Usable and AR/VR-enhanced e-commerce platforms improve satisfaction, trust, and purchase intention. All these enhance a feeling of trust and conversions, especially in the developing markets, such as Asia, whereas usability promotes repeat and retention (Sharma and Lijuan, 2015; Song *et al.*, 2021; Zeng *et al.*, 2023; Hsu *et al.*, 2024).

### *4.5 Personalized Marketing*

Personalized marketing with AI and AR real-time suggestions and contextual advertising increases content validity, customer satisfaction, and purchase intention when performed in an open way. The integrity of the data is also another mechanism provided by blockchain-based designs that enhances trust (Arora and Sanni, 2019; Yang and Lin, 2024). Nevertheless, these issues can be mitigated as ethical issues regarding data privacy and transparency have to be tackled to allow consumer trust (Dwivedi *et al.*, 2023).

## 5. Discussion

The review found that there were several gaps. First, most research addresses developed markets and does not provide comprehension of new economies with distinctive digital ecosystems and cultural habits (e.g., Zeng *et al.*, 2023). Second, the possibilities of using AI and AR to raise ethical issues such as the privacy of data, algorithmic interpretability, and limits to personalization are not thoroughly investigated (Dwivedi *et al.*, 2023; Verma and Sharma, 2025). Third, the evidence of cross-cultural studies examining the moderating impact of demographic, cultural, and platform-specific attributes that moderate strategy effectiveness in non-Western settings is lacking. As an example, Zhang *et al.* (2025a) demonstrate how Western IT firms modify their activities on Twitter to become oriented towards the cultural specifics of Chinese Weibo and cultural differences as a factor in the formation of engagement strategies. Likewise, Zhang *et al.* (2025b) discovered that motives to use company social media accounts do not exhibit significant differences between Western and Chinese consumers, but the cultural background affects the adoption of relational or transactional motives.

Lastly, blockchain can bring about trust and transparency when it comes to online marketing, and it is a concept that is in its early stages of study.



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## *5.1 Theoretical Interpretation ok Key Findings and Implications*

The results of a systematic review of 48 empirical studies (2015-September 2025) based on the conceptual framework provided in the literature review section can be divided into five main digital marketing strategies impacting the consumer behavior results (engagement, trust, purchase intention, brand loyalty), with the usage of emerging technologies such as AI, AR/VR, and blockchain. It provides both conceptual knowledge and practical suggestions, constraints, and limitations, and outlines of future research. The results prove the multidimensional nature of the influence of the digital marketing strategies on consumer behavior, which is justified by the well-known theories namely: 1) Personalized marketing can be supported by the Elaboration Likelihood Model (ELM) (Petty and Cacioppo, 1986), in which the tailored message generated by AI and AR powered is more effective because cognitive consequent processing is promoted to enhance engagement and trust in case of transparency (Bleier and Eisenbeiss, 2015; Yang and Lin, 2024); 2) the e-commerce experiences can be described using the Technology Acceptance Model (TAM) (Davis, 1989), in which user-friendly and AR/VR enriched platforms can be seen as helpful, leading to an increase in trust and purchasing in a desire (Song *et al.*, 2021; Zeng *et al.*, 2023; Hsu *et al.*, 2024); 3) personalization, responsive interactions, and blockchain-built trust mechanisms are also described by the Relationship Marketing Theory (Berry, 1995) as building the long-term loyalty towards the brand by engaging customers emotionally and ensuring data integrity protection (Kannan, 2017; Arora and Sanni, 2019); and 4) demographics, the nature of the platform, cultural background, privacy issues, and ethical disclosure can moderate these effects (Boerman *et al.*, 2017; Dwivedi *et al.*, 2023). As an example, collectivist cultures (e.g., Asia) place more emphasis on trust driven by their peers, whereas users who likely value privacy insist on clear AI/AR applications.

The review provides a synthesis of the Social Proof Theory, ELM, TAM, and Relationship Marketing Theory into a single conceptual framework with some emerging technologies and moderators of ethics. It also gives a solid base to consider the dynamics of digital marketing on the global platform and the sociocultural environment.

## *5.2 Managerial Implications*

The review provides practical guidance to the practitioners of digital marketing. Firstly, strengthening social media engagement. By formulating



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campaigns based on the use of AI, influencer partnerships, and AR activated content to improve its engagement, especially in non-Western marketplaces. Trust and loyalty are developed with the help of two-way communication (Zhang *et al.*, 2023). Secondly, develop value-driven content by personalizing regular, high-quality works, content, and AI/AR-based content to achieve credibility. Companies should be authentic and transparent to overcome the risks of content fatigue (Ashley and Tuten, 2015; Attri *et al.*, 2024; Verma and Sharma, 2025). Thirdly, optimize online advertising by considering the use of context-based, AR-powered advertisements that help to increase the level of engagement, making sure it remains relevant and free of advertising inconveniences. Respond to the issues related to privacy to build trust (Bleier and Eisenbeiss, 2015; Boerman *et al.*, 2017; Soderstrom *et al.*, 2024; Smink *et al.*, 2024). Fourthly, improve e-commerce usability to create an improved level of trust and reduce cart abandonment, a focus on mobile friendly platforms that are enhanced by AR/VR and a convenient user interface with effective navigation should be prioritized, particularly in emerging markets (Sharma and Lijuan, 2015; Kukar-Kinney *et al.*, 2022; Zeng *et al.*, 2023; Hsu *et al.*, 2024). Finally, respect consumer privacy in personalization by adopting a transparent data policy with blockchain support and open opt-in systems will become the cornerstone of the trust developed in AI-based personalization, which coincides with other guidelines such as GDPR/CCPA (Arora and Sanni, 2019; Dwivedi *et al.*, 2023; Yang and Lin, 2024).

## 6. Limitations and Future Research Avenues

This review, although, being thorough, does have limitations. While some studies address emerging markets (e.g., Zeng *et al.*, 2023), mostly focus on Western contexts, limiting generalizability to culturally distinct digital ecosystems. Only research in the English language was included, and some non-English relevant research may have been omitted. The types of studies are cross sectional, where it is impossible to make causal conclusions (Dwivedi *et al.*, 2021; Zhang *et al.*, 2023). These deficiencies make it obvious that larger, multilingual, and longitudinal studies are necessary.

To address identified gaps in this review future research should explore various avenues for example, ethical dimensions including the concepts of consent, transparency, and data protection in AI and AR-based marketing based on privacy issues (Boerman *et al.*, 2017; Dwivedi *et al.*, 2023; Verma and Sharma, 2025). Going forward, emerging technologies by discussing the role of AI, AR/VR, and blockchain in determining the consumer-brand



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relationships, in particular, the role of blockchain in terms of trust and transparency (Dwivedi *et al.*, 2023; Yang and Lin, 2024). Also focusing on cross-cultural studies by evaluating strategy effectiveness across diverse markets (e.g., India, China, Asia), focusing on cultural moderators (Zeng *et al.*, 2023). Longitudinal research investigating the long-term impact of personalization, AR/VR experiences, and content engagement on brand equity and loyalty (Song *et al.*, 2021; Hsu *et al.*, 2024) would mitigate the potential missing aspects of new research throughout time, and Consumer-Generated Content by exploring the role of online communities and user-generated content in trust and advocacy (Lou and Yuan, 2019; Attri *et al.*, 2024).

The paper narrows down a conceptual framework that connects digital marketing strategies with strategies of consumer behavior and includes AI, AR/VR, and blockchain technologies. It is validating pathways (e.g., personalization to trust, e-commerce usability to loyalty) and sheds light on such moderators as the cultural situation and ethical transparency. The framework guides hypothesis development for empirical research, strategy refinement for AI/AR-enhanced platforms comparative analysis across global markets and sectors.

Researchers should use advanced methods (e.g., structural equation modeling, multi-country surveys) to validate and expand the model, addressing gaps in ethical transparency and cross-cultural dynamics.

## 7. Conclusion

This systematic review synthesizes 48 empirical studies on digital marketing strategies and consumer behavior. The findings confirm the relevance of five key digital marketing strategies in shaping trust, engagement, purchase intention, and brand loyalty (Ashley and Tuten, 2015; Bleier and Eisenbeiss, 2015; Yang and Lin, 2024).

The results outline the increasing relevance of AI driven personalization, AR/VR empowered experiences, blockchain-driven mechanisms of trust, and mobile optimization towards the formation of digital consumer experiences (Dwivedi *et al.*, 2023; Zeng *et al.*, 2023; Hsu *et al.*, 2024).

The theoretical framework will be based on Social Proof Theory, Technology Acceptance Model (TAM), Elaboration Likelihood Model (ELM), and Relationship Marketing Theory (Cialdini, 2009; Davis, 1989; Petty and Cacioppo, 1986; Berry, 1995). It describes the influence of digital marketing strategies over consumer behavior and determines the moderators (demographic factors, type of platform, culture, privacy, and ethical transpar-



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ency) (Boerman *et al.*, 2017; Dwivedi *et al.*, 2023). This framework is an integration of the findings as well as a basis for future research. Nevertheless, the literature review indicates literature gaps. Although some studies draw on the emerging markets, the great majority are dependent on the Western context, and thus they cannot be adapted to a variety of cultural and economic environments (Appel *et al.*, 2020). The concern of data privacy, the transparency of algorithms, and AI/AR use is still a less-proven ethical issue (Dwivedi *et al.*, 2023; Verma and Sharma, 2025). Also, there are provisional studies concerning blockchain and innovative types of AI/AR technologies in digital marketing (Soderstrom *et al.*, 2024). These gaps should be resolved in future studies using cross-cultural comparisons, longitudinal studies, and sector studies. A discussion on the topics of ethical operations, blockchain, and AI/AR based interaction will become important to create an inclusive, responsible, and globally applicable digital marketing strategy. Finally, this review is theoretically relevant as it elaborates a conceptual scheme, and practically, it offers practitioner insights that can be put to the test. It focuses on ethical clarity and technological revolution to improve the efficiency and ethical practices of virtual marketing in a more intricate worldwide climate.

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# Entrepreneurial Scale-Up and Organisational Routines: A Theoretically Informed Integrative Synthesis, 1990-2025

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**Abstract**

This paper examines how organisational routines shape entrepreneurial execution and scale-up strategies in digital and platform-dominant contexts between 1990 and 2025. It addresses a persistent gap in scaling research by explaining how growth intent becomes repeatable delivery through routinised action.

The paper develops a theoretically informed conceptual and integrative synthesis. It combines a Scopus-based literature corpus with foundational scholarship on routines, capabilities, learning, coordination, replication and boundary governance. The evidence base is used to discipline the conceptual argument and to identify how different routine families become salient under changing execution conditions.

The synthesis indicates that scale-up execution depends on five routine families: coordination, replication, control and measurement, learning and search, and boundary routines. Their role changes across successive execution periods. Control and coordination routines support operating-core stabilisation in the 1990s; coordination and boundary routines become central in modular and alliance-based scaling in the

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2000s; replication and measurement routines dominate platform-oriented scale-up in the 2010s; and learning, boundary and control routines become critical under shock-prone and nonmarket selection conditions after 2020.

The analysis relies on an English-language, Scopus-indexed evidence base and on interpretive synthesis rather than direct empirical testing. The findings should therefore be read as theoretically grounded propositions for future longitudinal and cross-sectoral research.

The paper contributes a historically informed trigger-to-mechanism framework showing how the same routine family may shift from enabling to constraining scale-up as execution conditions change. It advances scaling-as-capability research by specifying the organisational mechanisms through which routines support or limit repeatable growth.

*Keywords:* Scale-up; entrepreneurial execution; organisational routines; structured historical synthesis; boundary governance; Historical periodization

*Crescita dimensionale delle imprese imprenditoriali (scale-up) e routine organizzative: una sintesi integrativa fondata su prospettive teoriche, 1990–2025*

**Sommario**

Il presente contributo analizza il ruolo delle routine organizzative nei processi di esecuzione imprenditoriale e di scale-up nei contesti digitali e dominati dalle piattaforme tra il 1990 e il 2025. Attraverso una sintesi concettuale e integrativa teoricamente fondata, basata su un corpus Scopus e su contributi fondamentali relativi a routine, capacità, apprendimento, coordinamento, replicazione e governance dei confini organizzativi, il paper esamina come l'intenzione di crescita possa trasformarsi in capacità di esecuzione ripetibile.

L'analisi individua cinque famiglie di routine – coordinamento, replicazione, controllo e misurazione, apprendimento e ricerca, routine di confine – il cui ruolo varia in funzione delle condizioni storiche di esecuzione. Il contributo propone un framework trigger-to-mechanism che mostra come le routine possano agire sia come fattori abilitanti sia come vincoli dello scale-up. In tal modo, il lavoro contribuisce alla prospettiva dello scaling-as-capability, offrendo proposizioni teoricamente fondate per future ricerche longitudinali e intersettoriali.

*Parole chiave:* Scale-up; esecuzione imprenditoriale; routine organizzative; sintesi integrativa; governance dei confini organizzativi; periodizzazione storica



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## 1. Introduction

Scale-up is often described as the 'valley of death' between invention and impact: ventures can demonstrate product–market fit yet fail when episodic entrepreneurial action must be converted into repeatable execution (Aulet, 2013; Markham *et al.*, 2010). This transition is not reducible to resources or market opportunity; it is fundamentally an organising problem – how dispersed know-how, fragile coordination, and improvisational problem-solving are translated into reliable patterns of action. Routines- recurrent patterns that connect coordination, cognition, and motivation- provide a privileged lens on that problem, explaining both stability and endogenous change in organisational action (Nelson and Winter, 1982; Feldman and Pentland, 2003).

The execution problem has grown more consequential in the 2020s as scale-up unfolds within data-intensive digital/platform ecosystems and distributed production networks, under heightened nonmarket selection and shock-prone operating environments (Gawer and Cusumano, 2014; Eggers, 2020; Polidoro, 2020). Founders, managers, investors, and policy actors therefore need a mechanism-explicit account of how execution infrastructures evolve under shifting historical constraints, rather than generic 'success factor' catalogues.

Recent integrative work has clarified the concept of scaling, conceptualising it as a dynamic capability and harmonising definitions (Jansen *et al.*, 2023; Coviello *et al.*, 2024). What remains underspecified is the mechanism-level answer: through which routines does growth intent become repeatable delivery, and how can the same routine family shift from enabling to constraining scale-up as execution contexts change? This paper addresses that gap by asking two research questions:

**RQ1:** *Which families of routines dominate successive periods of scale-up execution, and what historically situated triggers accompany their emergence?*

**RQ2:** *Through which mechanisms do these routine families contribute to scale-up?*

**Definition-Execution strategy:** the routinised configuration of managerial decision rights, coordination mechanisms, performance and learning systems, and boundary governance that translates growth intent into repeatable delivery at increasing scale. Product-market positioning, financing choices, and founder traits are explicitly excluded from the scope of this paper.



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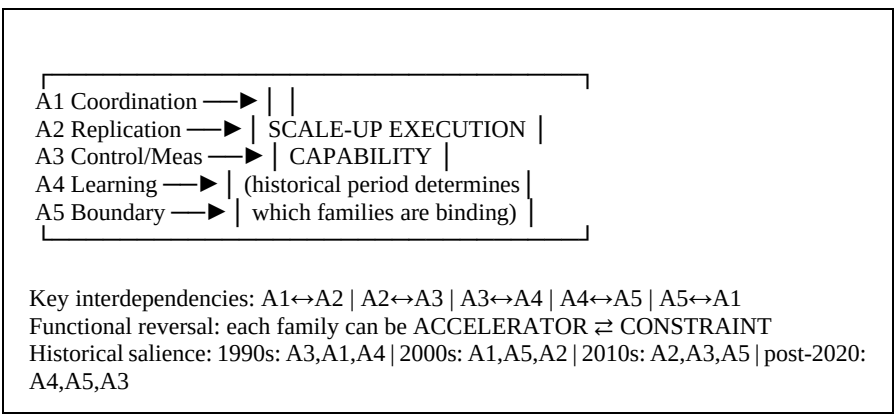
This paper makes three contributions. First, it synthesises five streams of routine scholarship around a common execution-capability argument rather than a descriptive taxonomy. Second, it provides a historically informed trigger-to-mechanism mapping that specifies when and why routine configurations shift from accelerators to brakes. Third, it derives five propositions for future empirical examination, each anchored in documented mechanisms and bounded by contextual conditions.

The paper is structured as follows. Section 2 builds the theoretical framework around a shared execution-capability argument and identifies the unresolved gap each stream contributes to. Section 3 describes the synthesis approach and evidence base. Section 4 presents the periodised findings. Section 5 discusses cross-period tensions and derives propositions. Section 6 concludes.

## 2. Theoretical Background: Routines as Execution Infrastructure

This section builds a cumulative theoretical argument in five steps. The connecting thread is an unresolved question in scaling research: if routines explain how organisations coordinate, replicate, learn, and govern boundaries, why does the same family of routines sometimes accelerate scale-up and sometimes constrain it? Each subsection identifies what an existing stream of scholarship contributes to answering this question and what it leaves underspecified. Section 2.6 synthesises the streams into the gap this paper addresses. Figure 1 illustrates the logic of the section.

*Fig. 1: Routine Families as Execution Infrastructure (Schematic)*






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## *2.1 Routines, Stability, and Endogenous Change*

Understanding why scale-up execution so often fails despite apparent organisational capability requires a theory of how routines generate both reliability and unintended drift. The evolutionary tradition establishes that routines economise on cognition and coordinate under bounded rationality (Nelson and Winter, 1982). Routine dynamics research shows that this reliability coexists with endogenous change: ostensive understandings provide continuity, yet performative enactments vary, creating micro-variations from which selection and retention reshape the routine over time (Feldman and Pentland, 2003). Large-scale evidence confirms that 'the same' routine can generate many unique patterns without external intervention (Pentland *et al.*, 2011), while generative models formalise how variation and selective retention suffice to explain routine change (Pentland *et al.*, 2012). Materiality and distributed agency add a further layer: routines are mediated by artefacts and technologies that both constrain and enable performance (D'Adderio, 2008).

What this stream leaves open for scaling research is the directional question: under what conditions does enactment generate convergence toward reliable execution rather than performative drift? The stability-change duality is foundational for scale-up- the execution process requires an operating core reliable enough to meet unit economics thresholds while preserving reconfiguration capacity. These conditions depend on the execution context and selection environment examined in the remaining subsections.

## *2.2 Learning, Search, and Adaptation-Selection Interdependence*

A second unresolved tension for scale-up concerns the relationship between routinised learning and external selection. Classical models emphasise adaptive search under limited cognition and the persistent tension between exploration and exploitation (Levinthal and March, 1981; March, 1991). Levinthal (1991) argues that adaptation and environmental selection are interrelated: ventures learn while being selected, and what is learned is shaped by the feedback environment. Deliberate learning mechanisms- experience accumulation, knowledge articulation, and codification- transform local trial-and-error into transferable capability (Zollo and Winter, 2002), reducing the risk that scaling amplifies errors faster than learning can correct them. Longitudinal models further suggest that sustained performance often requires episodic reorientation rather than incremental refinement alone (Lant and Mezias, 1992).

The gap is that whether routinised learning translates into scalable



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delivery depends on the external selection environment- ventures must secure resource access and legitimacy while surviving market and nonmarket selection pressures. What counts as adequate learning varies with the competitive and regulatory environment in which scaling unfolds, motivating the historically situated perspective in Section 4.

### *2.3 Coordination and Authority in the Management of Interdependencies*

Scaling intensifies coordination demands by expanding the division of labour and multiplying interdependencies among tasks, decisions, and units. Coordination perspectives show that authority and organisational design help discover workable alignments among technologically interdependent activities (Foss, 2001), while the knowledge-based view stresses that firms embody social knowledge of coordination that is difficult to price or contract (Kogut and Zander, 1996). Computational evidence confirms that design elements interact: hierarchies, incentives, and decision decompositions exhibit complementarities that either stabilise execution or induce failure when misaligned (Rivkin and Siggelkow, 2003). At the micro-process level, interdependent routines require ongoing 'routine work'- flexing, stretching, and improvisation- to align performances across actors and situations (Deken *et al.*, 2016), and clusters of routines can constrain change even when individual routines vary (Kremser and Schreyögg, 2016).

The key insight for scale-up is that performance depends not on 'having coordination routines' but on building compatible bundles that absorb complexity without collapsing decision velocity. Which routines complement each other and at which scale- the bundle logic- is what the literature leaves unmapped across historical contexts, and it is precisely this mapping that the trigger-to-mechanism analysis in Section 4 provides.

### *2.4 Routine Replication, Communities, and Incentives*

Replication is the mechanism through which scale-up converts a local solution into multi-site performance. Yet replication is rarely literal: it combines templates with situated adaptation, and failures typically arise from neglecting tacit components and conditions of use (Friesl and Larty, 2013). Communities within firms localise know-how and define incentive and identity structures that shape replication power, inertia, and search potential (Cohendet and Llerena, 2003). More recent work conceptualises replication as



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co-creation: crafting 'the same' routine across locations requires effortful repair and sociomaterial distribution rather than passive rollout (D'Adderio and Pollock, 2020), and replication can support innovation when it preserves a recognisable core while enabling recombination (Schmidt *et al.*, 2019).

What the replication literature does not specify is how the design of replication routines must change as execution contexts shift. The social and artefact infrastructure required to replicate a lean manufacturing template in the 1990s differs from that needed to replicate a platform onboarding playbook in the 2010s or a regulatory compliance protocol post-2020. This historically contingent dimension of replication motivates the periodised perspective in Section 4.

### *2.5 Boundary Routines: Alliances, Ecosystems, and Nonmarket Selection*

As scale-up increasingly unfolds across organisational boundaries-through partnerships, platforms, and regulated value chains- execution routines must extend beyond the firm. Interorganisational routines governing collaboration, knowledge sharing, and coordination have been shown to predict alliance performance (Zollo, Reuer and Singh, 2002), and alliance management capability can be conceptualised as a routinised second-order competence comprising coordination, learning, and transformation routines across an alliance portfolio (Schilke and Goerzen, 2010). Beyond markets, regulatory review functions as a nonmarket selection regime in which agency cognition shapes evaluation duration (Polidoro, 2020).

The literature establishes that boundary routines matter but does not specify when they become the primary constraint on scale-up rather than a supporting function. The post-2020 period provides a useful context for examining when boundary governance becomes constitutive of execution capability rather than merely contextual. This possible shift is interpreted in Section 4.4.

### *2.6 Synthesis: The Unresolved 'How' in Scaling-as-Capability*

The five streams converge on a common lacuna. Recent integrative work positions scaling as a dynamic capability comprising routines for expansion, replication, and synchronisation (Jansen *et al.*, 2023), and definitional harmonisation clarifies the distinctions among scaling, scalability, and scale-up as a developmental phase (Coviello *et al.*, 2024). What remains unspecified is the mechanism-level logic: (i) which routine families are foregrounded



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under which execution conditions; (ii) through what mechanisms they contribute to scale-up; and (iii) when and why the same family shifts from enabling to constraining. This paper addresses that triple under-specification by organising the five streams into a historically informed trigger-to-mechanism framework in which execution conditions- infrastructure, selection environment, interdependence structure- determine which routine families become binding at each period.

Read through a knowledge-management lens, these five families represent the mechanisms through which firms articulate, codify, transfer, monitor, and govern execution knowledge under changing scale-up conditions.

## 3. Research Design: A Conceptual and Integrative Synthesis with Historically Informed Periodisation

### *3.1 Methodological Approach*

This paper adopts a theoretically informed conceptual and integrative synthesis. Its purpose is not to provide a systematic review, a bibliometric study or an archival historical analysis, but to develop a mechanism-based conceptual explanation of how organisational routines contribute to entrepreneurial scale-up execution under changing contextual conditions.

The synthesis draws on two complementary sources: a Scopus-based literature corpus and a mechanism-centric set of foundational contributions on routines, capabilities, learning, coordination, replication and boundary governance. The Scopus corpus is used for descriptive transparency and topical orientation, not for statistical inference or for detecting turning points. The foundational literature is used to build the conceptual mechanism linking routine families to scale-up execution.

The paper is historically informed in a limited and specific sense. Periodisation is used as an analytical organising device to distinguish successive execution conditions, not as evidence of definitive historical ruptures. This positioning is consistent with calls for reflexivity in the use of historical framing in management and organisation studies, where period labels should be treated as interpretive choices rather than neutral containers or causal variables (Rowlinson, Hassard, and Decker, 2014; Wadhwani, Suddaby, Mordhorst, and Popp, 2018).

The resulting contribution is therefore conceptual. The paper proposes an interpretive trigger-to-mechanism framework that can be refined, challenged and tested by future longitudinal, archival or comparative empirical research.



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### 3.1.1 Periodisation Logic: Analytical Markers of Changing Execution Conditions

The paper distinguishes four broad execution periods: 1990–1999, 2000–2009, 2010–2019 and 2020–2025. These periods should not be interpreted as statistically detected breaks or as historically definitive ruptures. They are used as analytical markers that organise changes in the execution conditions under which scale-up takes place.

The first period, 1990–1999, is treated as an ideal-typical baseline for operating-core stabilisation, process discipline and basic coordination beyond founder-centric control. The second period, 2000–2009, captures the growing relevance of modularity, outsourcing and alliance-based scaling, which increased the importance of coordination and boundary routines. The third period, 2010–2019, reflects the diffusion of digital platforms, cloud infrastructures, ecosystem orchestration and measurement-based replication. The fourth period, 2020–2025, captures the heightened salience of shocks, regulatory scrutiny, resilience and nonmarket selection.

The periodisation is therefore not used to claim that routines changed abruptly at fixed calendar boundaries. Rather, it provides a structured way to compare how different routine families may become more or less salient as execution environments evolve. The framework should be read as a conceptual interpretation of temporal change, not as a definitive historical reconstruction.

## *3.2 Evidence Base and Source Selection*

The evidence base was constructed in two stages. First, a Scopus search was conducted to identify publications combining organisational routines or capabilities with entrepreneurship, scaling, scale-up, firm growth or related execution-oriented terms. The search covered the period from 1990 to 2025 and was conducted in February 2026 using TITLE-ABS-KEY fields. The initial search returned 229 records.

Second, the Scopus-based corpus was complemented by a mechanism-centric seed set of 24 foundational works on routines, learning, coordination, replication, capabilities, boundary governance and scaling-as-capability. These works correspond to the foundational contributions used in Section 2 to define the five routine families and to position scale-up as an execution capability. They provide the conceptual basis for interpreting how routine families contribute to scale-up execution.

The seed set was constructed according to three inclusion criteria. First, a



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work was included when it introduced or substantially refined one of the mechanism categories used in the paper. Second, it was included when it provided a recognised theoretical anchor for one of the five routine families. Third, it was included when it was necessary to interpret how routines operate as execution mechanisms under changing scale-up conditions. The seed set is therefore theoretical and mechanism-oriented rather than statistically representative.

The 24 foundational works are grouped as follows:

*Table 1: Mechanism-centric seed set*

| *Mechanism category* | *Foundational anchor works* |
|---|---|
| Routine stability and change | Nelson & Winter (1982); Feldman & Pentland (2003); Pentland *et al.* (2011); Pentland *et al.* (2012); D'Adderio (2008) |
| Learning and search | Levinthal & March (1981); March (1991); Levinthal (1991); Zollo & Winter (2002); Lant & Mezias (1992) |
| Coordination and interdependence | Foss (2001); Kogut & Zander (1996); Rivkin & Siggelkow (2003); Deken *et al.* (2016); Kremser & Schreyögg (2016) |
| Replication and transfer | Friesl & Larty (2013); Cohendet & Llerena (2003); D'Adderio & Pollock (2020); Schmidt *et al.* (2019) |
| Boundary governance and nonmarket selection | Zollo, Reuer & Singh (2002); Schilke & Goerzen (2010); Polidoro (2020) |
| Scaling-as-capability | Jansen *et al.* (2023); Coviello *et al.* (2024) |

*Source: Author's elaboration.*

The seed set is not treated as part of the Scopus core subset. Its role is to anchor the conceptual categories used to interpret the Scopus-based literature and to develop the trigger-to-mechanism framework. The Scopus corpus, by contrast, is used for descriptive transparency and topical orientation. Neither source is used to infer statistical trends or to detect historical turning points.

The Scopus search string was:

TITLE-ABS-KEY (routine* OR "organisational routine*" OR "routine dynamic*" OR capability OR "dynamic capability" OR coordination OR replication OR "interorganisational routine*") AND TITLE-ABS-KEY (scale-up OR scaling OR "firm growth" OR "high growth" OR entrepreneurship OR "new venture*" OR startup*) AND PUBYEAR > 1989 AND PUBYEAR < 2026.

## *3.3 Screening and Inclusion Criteria*

The 229 records retrieved from Scopus were screened at title and abstract level. A record was retained in the core subset when it met two conditions. First, it had to show a clear connection to organisational routines,



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capabilities, coordination, replication, learning, measurement or boundary governance. Second, it had to show a clear connection to scaling, scale-up, entrepreneurial growth, firm growth or execution processes.

Records were excluded when they focused only on individual-level entrepreneurship, purely technical domains, general innovation topics without organisational execution content, or growth outcomes without a meaningful connection to routines or capabilities. After this screening, 87 records were retained as the core subset.

The screening flow was as follows:

| *Screening stage* | *Records* |
|---|---|
| Initial Scopus export | 229 |
| Records excluded after title and abstract screening | 142 |
| Final core subset retained for conceptual synthesis | 87 |

The 142 excluded records were removed because they did not meet one or both of the two inclusion conditions specified above. At title and abstract level, exclusions were grouped into four substantive categories: individual-level entrepreneurship without organisational execution content; purely technical or domain-specific studies without a routine/capability mechanism; general innovation, growth or performance studies without a clear scaling-execution link; and records with insufficient relevance, ambiguous scope or no meaningful connection to the paper's routine-family framework.

Because the exclusion categories were applied during title and abstract screening as substantive relevance criteria rather than as mutually exclusive statistical bins, the figures reported above should be read as a transparent screening flow, not as a PRISMA-style systematic review procedure.

The core subset is used to support the conceptual synthesis and to provide evidence of topical relevance across the period examined. It should not be interpreted as a systematic review sample in the strict sense. The screening procedure was designed to discipline source selection and reduce arbitrariness, not to claim exhaustive coverage of the literature.

The 1990–1999 period includes only four records in the core subset. For this reason, it is treated as an ideal-typical baseline, triangulated with foundational routine and organisational learning scholarship, rather than as a robust corpus-derived finding.



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*Table 2: Evidence base and screening flow*

| *Evidence component* | *Records / works* | *Function in the synthesis* |
|---|---|---|
| Initial Scopus export | 229 | Provides the searchable literature space used for descriptive transparency and topical orientation. |
| Records excluded after title and abstract screening | 142 | Removed because they did not meet the inclusion criteria relating to organisational routines/capabilities and scaling/execution processes. |
| Scopus core subset retained | 87 | Supports the conceptual synthesis and provides evidence of topical relevance across the period examined. |
| Mechanism-centric seed set | 24 | Provides foundational theoretical anchors for the five routine families and for the scaling-as-capability argument. |
| 1990–1999 core-subset records | 4 | Used only for baseline triangulation; the period is treated as an ideal-typical baseline rather than as a robust corpus-derived finding. |

*Source: Author's elaboration.*

## *3.4 Analytical Classification and Synthesis*

The retained sources were interpreted through five routine families derived from the theoretical framework: coordination routines, replication routines, control and measurement routines, learning and search routines, and boundary routines. These categories are used as conceptual lenses for organising the synthesis, not as variables measured through a formal quantitative coding procedure.

For each source, attention was given to the routine-related mechanism most directly connected to scale-up execution. Where relevant, sources were associated with more than one routine family, since coordination, replication, learning, measurement and boundary governance often interact in practice. This interpretive classification supports the development of the trigger-to-mechanism framework presented later in the paper.

No formal inter-coder reliability statistics are reported, because the study is not designed as a systematic content analysis. The classification should therefore be read as a transparency-enhancing interpretive procedure, rather than as a fully replicable coding exercise. Future empirical research could extend this framework by applying double coding, reporting agreement statistics, and testing the salience of routine families across sectors, time periods and organisational contexts.

The synthesis was then developed by comparing how different execution conditions appear to make particular routine families more or less relevant for scale-up. The resulting framework does not claim to prove causal shifts in routine salience. Rather, it offers a theoretically grounded interpretation



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of how routines may support or constrain scale-up under different contextual conditions.

## 4. Findings: Periodised Patterns of Execution Routines (1990-2025)

This section presents an interpretive synthesis of period-specific execution conditions and routine-family salience. Period labels are ideal-typical analytical markers rather than empirically detected breaks. Table 1 summarises the evidence base and screening flow, while Table 3 provides an interpretive mapping between execution conditions, routine families and scale-up mechanisms.

### *4.1 1990–1999: From Entrepreneurial Improvisation to Disciplined Process*

*(Ideal-typical baseline; n=4 core-subset records; triangulated with foundational scholarship)* The 1990s scaling problem centres on stabilising basic process reliability as ventures grow beyond founder-centric coordination- a transition Nelson and Winter (1982) theorise as the shift from ad hoc action to recurrent patterns that encode learning and coordinate under bounded rationality. In practice, this period sees strong emphasis on quality routines, standard operating procedures, and early measurement and control: Kaplan and Norton's (1992) Balanced Scorecard becomes a canonical scalable performance system, and lean manufacturing diffuses as a discipline for variance reduction (Womack *et al.*, 1990). A concrete illustration is offered by the growth of franchise-based service chains such as McDonald's and Subway, where coordination routines and basic replication templates allowed rapid multi-site expansion while preserving operational consistency- a case where control/measurement routines (A3) and coordination routines (A1) act as growth accelerators.

As March (1991) cautions, early process discipline carries the risk of competence traps when exploitation crowds out exploration. For innovation-intensive scale-ups emerging in the late 1990s- early internet software ventures- this tension between routine stability and adaptive search becomes the central execution problem carried forward into the following period.



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### *4.2 2000–2009: Scaling through Reconfiguration, Modularity, and Alliance Routines*

The 2000s shift the execution problem from internal process stabilisation to managing interdependencies across units and partners. The internet and ERP platforms enable global modular production, redistributing coordination burdens across firm boundaries (Baldwin and Clark, 2000; Sturgeon, 2002). Authority and decision rights that once resided within a single management team must be distributed across networks of suppliers, licensees, and alliance partners- a configuration demanding both coordination routines (A1) and boundary routines (A5) as primary execution mechanisms (Foss, 2001; Kogut and Zander, 1996). Zollo, Reuer and Singh (2002) document empirically that interorganisational routines are the primary predictor of alliance performance, confirming that boundary governance is constitutive of scaling in this period.

Concrete examples include the expansion of Google's advertising ecosystem and Amazon's third-party marketplace through partner-governance and revenue-sharing routines; and the scaling of contract manufacturing networks in electronics- exemplified by the rise of Foxconn- through modular replication templates that reproduced production processes across dozens of sites (Baldwin and Clark, 2000; Sturgeon, 2002). Within the firm, reconfiguration becomes a key lever: Karim (2009) finds that business unit reorganisation relates non-linearly to innovation outcomes, with learning routines mediating the effect under structural change.

### *4.3 2010–2019: Replication Playbooks and the Rise of Scale-Up Management*

The 2010s witness the managerialisation of scale-up: playbooks, templates, and data-driven OKR systems are codified as explicit replication infrastructures in technology and service firms. Routine dynamics research provides the theoretical underpinning- routines change through enactment, and organisations can design replication while preserving adaptability (Feldman and Pentland, 2003; Pentland *et al.*, 2012). Canonical examples include the spread of Agile/Scrum frameworks as replication-and-adaptation routines in software development; the adoption of OKR systems, first at Google and subsequently across Silicon Valley, as measurement-discipline routines (A3) for aligning distributed execution; and the scaling of platform ecosystems – Uber, Airbnb, Spotify – through orchestration routines that governed complementors and enforced standards without direct ownership (Gawer and Cusumano, 2014; Jacobides *et al.*, 2018).



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Replication in this period is never simple copying. D'Adderio and Pollock (2020) document that crafting 'the same' routine across sites requires sociomaterial repair and artefact distribution. Cohendet and Llerena (2003) show that community context shapes replication power and inertia. Schmidt, Braun and Sydow (2019) demonstrate that replication can support innovation when it preserves a recognisable core while enabling recombination. Scaling success in the 2010s depends on orchestrating routine families as a configuration, not on optimising any single routine in isolation.

### *4.4 2020–2025: Regulatory Endurance, Crisis Routines, and Execution under Nonmarket Selection*

Post-2020 execution is reshaped by two converging forces: pervasive shocks – pandemic, supply disruptions, geopolitical instability – and intensified nonmarket selection through regulation, social legitimacy demands, and sustainability scrutiny. Polidoro (2020) shows that regulatory review is shaped by the cognitive structure of nonmarket selectors: greater knowledge about novel technologies can increase evaluation incongruities and lengthen review times, making routinised regulatory engagement a primary execution constraint in innovation-intensive sectors.

Concretely, COVID-19 forced healthcare delivery firms such as Teladoc and NHS digital services to rapidly scale remote consultation and triage routines, demonstrating the centrality of boundary and coordination routines under shock conditions. The GDPR compliance wave required SaaS scale-ups to institutionalise data-governance routines as a prerequisite for European market access. Berente *et al.* (2016) show that routines function as 'shock absorbers' during major system transformations, protecting the operating core. Tidhar, Hallen and Eisenhardt (2025) provide recent evidence that unit-economics discipline- a control/measurement routine (A3)- is associated with sustainable firm growth, suggesting that measurement routines may shift from growth accelerators to brakes against premature scaling depending on execution conditions.



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*Table 3: Periodisation of scale-up challenges and dominant routine families*

| *Period* | *Dominant execution problem* | *Routine families foregrounded* | *Illustrative evidence* |
|---|---|---|---|
| 1990–1999 (baseline) | Process reliability and basic coordination beyond founder-centric control | A3 Control/measurement; A1 Coordination; A4 Learning (emerging) | Kaplan & Norton (1992); Womack *et al.* (1990); Pentland & Rueter (1994); Nelson & Winter (1982); March (1991) |
| 2000–2009 | Managing modular interdependencies and scaling via partners and alliances | A1 Coordination by authority; A5 Boundary/alliance routines; A2 Replication | Baldwin & Clark (2000); Sturgeon (2002); Foss (2001); Zollo, Reuer & Singh (2002); Schilke & Goerzen (2010); Karim (2009) |
| 2010–2019 | Replicating playbooks while preserving adaptation at platform scale | A2 Replication templates; A3 Measurement discipline; A5 Ecosystem orchestration | Feldman & Pentland (2003); Pentland *et al.* (2012); D'Adderio & Pollock (2020); Gawer & Cusumano (2014); Jacobides *et al.* (2018) |
| 2020–2025 | Execution under shocks and intensified nonmarket selection | A5 Boundary/regulatory routines; A3 Measurement as brake; A4 Learning/search | Berente *et al.* (2016); Eggers (2020); Polidoro (2020); Anand *et al.* (2012); Tidhar *et al.* (2025) |

*Source: Author's elaboration.*



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*Table 4: Trigger-to-Mechanism Interpretive Mapping (RQ1)*[1]

| *Period* | *Trigger cluster* | *Execution constraint re-weighted* | *Routine families* | *Scale-up mechanism (RQ2)* | *Representative sources* |
|---|---|---|---|---|---|
| 1990–1999 | Quality/process movements; early enterprise IT; early globalisation | Stabilise operating core; coordinate under bounded rationality | A3, A1, A4 | Stabilising the operating core; synchronising interdependencies | Nelson & Winter (1982); Pentland & Rueter (1994); Kaplan & Norton (1992) |
| 2000–2009 | Modularity and outsourcing; global value chains; distributed alliances | Govern cross-firm interdependence; replicate templates across sites and partners | A1, A5, A2 | Synchronising interdependencies; multi-site replication; boundary governance | Baldwin & Clark (2000); Zollo *et al.* (2002); Karim (2009) |
| 2010–2019 | Cloud/mobile infrastructures; platform ecosystems; datafication | Scale replication with measurement discipline; govern complements and partner interdependence | A2, A3, A5 | Multi-site replication; preventing premature scaling; ecosystem governance | Gawer & Cusumano (2014); Jacobides *et al.* (2018); Pentland *et al.* (2012) |
| 2020–2025 | Systemic shocks; intensified regulation; resilience imperative | Reorient and maintain compliance; avoid premature scaling under high uncertainty | A4, A5, A3 | Enduring non-market selection; rapid reorientation; measurement as brake | Berente *et al.* (2016); Polidoro (2020); Tidhar *et al.* (2025) |

*Source: Author's elaboration.*

## *4.5 Answers to RQ1 and RQ2*

*Answer to RQ1.* The synthesis suggests that different routine families become more salient under different execution conditions. In the 1990s, coordination and control/measurement routines are foregrounded as mechanisms

[1] The table is an interpretive mapping rather than a causal test. It summarises theoretically plausible relationships between execution conditions, routine families and scale-up mechanisms, and is intended to be refined through future longitudinal, archival or comparative empirical research. Representative sources include both Scopus core-subset records and foundational anchor works. Foundational anchor works support mechanism interpretation, while core-subset records support topical relevance within the period examined. The 1990–1999 row should therefore be read as an ideal-typical baseline supported mainly by foundational routine and organisational learning scholarship and only four core-subset records.



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for stabilising process reliability beyond founder-centric orchestration. In the 2000s, reconfiguration and boundary routines become more relevant for governing modularity, outsourcing and alliance-based growth. In the 2010s, replication playbooks and measurement infrastructures become central to multi-unit and platform-oriented expansion. After 2020, regulatory-engagement, crisis-response and learning routines become more salient under heightened nonmarket selection and shock-prone conditions.

*Answer to RQ2.* The synthesis identifies five recurrent mechanisms through which routines may contribute to scale-up: stabilising the operating core; enabling multi-site replication; synchronising interdependencies; preventing premature scaling through measurement discipline; and supporting regulatory and ecosystem endurance through boundary routines.

## 5. Discussion: Toward a Historically Informed Theory of Execution Capability

The synthesis supports a theoretically delimited claim: across predominantly digital and platform-oriented contexts, scale-up execution appears to rely on a limited repertoire of routine families, but the role of those families varies with changing execution conditions. The contribution is not the routine-family taxonomy per se. Rather, the paper offers a historically informed conceptual framework for interpreting when and why routine configurations may shift from accelerators to constraints, thereby addressing the underspecification of the "how" in scaling-as-capability research (Jansen *et al.*, 2023; Coviello *et al.*, 2024).

Three cross-period tensions are particularly salient for theory development and motivate the propositions below.

### *5.1 The Measurement-Learning Tension*

Control/measurement routines that stabilise quality, cash, and unit economics both accelerate scaling and risk preventing it: the same discipline that reduces variance may crowd out exploratory learning when uncertainty remains high (Kaplan and Norton, 1992; March, 1991; Tidhar *et al.*, 2025). The OKR systems that fuelled growth at many platform firms in the 2010s became sources of execution rigidity when those firms attempted to innovate beyond their established models- a pattern consistent with March's (1991) exploitation-exploration trade-off. Managerially, this implies calibrating measurement discipline to uncertainty: high-variance environments require



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exploration buffers within the control system, while low-variance, high-scale environments reward tighter discipline.

### *5.2 The Replication-Adaptation Tension*

Replication routines are not simple copying: successful scale-up requires templating that preserves local adaptation, and transfer is co-created through artefacts and repair work (Friesl and Larty, 2013; D'Adderio and Pollock, 2020). Platform scale-ups expanding into new regulatory jurisdictions- as illustrated by the adaptation of host onboarding routines across different legal environments- must maintain templates standardised enough for consistent quality while remaining flexible enough to accommodate local constraints. The implication is that communities and incentive structures matter as much as templates for replication effectiveness.

### *5.3 The Boundary-Extension Tension*

Boundary routines increasingly reshape the nature of execution by extending coordination and learning beyond the firm and exposing growth to nonmarket selection. Alliance and ecosystem governance routines therefore become constitutive of what replication and coordination mean at scale- not ancillary to them (Zollo, Reuer and Singh, 2002; Schilke and Goerzen, 2010; Jacobides *et al.*, 2018; Polidoro, 2020). The post-2020 period makes this especially visible: scale-ups in healthcare, fintech, and climate technology face regulatory timelines that can dwarf internal execution cycles, making compliance-by-design routines a primary growth constraint rather than an administrative afterthought.

### *5.4 Propositions for Future Empirical Examination*

The following five propositions are directions for future research, derived from the cross-period tensions above. They are conjectures suitable for longitudinal or comparative examination using the routine-family framework in Appendix A, not hypotheses already prepared for falsification.

*P1- Interdependence-driven coordination:* As technical and organisational interdependence increases during growth, scale-up performance becomes contingent on coordination routines (A1) that routinise decision rights, sequencing, and cross-unit integration. This relationship is moderated



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by the degree of technological modularity in the firm's production architecture (Kogut and Zander, 1996; Foss, 2001; Jones and Schou, 2023).

*P2- Replication with social infrastructure:* The effectiveness of replication routines (A2) in accelerating expansion and reducing performance variance is strengthened when communities and incentive structures support faithful enactment with controlled local adaptation. Without social infrastructure, template-based replication reproduces drift alongside best practice (Cohendet and Llerena, 2003; Friesl and Larty, 2013; Schmidt *et al.*, 2019).

*P3- Measurement discipline and premature scaling:* Control/measurement routines (A3)- particularly unit-economics discipline and KPI cadence- reduce the likelihood of premature scaling and increase the probability of sustaining profitable growth; however, when technological uncertainty remains high, the same routines risk suppressing exploratory learning and stalling adaptation (March, 1991; Tidhar *et al.*, 2025).

*P4- Nonmarket selection and boundary routines:* In high-regulation or legitimacy-sensitive environments, boundary routines (A5)- regulatory engagement and compliance-by-design- become primary determinants of scalability, outweighing purely internal efficiency gains. This effect is stronger in sectors characterised by novelty-based regulatory review (Polidoro, 2020; Schilke and Goerzen, 2010).

*P5- Shock conditions and routine renewal:* Under pervasive shocks and major system transformations, ventures that combine shock-absorbing coordination routines with deliberate learning/search routines (A4) are more likely to renew execution capability without destabilising the operating core. Over-investment in control/measurement routines under shock conditions risks rigidity failure (Berente *et al.*, 2016; Anand *et al.*, 2012; Levinthal, 1991).

## 6. Conclusion

This paper reconceptualises scale-up as an execution capability: a routinised portfolio of coordination, replication, control, learning and boundary mechanisms that translates growth intent into repeatable delivery under changing contextual conditions. The analysis is presented as a theoretically informed conceptual and integrative synthesis. Periodisation is used as an analytical device for organising changes in execution conditions, while the trigger-to-mechanism framework is offered as an interpretive contribution to be refined by future empirical research.

Addressing RQ1, the synthesis suggests that routine-family salience varies across execution conditions. Coordination and measurement routines are



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foregrounded in the 1990s as mechanisms for operating-core stabilisation; coordination and boundary routines become more relevant in the 2000s as modularity and alliance-based scaling expand; replication and measurement routines become central in the 2010s as platform-oriented expansion intensifies; and learning/search and boundary routines become more salient after 2020 under shock-prone and nonmarket selection conditions.

Addressing RQ2, the paper identifies five mechanisms through which routines may support scale-up: stabilising reliability, enabling multi-site replication, synchronising interdependencies, disciplining unit economics and sustaining regulatory and ecosystem endurance.

Three integrative implications follow. First, routine families exhibit functional reversals: measurement and control accelerate scaling when variance reduction is the binding constraint, yet operate as brakes when exploration is required; boundary routines transform replication from copying into negotiated co-creation across sites and partners. Second, execution strategy is configurational: performance hinges on complementarities and sequencing among routine families, not their isolated presence. Third, the historical expansion of selection environments implies that scaling increasingly entails regulatory and ecosystem endurance, making boundary routines constitutive of execution capability.

The study has limitations. The evidence base privileges English-language, Scopus-indexed sources and relies on title and abstract screening for the core subset. The 1990-1999 period rests on only four core-subset records and is therefore treated as an ideal-typical baseline rather than as a robust corpus-derived finding. The proposed periodisation should be read as a conceptual scaffold, not as proof of historically definitive ruptures. Future research should test, refine or challenge the framework through longitudinal designs, archival reconstruction and process data on routine enactment, transfer and reconfiguration.

For practitioners, the framework treats scale-up governance as routine-portfolio design: clarify decision rights as interdependencies rise; invest in replication infrastructure that preserves local adaptation; institutionalise measurement discipline calibrated to uncertainty; and build boundary routines for ecosystem governance and regulatory engagement. Doing so makes ‘execution capability’ an explicit design object-one that can be built and rebalanced as historical conditions shift.



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# Appendix A. Routine Family Interpretive Scheme

This appendix provides conceptual definitions and decision rules for the five routine families. The scheme supports transparent interpretive classification and is intended primarily as a guide for future empirical replication. Scoring formulas and confidence-factor calculations are not included, consistent with the paper's positioning as a theoretically informed conceptual synthesis. Future empirical studies may operationalise this scheme through double-coding, source-to-category traceability and agreement statistics.

### *A.1 Routine Family Definitions*

*A1- Coordination Routines:* Recurrent practices managing interdependence under growth through decision rights, sequencing, bottleneck resolution, authority structures and cross-unit integration. Treat A1 as the primary interpretive category when coordination is specified as a routinised practice with a clear mechanism-to-outcome linkage, rather than through generic references to centralisation or hierarchy.

*A2- Replication Routines:* Practices enabling the transfer and reproduction of an operating model across sites, units or ventures, including templates, playbooks, training, artefacts, standardisation, mobility-based transfer and governance of the fidelity-adaptation trade-off. Treat A2 as the primary interpretive category when multi-site rollout or template transfer is the focal scaling mechanism.

*A3- Control/Measurement Routines:* Recurrent practices that make execution legible and governable, including KPI or OKR cadences, unit-economics tracking, quality assurance, stage-gate governance and budgeting cycles. Treat A3 as the primary interpretive category when performance legibility, variance reduction or prevention of premature scaling is the focal mechanism.

*A4- Learning/Search Routines:* A4- Learning/Search Routines: Recurrent practices for generating, evaluating, retaining and redirecting knowledge, including trial-and-error learning, feedback loops, aspiration adjustment, exploration-exploitation balancing and reorientation or pivot routines. Treat A4 as the primary interpretive category when adaptive reorientation or capability renewal under uncertainty is the focal mechanism.

*A5- Boundary Routines:* Practices governing the organisation's interface with external actors and institutions, including alliance governance, ecosystem orchestration, contracting, regulatory engagement and compliance-by-design. Treat A5 as the primary interpretive category when alliance, ecosystem, regulatory or legitimacy-related performance is central to the scaling outcome.



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### *A.2 Overlap Rules for Interpretive Classification*

1. A source may be associated with more than one routine family. Where one family is most directly implicated in explaining the scaling-related outcome, it should be treated as the primary interpretive category.
2. Replication and measurement: if transfer is the focal mechanism, A2 should be treated as primary; if legibility, discipline or variance reduction is focal, A3 should be treated as primary.
3. Boundary and coordination: if the outcome concerns alliance, ecosystem, regulatory or approval performance, A5 should be treated as primary; if the outcome concerns internal execution reliability under external dependence, A1 should be treated as primary.
4. Control and learning: A3 and A4 may be interpreted jointly where control routines enable learning discipline or, alternatively, suppress exploration.

### *A.3-Guidance for Future Empirical Replication*

The routine-family scheme can be operationalised in future empirical research. Such studies should apply double-coding to a defined share of the corpus, report agreement statistics and provide source-to-code traceability.

Future replications may independently classify at least 20% of the corpus or a minimum of 30 records, whichever is larger. Agreement may then be assessed through Cohen's kappa for categorical assignments and weighted kappa or ICC for ordinal assessments, where applicable.

Discrepancies should be resolved by reference to the interpretive rules in A.2 and to excerpt-level evidence. Any refinement of the rules should be recorded in a transparent change log.



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# Conducting Ethnographic and Autoethnographic Research in Business and Management: Challenges and Opportunities

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**Sommario**

Il presente articolo esamina le sfide e le opportunità legate alla conduzione di ricerche etnografiche e autoetnografiche nel campo degli studi aziendali e gestionali. Sebbene questi approcci rimangano meno diffusi rispetto ad altri metodi, offrono possibilità distintive per analizzare la vita organizzativa dall'interno. L'articolo ripercorre lo sviluppo storico dell'etnografia e dell'autoetnografia, ne discute la diffusione nei diversi sottocampi degli studi aziendali e gestionali e riflette su questioni metodologiche ed etiche fondamentali. Attraverso due vignette basate su diari, una etnografica e una autoetnografica, il lavoro mostra come i diari possano fungere da strumenti analitici per collegare l'esperienza vissuta alle prospettive teoriche. In tal modo, l'articolo sostiene che l'etnografia e l'autoetnografia possono ampliare i confini metodologici e analitici della ricerca in ambito aziendale e gestionale, a condizione che le loro dimensioni relazionali, soggettive e narrative siano trattate con rigore metodologico, anziché costituire punti di debolezza.

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*Parole chiave*: etnografia, autoetnografia, diari, riflessività, metodi qualitativi, ricerca sul campo

*Condurre ricerche etnografiche e autoetnografiche negli studi di economia e management: sfide e opportunità*

**Abstract**

This paper discusses the challenges and opportunities of conducting ethnographic and autoethnographic research in business and management studies. While these approaches remain less common than other methods, they offer distinctive possibilities for analysing organisational life from within. The paper traces the historical development of ethnography and autoethnography, discusses their diffusion across different business and management subfields, and reflects on key methodological and ethical issues. Drawing on two diary-based vignettes, one ethnographic and one autoethnographic, the paper shows how diaries can act as analytical tools to connect lived experience to theoretical insights. In doing so, the paper argues that ethnography and autoethnography can expand the methodological and analytical boundaries of business and management research, provided that their relational, subjective, and narrative dimensions are treated as sources of rigour rather than as weaknesses.

*Keywords*: ethnography, autoethnography, diary vignettes, reflexivity, qualitative methods, fieldwork

## 1. Introduction

In a constantly changing and evolving world, it becomes even harder to grasp the complexities of organisational life. Ethnography and autoethnography are valuable, perhaps unevenly institutionalised across business and management studies, for addressing complex phenomena that would be challenging to examine through research methods that privilege distance and standardised measurement. Certain strands of business and management studies have become quite accustomed to resorting to ethnography (especially in organisation studies, consumer research, marketing and, partly, accounting), but ethnography is not always practised as a craft that requires methodological rigour and deep immersion. Bate (1997) and Watson (2010) stress this by inviting researchers to practice ethnography with the original spirit of deep immersion in the field and with a close involvement with the culture studied in its natural environment, rather than conducting hasty and limited "jet-plane ethnography'. Ethnographic and autoethnographic research is fundamentally (inter)relational (Hibbert *et al.*, 2010); hence, it entails shaping how things are experienced alongside those who are studied.



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This relational character of ethnographic research, as argued by Ybema *et al.* (2009), might lead to the creation of strong, long-lasting ties with the culture under study, in ways that other research approaches fail to achieve. Nevertheless, this matter of proximity to those studied is not without issues, as both approaches are often criticised for being too subjective or for storytelling that lacks scientific rigour (Delamont, 2007). While ethnographers immerse themselves in an unknown culture, autoethnographers analyse their personal experience to understand and make sense of cultural experience (Ellis *et al.*, 2011). Ethnographers, by nature, tend to be relativist, in the sense that they "break away from the positive assumption that scientific knowledge is a cumulative, unmediated, and complete representation of reality" (Van de Ven, 2007, p.47). This means that they should reflexively consider the implications of their presence in their field, becoming part of the intersubjectivity with the culture they study.

This paper discusses challenges and opportunities for doing ethnographic and autoethnographic research in business and management studies, as powerful methods for theorising organisational life from within, while taking into account the issues that have limited their diffusion, such as the abundant time demands for fieldwork, its perceived subjectivity and limited generalizability, characteristics that are even heightened with autoethnography, often perceived as too personal and self-indulgent. Ethnography and autoethnography can make an important contribution to business and management studies if treated as rigorous and reflexive modes of enquiry rather than as weak narrative practices. Specifically, they can expand the capacity of business and management research to discuss "how things work" (Watson, 2011), engaging with complex issues such as power relations, identity, emotion, and oppression. Ethnography and autoethnography are particularly relevant for governance-oriented research because they can illuminate not only formal structures, rules, and decision-making mechanisms, but also the more informal, emotional, embodied, and relational processes through which participation, accountability, leadership, and belonging are enacted in practice.

In light of this, the paper is both conceptual and methodological, presenting two diary-based vignettes to illustrate how ethnographic and autoethnographic material can support reflexive analysis and produce theoretical contributions. While both vignettes are centred on issues of inclusion/exclusion, the first looks at participatory governance practices in a member-owned football club, set up as a reactive response to the exclusionary governance of elite football, whereas the second shifts attention to the informal governance of belonging within an embodied organisational setting. The dance vignette shows how, even in the absence of formal decision-making structures, groups develop informal mechanisms that regulate access, legitimacy,



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visibility, and participation. From this perspective, governance is not limited to boards, ownership models, or formal rules, but also includes the everyday practices through which members make or break boundaries, enforce norms, and determine who can occupy a shared organisational space.

The paper is guided by the following research question: *how can diary-based ethnographic and autoethnographic vignettes illuminate the processes through which lived experience is interpreted, written, and transformed into theoretical insight in business and management research?* In doing so, the paper focuses on access, reflexivity, ethics, writing, and theorising as key methodological challenges that become visible through the two vignettes.

The paper makes two main contributions. First, it clarifies the relationship between ethnography and autoethnography in business and management studies by conceptualising them as approaches positioned along a continuum of reflexive involvement. Second, it develops diary-based vignettes as analytical devices through which methodological challenges, including getting access, reflexivity, ethics, writing and theorising can be made visible.

## 2. A brief History of Ethnography

Anthropologists began to conceive fieldwork as we currently understand it during the mid-nineteenth century, often joining explorers, missionaries, and other Western travellers to study the evolution of culture in tribal societies (Stocking, 1991). Van Maanen (1988) underlines that, however, the most popular method at that time was the "armchair" type of anthropological enquiry, in which researchers, in the comfort of their offices, relied on vast reading material from sources such as missionaries, traders, and scientific expeditions. Another form of communication for anthropologists was correspondence with pen pals, to whom they submitted sets of questions to ask the natives, which were then returned for analysis (Stocking, 1984).

A new conception of fieldwork was introduced by Franz Boas in the United States and Bronislaw Malinowski in Britain, as Van Maanen (1988) and Stocking (1984) argue. They were the first anthropologists to introduce and then pass down the practice of fieldwork as something to experience personally within the culture being studied, rather than relying on secondary sources. Malinowski (1922) suggested that the use of participant observation was a way to understand the native point of view, although, as Van Maanen (1988) notes, the release of Malinowski's diaries (1989) of his fieldwork among the natives of the Trobriand Islands in the South Pacific showed how prejudiced and ideologically biased he was.

Anthropology has not historically been the only discipline to contribute



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to the development and diffusion of fieldwork and ethnography as a method. Progressively, the more imperialist form of cultural studies has developed into more reflexive forms. The credit mainly goes to the Chicago School of Sociology, or, as Van Maanen (1988, p. 17) defines it, the Chicago School of Urban Ethnography. Cunliffe (2010, p. 228), paraphrasing Blumer (1954, 1969), states that members of the Chicago School explained their need to undertake fieldwork and interpret the "new natives" on the premise that "we act on the basis of the meaning of things, and that those meanings are created in social interactions". For the Chicago School, fieldwork was a crucial step in understanding the empirical world they studied. Students at the School, encouraged by people like Robert Park, John Dewey and Ernst Burgess, started exploring the streets of Chicago "as if they were remote and exotic settings" (Van Maanen, 1988, p. 18). Those students were not specifically trained in conducting fieldwork, as Park, for instance, gave them very little guidance. Despite the Chicago School's efforts to promote ethnography among sociologists, Van Maanen (1988) states that Park and his colleagues did not succeed in elevating ethnography to the same status it has in anthropology, leaving it a niche method.

Ethnography in management studies has a more recent tradition than anthropology and sociology. Czarniawska (2007) says that management research saw rapid development in the 1950s and 1960s but mostly aligned with quantitative methods that were also becoming prominent in sociology. However, classic sociological ethnographies like Whyte's *Street Corner Society* (1943) have had a profound influence on studies of work and management, as they highlighted how social order could be grasped by observing everyday interactions and informal arrangements. For instance, one of the early examples was Dalton's Men Who Manage (1959), which examined how managers actually behave beyond formal structures, teasing out the unwritten rules of survival and success in corporate life. Similarly, Roy (1959) used the term "Banana Time" to highlight how workers coped with their repetitive jobs by relying on workplace rituals, which fostered social cohesion and provided them with some degree of structure. Gouldner (1954) studied a gypsum factory to witness first-hand the applicability of Weber's theory of bureaucracy and discovered three distinct patterns of bureaucratic rules, based on the acceptance of the rules by workers and managers: *mock* bureaucracy, *representative* bureaucracy and *punishment-centred* bureaucracy. In different ways, these early works were seminal in demonstrating the ongoing production and reproduction of control, consent, resistance, and informal practices within the everyday life of workplaces.

Progressively, in the 1970s and 1980s, scholars became more interested in studying organisations as cultural and symbolic worlds and how culture



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creates meaning for organisational members (see, for instance, Pettigrew, 1979; Smircich, 1983). This cultural turn proved significant for ethnographers, as it enabled scholars to study the enactment, reproduction, and daily evolution of organisational culture, moving beyond managerial accounts to investigate it from the perspective of organisational members. During these years, Van Maanen (1975) wrote his seminal ethnographic work on the socialisation (and indoctrination) processes of U.S. police recruits, undergoing police training himself and patrolling to better grasp how recruits acted and thought. This work also later led him to theorise about ethnography in his masterpiece, *Tales of the Field: On Writing Ethnography* (1988), which became a go-to guide for all ethnographers in the world.

In the 1990s, ethnographers explored culture from different perspectives, heavily influenced by Labour Process Theory (LPT). Kunda (1995) took the perspective of managers and engineers to show how a strong corporate culture can act as a sophisticated form of normative control, influencing employees' emotions and thoughts. Collinson (2010) studied how blue-collar male workers in a truck manufacturing plant survive the hardships of factory life by constructing masculinity, and creating a counter-culture made of irony, humour and group solidarity against strong managerial control. Delbridge (1998), instead, spent time undercover working in two different manufacturing assembly lines that followed principles of Just-In-Time (JIT) and Total Quality Management (TQM). He showed that, while these manufacturing systems were presented in much of the management literature as empowering for workers, they were instead instruments of hyper-surveillance, which often resulted in self-disciplining/self-monitoring teams, and that workers still found ways to creatively resist and preserve some autonomy.

While Cunliffe (2010) argues that we still have too few business and management ethnographies, in the late 1990s and especially in the 2000s, ethnography has been increasingly acknowledged as a distinctive approach to studying complex environments, and the proliferation of methodological texts and edited collections has contributed to its success (e.g. Neyland, 2008; Ybema *et al.*, 2009; Hammersley and Atkinson, 2019). This emphasis on reflexivity is part of a broader interpretive shift in organisational research, in which conventional ideas about neutrality, detachment and transparent representation have been increasingly questioned (Cunliffe, 2003; Johnson and Duberley, 2003). Moreover, ethnography expanded into other subfields of business and management beyond organisational studies. Despite some scholarly resistance (as underlined by Jönsson and Macintosh, 1997), ethnography has been used to show that accounting must not be understood merely as a technical system, but rather that calculative practices are deeply embedded in organisational routines, power relations, and professional



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identities. Since Hopwood (2013) called for accounting to be studied in its organisational and social context, a few ethnographic studies in accounting and accountability have been published, including Dent's (1991) work on the implication for new accounting practices in organisational change towards the reconstruction of organisational culture, Kornberger *et al.*'s (2011) work on how professional identities, career progression and managerial subjectivity are produced inside a Big Four accounting firm, and Torchia *et al.*'s (2023) study on how an alternative, semi-professional football club in the UK strives to promote inclusive accounting and accountability practices while trying to adhere to its core values even in its darkest times.

Marketing and consumer research has become one of the richest subfields for ethnography, following seminal articles like Arnould and Wallendorf's (1994) methodological piece on how interpretive ethnography can support marketing strategies, and Schouten and McAlexander's (1995) work in consumer research that looks at Harley-Davidson bikers, labelling them as a consumption subculture and Kozinets (2002a) exploration of an antimarket event as a site for emancipatory dynamics. Kozinets is also credited with developing netnography in the 1990s to study online communities (e.g., Kozinets, 1998, 2002b, 2010).

Information systems and technology have also been a fertile ground for ethnographic enquiry in workplace studies. These works shifted the attention from formal organisational structures to how work is actually accomplished in situated activity. Suchman's (1987) study at Xerox on Human-Computer Interaction (HCI) challenges the assumption that human action is contingent, improvised, and often dependent on local circumstances, rather than the simple execution of plans. Barley (1986)'s study on CT scanners in radiology departments shows the impact of technology on roles, routines and structure and similarly demonstrates that technology does not always have uniform organisational effects. Barley's ethnography shows that the same technology may lead to different structuring processes, depending on occupational roles, interactions and local work patterns. Orr's (1996) work further develops this perspective by showing that photocopier repair technicians' diagnoses are not merely the application of formal "by the book" repair procedures, but a situated practice that combines practical reasoning, technical knowledge, customer accounts, and storytelling. From a methodological perspective, Barley's (1986) study is also very significant because it does not rely solely on ethnographic data but also includes more formal comparative and quantitative elements, such as regression analyses. This hybridity suggests that, at least in some strands of organisational and management research, achieving legitimacy requires ethnography to be paired with methodologies more recognisable to mainstream audiences. The article shows both the promise and



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the challenges of ethnography in achieving legitimacy in business and management studies: while ethnographic observations were seminal for understanding how technology becomes embedded in everyday work practices, the study also reflected a field in which "pure" ethnography was not yet easily accepted as sufficient evidence.

## 3. The Emergence of Autoethnography

Autoethnography is not detached from the broader ethnographic tradition; it emerges from it, further questioning the role the researcher plays in the production of knowledge. As Hayano (1979, p. 99) suggests, to some extent, "the problems of auto-ethnography are the problems of ethnography compounded by the researcher's involvement and intimacy with his subjects". This work is often cited as a reference point, as it defines autoethnography as the study of the social world in which the researcher lived, emphasising not yet so much the evocative side of personal experience and personal writing, but rather the insider position of the researcher within the culture studied. With the reflexive and postmodern turn in the social sciences, autoethnography changed profoundly, and greater scrutiny was placed on how the researcher's presence, positioning, and narrative choices shaped the field's accounts. In this context, autoethnography emerged, making the researcher's experience much more visible and felt. Its methodological consolidation is associated with the work of Carolyn Ellis and Artur Bochner at first, and later with Tony Adams, Stacy Holman Jones, and others. Ellis and Bochner's influential work, which stresses personal narrative, reflexivity, and the researcher-as-subject, defined autoethnography as both a method and a form of writing. Later, Ellis's seminal work, *The Ethnographic I* (2004), further helped establish autoethnography as a genre in which lived experience, narrative craft, and cultural analysis are deeply interconnected. Ellis *et al.* (2011) describe autoethnography as both an approach to research and writing that uses personal experience to analyse and understand culture, stressing that it is a method, a process and a product at the same time. Autoethnography becomes a mode of enquiry that binds the "auto" and the "ethno" together, allowing the researcher's experience to shed light on wider social, cultural, political, and organisational dynamics and to channel cultural analysis through the researcher's lived experience.

One of the main debates in autoethnography was the balance between evocation and analysis, with evocative autoethnography challenging more conventional academic writing through its emphasis on storytelling, emotions, and the ability to affect readers through appealing narrative (Bochner and



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Ellis, 2016). However, this orientation fuelled criticism and led to the development of new approaches to address excessive subjectivity and a lack of analysis. On one side, Ellis *et al.* (2011) stress the need for new forms of inquiry stemming from the "crisis of confidence" that social sciences had since the 1980s with established ontological and epistemological stances, claiming that autoethnography "accommodates subjectivity, emotionality, and the researcher's influence on research, rather than hiding from these matters or assuming they don't exist" (Ellis et al, 2011, p. 274). On the other hand, Anderson's argument for analytic autoethnography (2006) entails seeking a broader understanding of the phenomenon studied and a theoretical contribution, stressing that personal experience should be connected to theory building, thereby bringing autoethnography much closer to classic ethnography in sociology. Anderson's conceptualisation of analytic autoethnography is highly relevant to business and management studies, where narrative richness and thick descriptions (Geertz, 1973) need to be balanced with a strong conceptual and theoretical contribution.

Historically, in business and management studies, autoethnography has had a more marginal role than ethnography, but it has increased in relevance and influence, especially in organisation studies, critical management studies, and international management, where issues of identity, emotion, embodiment, reflexivity, and professional experience are prominent. In this regard, Humphreys (2005) article on reflexivity and autoethnographic vignettes is relevant because it emphasises the role of personal narratives as an analytically enriching tool for qualitative management research. Similarly, Learmonth and Humphreys' work on academic identity (2012) shows how autoethnographic accounts can help study identity in professional contexts like business schools and higher education institutions. Karra and Phillips's (2008) article on "researching back home" uses autoethnography to tease out the tensions of conducting international management research in one's own cultural setting, showing how autoethnography can cast light on the unstable boundaries between being an insider and an outsider in cross-cultural research. Their research helps analyse the implications of the researcher's presence in the field, as someone deeply embedded in a network of cultural, linguistic, and institutional relations rather than a neutral observer. Marengo *et al.*'s (2026) recent work on the New European Bauhaus sheds light on dialogic accounting accountability practices that promote social and environmental sustainability in an EU-funded, collectively managed community gardening project, through a "collaborative autoethnography" (Chang *et al.*, 2016). To sum up, despite being less widely used, autoethnography is equally important for business and management studies because many organisational phenomena are lived and processed internally before being articulated



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externally. Hence, autoethnography provides methodological tools to analyse such experiences in ways that move them from being anecdotal to analytically meaningful. At the same time, autoethnography can be even more methodologically demanding than ethnography to justify its legitimacy. This depends heavily on how well the researcher can connect experience to analysis, moving away from simply presenting personal narrative to actively contributing to existing debates. Moreover, it requires an even greater attention to "relational ethics" (Ellis *et al.* 2011, p. 281), as autoethnographers write about others just as much as they write about (often intimate) others, requiring particular care in the ethical issues of their study, as "they also have to be able to continue to live in the world of relationships in which their research is embedded after the research is completed" (*ibid.*, p. 282).

## 4. Methodological Considerations on the Relationship between Ethnography and Autoethnography

Both ethnography and autoethnography share a deep commitment to context, experience, reflexivity, and writing as part of the research craft. In a socially constructed world (Berger & Luckmann, 2016), both approaches challenge the idea that researchers can be fully detached from the social worlds they study. Deep engagement in the field can produce thick accounts of organisational life, capturing phenomena that may remain inaccessible to methods that rely primarily on distance, abstraction, or retrospective analysis. Yet the distinction between ethnography and autoethnography should not be framed too rigidly. Although autoethnography places the researcher's self more explicitly at the centre of the analysis, ethnography is not entirely external to the researcher either. In both cases, fieldwork is conducted through embodied presence, relationships, emotions, memories, and interpretive positioning.

Recent work on reflexive and embodied ethnography is particularly useful for rethinking this boundary. Field-Springer's (2019) notion of reflexive embodied ethnography entails that the ethnographer is not a detached observer but an embodied co-participant whose presence, emotions, empathy and writing shape the production of knowledge. Similarly, Rosales and Babri (2023) argue that emotions in organisational ethnography should not be treated simply as biases or contaminations, but as resources for embodied reflexivity. These contributions suggest that ethnography already includes several dimensions often associated with autoethnography: bodily involvement, emotional display, relational positioning, and reflexive interpretation. Autoethnography intensifies these dimensions by making the researcher's lived experience in the field more visible and analytically central.



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The two approaches are therefore better understood as positioned along a continuum of reflexive involvement rather than as mutually exclusive. If ethnography examines how organisational practices can be interpreted and understood from within, autoethnography asks how the researcher's experience of inhabiting and living those practices can shed light on wider organisational and cultural dynamics. However, the "auto" does not replace the "ethno": personal experience becomes analytically meaningful only if connected to broader social, cultural, and organisational processes. Likewise, ethnographic fieldwork often includes autoethnographic elements; for instance, as in Field-Springer's case (2019), researchers might keep reflexive diaries about getting access, discomfort felt during fieldwork, ethical tensions, bodily reactions, or their changing position in the field.

This porous boundary becomes especially visible in relation to issues of access. Ethnographic studies often require a degree of access that is far from unproblematic or easy to obtain. Entering the field can be a difficult process, especially when the researcher seeks prolonged immersion and close observation of everyday practices. Although the idea of "studying the natives", inherited from early anthropology, may appear remote or outdated in contemporary research, the wider issue remains relevant: ethnographers must still negotiate entry into cultures and social worlds that are not readily open to them. Bryman and Bell (2011) identify access as one of the key difficulties of ethnographic research, while Hammersley and Atkinson (2019) emphasise the role of gatekeepers, trust, and ongoing negotiation. Organisational access is produced relationally through negotiation, relational work, and trust, and researchers may still face limitations in the situations they encounter. The presence of the researcher during overt fieldwork needs to be accepted, or at least tolerated, by the culture. This proximity might help the researcher ask difficult questions, but it might also help them avoid them to preserve the relationships that were created. However, autoethnography transforms the problem of access, rather than removing it altogether. Autoethnographers may not need to negotiate formal entry into an organisation as ethnographers do when entering companies, meetings, archives, or professional communities. Yet, belonging to the field does not provide unrestricted access to meaning, memory, vulnerability, relational permission, or the ethical right to discuss experiences involving others. The researcher may have privileged access to his/her own lived experience, but not necessarily to the intentions, interpretations, or emotional worlds of other participants. Insider status may also be a double-edged sword, making familiar arrangements and norms appear pretty ordinary and not analytically significant. Autoethnographic access is therefore displaced from the question of how to enter the field to the question of how to interpret, write, and ethically account for a field one already lives in.



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Reflexivity is central to this reframing. For Hammersley and Atkinson (2019), reflexivity means that researchers are part of the social worlds they study, regardless of their epistemological or ontological stance. Findings are shaped not only by participants and phenomena, but also by the researcher's presence, position, interactions, and interpretive choices. This does not undermine ethnographic knowledge; rather, it clarifies the conditions under which such knowledge is produced. Reflexivity challenges the idea that researchers can report an external reality without being actively implicated in the research process. At the same time, reflexivity should not become so self-absorbed as to prevent meaningful analysis. A diary entry about anxiety, embarrassment, or discomfort becomes analytically valuable when it moves from self-description to conceptual insight, for instance, into professional identity, power, legitimacy, organisational culture, or embodied norms.

Embodiment further complicates the relationship between ethnography and autoethnography. Chadwick's (2017) work on embodied methodologies warns against treating the body purely as an object to be described in language. Embodiment also appears through silences, hesitations, contradictions, affective intensities, bodily discomfort, and modes of representation. Lyle *et al.*'s (2024) discussion of embodied reflexivity similarly suggests that the body can function not only as something to be studied but also as a (powerful) way of knowing. This is especially relevant for organisational research, where power, belonging, discipline, exclusion, and identity are often experienced before being explicitly articulated. From this perspective, the researcher's bodily and emotional responses can serve as methodological resources through which organisational dynamics become visible.

Academic writing is another relevant issue for both ethnography and autoethnography. Conventional business and management literature values clarity, theoretical positioning and explicit contributions. This might be less standardised in ethnographic and autoethnographic writing, especially in confessional ethnographic tales (Van Maanen, 1988) or evocative autoethnography (Ellis, 2004; Ellis *et al.*, 2011). However, writing is a key part of the method, not just a stylistic matter. Through writing, the researcher can convey the lived experience and connect it to theory. The main issue is striking a balance between evocative/confessional and analytic writing, so that the text conveys both the lived experience and supports conceptual arguments. Hence, a diary vignette must be properly introduced, contextualised, and analytically interpreted; otherwise, it risks becoming little more than decoration.

Ethics is also very challenging. As Ferdinand *et al.* (2007) argue, research should be conducted on the basis of informed consent (to the extent possible) to protect both the research and the participants from real or potential harm.



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However, they contend that two contrasting positions on ethics exist: on one side, the "traditionalists" believe that ethics in research should be much regulated and that, while doing management research, one should follow the principle of reciprocity, namely a "mutually beneficial exchange involving participative or collaborative working arrangements based on mutual trust" (*ibid*., p. 520); on the other side, the "radicalists" instead argue that ethics is a reflexive process that abstracts from codes and guidelines, and the researcher evaluates such issues depending on the situations faced. We argue that researchers should try to protect anonymity or alter identifying details when possible and seek consent when specific organisations or individuals are represented in recognisable ways. In ethnography, but especially in autoethnography, ethical reflexivity entails a deep responsibility towards others and oneself.

Taken together, these reflections suggest that ethnography and autoethnography should not be treated as distinctively separated approaches. The distinction is therefore best understood as a matter of reflexive intensity rather than strong methodological opposition. While ethnography focuses on the social world encountered through fieldwork, autoethnography focuses on the researcher's involvement in that world. Both approaches rely on transforming situated, embodied and relational experience into theoretical insight. In the next section, we present and discuss two vignettes to illustrate how diary-based materials can be framed, presented and analytically interpreted to advance research in business and management.

## 5. Ethnographic and Autoethnographic Diary Vignettes

The following vignettes are based on ethnographic and autoethnographic research conducted directly by two of the authors and are centred on the theme of organisational belonging and inclusion in two very different settings.

The ethnographic vignette revolves around FC United of Manchester, a fully member-owned semi-professional football club in Manchester (UK), founded in 2005 by disillusioned Manchester United fans seeking to run football more democratically. It recalls one of the early days of getting to know the culture as an outsider, and of starting to understand fans' perceptions that Premier League football has progressively driven away a wide range of traditional fans due to high match prices. The encounter takes place on a Saturday afternoon before an FC United match at Bury's stadium, Gigg Lane, which the club rented for ten years before moving to their own stadium in Moston. This diary entry was reconstructed from memory shortly after the encounter.



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*I arrive at the ground reasonably early; it's my first journey on the 135 bus from Manchester City centre to Bury. There are quite a few FC United fans on the bus talking to each other. I observe them and soak up all the experience in. Once we get to Bury, I notice that the streets around the stadium are a bit quiet, not empty, but different from the sensory overload of Serie A and Premier League football I was used to: not that many police officers, fewer barriers and fewer branded surfaces trying to direct bodies and attention. Yet, the atmosphere is very lively: people buying beer, a father and his son arguing whether they have time to get some chips from the stall before entering and so on. Nobody seems rushed; they are all pretty chill. I pay at the gate, and near the turnstiles, I begin speaking to this man in his late fifties, wearing a faded red and white scarf. After a brief chat, he notices my accent.*

*"Weird accent, man, it sounds northern (British) but also foreign at the same time!"*

*"Ahah, I'm Italian indeed, but I've been living in the UK for a few years, must have picked up the accent a little bit. I'm a young academic, I just started researching FC United".*

*He laughs softly. "Research? On this lot?"*

*I explained to him that I am interested in supporter ownership, alternative governance models and that FC United really caught my attention, as a fellow football fan. He nods, but his attention shifts briefly towards the stadium entrance where people are slowly gathering.*

*"You know what really pushed me out? It wasn't even the football. I just felt that the game stopped being for folks like me".*

*While we walk towards the stands, he tells me that he used to go watch Manchester United with his brother and later with his son. His description of the transformation unfolds almost chronologically: ticket prices rising, membership becoming harder to obtain and afford, hospitality expanding, and tourists replacing the familiar faces he has met for years.*

*"At some point", he says, "you looked around and realised that pretty much nobody around you was from Manchester anymore… You save money for weeks just to take your kid to Old Trafford, then you sit there and get told that football was becoming "global'. But global for whom?"*

*I ask him whether the issue was only economic.*

*"No!" he replies immediately. "It wasn't just the money. In a way, it was what that money meant for us".*

*He points towards the stands in front of us.*

*"Here at FC, you still feel like you are part of something. Not only because we are co-owners, but also because we are emotionally and morally connected.*



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*You come here, and you don't find people that are trying to extract every last fuc**ng penny from you".*

*The queue begins moving quicker, and before we separate, he looks at me once more and says:*

*"You know what? The football is worse; the ground is worse, and it's not even ours! It's all smaller, but it's more human, and it's fuc**ng ours!*

*As I write my notes later that day, one sentence remains underlined in my diary:*

*"It wasn't just the money. It was what the money meant".*

This episode shows how ethnography can reveal the moral and emotional dimension of economic practices. Ticket pricing initially appears to be a commercial issue, yet in the interaction above, it becomes a symbolic example of exclusion, belonging, and recognition. The supporter does not view Premier League ticket prices merely as financial barriers; he stresses a deeper transformation in the relationship between football clubs and supporters, shifting it from an economic to a moral issue. The vignette also demonstrates the value of situated interaction, as the supporter's reflections are inseparable from the physical and social environment in which they are articulated, the stadium. Moreover, it displays the production of relational knowledge. The conversation unfolds through the initial recognition of difference, movement through the stadium's physical space, and mutual positioning. Here, the researcher's identity as an Italian young academic actively shapes the encounter itself, highlighting how ethnographic data are not passively collected but are co-produced through the development of networks of social relations. Finally, it illustrates how fieldnotes can become analytical tools. The sentence "It wasn't just the money. It was what the money meant" raises a broader theoretical issue: the commodification of football, the sense of exclusion, and the moral ownership in contemporary football governance. The supporter does not simply provide an opinion on pricing strategies but rather offers a narrative of dispossession and the search for more human approaches to organisational participation.

This vignette offers several methodological insights into the author's ethnographic journey. The episode takes place before the author officially joined the club as a volunteer, and it positions him as an outsider beginning to find his feet in the field. What he knew about the club came from things he read about it over time, but there he took the chance to conduct his first field trip and immerse himself in the culture. In this case, he decides to immediately declare his identity as a researcher and his intentions to the FC



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United fan, who appears welcoming and willing to chat. FC United is a club whose ethos is rooted in appreciating diversity, and here the author used his accent and different nationality to lead the fan to a brief discussion about losing roots and finding them again at FC United in a different form. The vignette also briefly brings together ethnographic and autoethnographic elements, as the researcher reflects on the episode and looks inward to learn more about himself and others, as Rosen (1991) would argue. The "it wasn't just the money" sentence underscores the encounter's significance and the space for reflection and imagination it creates in the researcher.

The vignette shows that access in ethnographic research is not simply granted through formal entry into an organisation. It is progressively negotiated through relational encounters in which trust, curiosity, identity, and openness matter. In this case, the identity disclosure is significant because it shows how ethnographic access may be facilitated not only by institutional permission, but also by the moral and cultural ethos of the field itself. FC United's identity as a supporter-owned club rooted in participation, inclusion, and resistance to the exclusionary governance of elite football created conditions in which an external researcher could be welcomed into conversation rather than treated with suspicion. The researcher's outsider position also becomes methodologically relevant. His accent, nationality, and unfamiliarity with the local supporter culture do not simply mark distance from the field; they become precious resources through which the conversation unfolds. Difference allows the supporter to articulate what FC United means in relation to loss, belonging, roots, and re-identification. The brief exchange, therefore, reveals something that formal descriptions of member ownership cannot fully capture: the club is not only a governance structure but also acts as a symbolic and emotional space in which supporters negotiate the experience of losing and recovering a sense of footballing home.

The sentence "it wasn't just the money" becomes the analytical centre of the vignette. It captures the supporter's attempt to distinguish FC United's emergence from a purely economic protest against ticket prices or commercialisation. For the researcher, the sentence opens a space for reflection and imagination: it invites him to consider member ownership not simply as an institutional arrangement, but as a moral and affective response to exclusion, displacement, and the perceived loss of roots in elite football. In this sense, the vignette displays how ethnographic insight can emerge from brief, situated encounters that can unsettle the researcher's prior assumptions and generate new analytical questions.

Finally, the episode also questions the boundary between ethnography and autoethnography. Although the vignette is primarily ethnographic, as it centres on an encounter in the field, it also contains an autoethnographic



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element. The researcher's interpretation depends on his own affective response, his recognition of himself as an outsider, and his inward reflection on what the encounter reveals about belonging, identity, and attachment. In this sense, the vignette shows that ethnographic fieldwork is never purely external: encounters with others also can reshape the researcher's understanding of himself, the field, and the theoretical significance of what is being observed.

The autoethnographic vignette takes place at a dance school in the north of Italy that one of the authors has attended for the past few years. The vignette is set in an adult-amateur modern dance course open to participants of all ages and skill levels. Starting as a small course with only a few participants, it gradually expanded into a class of about fifteen adults, whose members differed significantly in age and technical level. While some of them have a long track record in dance, others have only been practising this discipline for a couple of years. Despite the teacher's strong inclusive ethos and commitment to fostering a non-discriminatory atmosphere and informal governance in her school (at least for the adult course), as the course grows, differences among participants become more pronounced, leading to tensions emerging within the group. One of these stems from the frustration that more advanced dancers feel towards less experienced participants. As lessons progress and the recital rehearsals heighten emotional pressure, advanced dancers become increasingly uneasy about sharing the studio and performing alongside them. As a participant-observer, the researcher gains access to harsh truths that surface in conversations outside the ballroom. The following excerpt from the field diary captures a conversation between two advanced dancers (whom we will refer to as Victoria and Lucrezia) and the researcher, which takes place at the end of a lesson:

> *Victoria says she would rather have fewer classes per week, as long as they are not together with "them". Lucrezia and I agree that the course's management is still proceeding through trial and error, as this is only the second year with such a large number of participants. Of course, proposals can be made, but the final decision rests with Isabella* (the teacher)*. It is her school, and everyone is aware of Isabella's vision of what a dance school should be: a space grounded in inclusivity. Victoria laughs and says, "Just because the teacher works with disabled people doesn't mean we need to have disabled people in our class too!" I try to make her understand the value of the effort people put in. When someone is trying their best, what is the problem? The course is open to different skill levels, and if a person is genuinely committed, why shouldn't they be allowed to participate in the more advanced lessons and in the final performance? And, ultimately, how does their participation affect her personally? Victoria is blunt about it: "Passion is not enough; if the final*



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*result looks awful, then who cares about passion?" What bothers her the most is that "some people" lack awareness of their own bodies and sometimes crash into her. She also says that she doesn't want class time to be slowed down by corrections directed at them: there is little point in correcting them when, in her view, they are already a complete disaster. I point out that they, too, value being corrected and have the right to receive corrections to improve. She dismisses my argument and pushes the point further, adding that she is tired of compromises over costumes meant to conceal what she calls "fat bodies" of some participants. On this point, Lucrezia agrees with Victoria but in a more resigned tone: if those women themselves do not perceive it as a problem, she argues, why should the rest of us? I venture to say that they do, in fact, experience it as a source of discomfort. Victoria replies that Anna clearly does not see her weight as a significant enough problem in her everyday life. She may feel uncomfortable about the costume, she says, but then she goes home and still eats a cream puff. I explain that I genuinely feel sorry that Anna does not feel comfortable, and that my intention is to make a collective proposal to change the costumes. It is true that Anna lives with those extra kilos every day, but the mirror in the dance studio is like a moment of truth, a confrontation with oneself, and for none of us is it pleasant to stand exposed before our own insecurities. Victoria and Lucrezia tell me that I am too sensitive and too easily moved by others' struggles. Dance, they argue, is not for everyone, and if Anna truly felt uncomfortable, she would simply stop attending. I remain in silence.*

This episode illustrates how the organisational space of the class is permeated by informal hierarchies and embodied norms regulating who has the right to belong in the dance space and under what conditions, thereby shaping processes of inclusion and exclusion. Advanced dancers frame lower-skilled participants as "taking space", "slowing down the class", and lacking awareness of their bodies and spatial positioning. What initially appears to be a discussion of technical skills soon shifts to judgments about bodies, appearance, and legitimacy within the class. Because leading dancers perceive the studio as a limited resource – in terms of visibility in the mirror, physical space for movement, and access to the teacher's time and attention for corrections – they enact marginalisation strategies that reproduce exclusionary practices grounded in aesthetic standards of classical ballet. "Fat bodies" become easy targets for exclusion, and their removal is perceived as necessary to restore the previous status quo. The end-of-year recital intensifies these dynamics. As the recital is the moment of public display, dominant dancers feel heightened social performance anxiety. Weaker dancers are constructed as a reputational threat to both the dominant group and the class's collective image, thereby legitimising exclusionary practices by invoking concerns about collective performance and public representation. In this context, costumes function as tools that make bodies visible and subject to judgment.



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The suffering experienced by marginalised dancers is treated as evidence that they do not belong in that environment. Empathy is dismissed precisely because discomfort is the mechanism of selection through which informal leaders attempt to push marginalised bodies towards self-exclusion from the class. The researcher is neither among the executioners nor the victims. Still, she is subjected to pressure to conform: if she defends the marginalised, she risks exclusion from the dominant group; if she joins the leaders, she betrays her ethics. Her silence demonstrates the coercive power of informal leaders and the social pressure at play.

This vignette offers methodological insights into the specific challenges of autoethnographic research. Unlike the previous vignette, in which the researcher enters a field as an outsider and progressively negotiates access, the dance school vignette is set in a field in which the researcher was already fully embedded as a participant. Access, therefore, does not appear to be an issue of formal entry into an organisation, but rather a more complex issue of proximity, belonging, relational responsibility, and the ethical right to narrate shared experiences. The researcher is part of the social world she seeks to analyse and is herself exposed to its norms, pressures, and mechanisms of inclusion and exclusion.

Methodologically, the vignette shows that autoethnographic access is never simply given. The researcher's participation in the class grants her access to informal conversations, embodied routines, judgments, and affective dynamics that would likely remain unavailable to an external observer who is not so embedded in the field. At the same time, this proximity creates several ethical and analytical difficulties. The exclusionary talks that she witnesses are not from the perspective of a detached observer, but as someone who needs to decide if and how to respond in the moment, whether to defend those being targeted, whether to remain silent, and how to manage the risk of becoming marginalised herself. Her silence, discomfort, and hesitation, therefore, become part of the data, not because they provide a private confession, but because they reveal the social pressures through which conformity is produced.

The vignette also illustrates the paradox of disclosure in autoethnographic research and raises specific ethical issues, as the researcher's role was deliberately withheld from fellow participants. This decision was discussed with the school's teacher/owner, who served as the organisational gatekeeper and consented to the use of notes and diaries for research purposes. Specifically, disclosure to other dancers was not undertaken because it would likely have irremediably altered the interactional dynamics of the class, inhibited spontaneous conversations, and even potentially exposed the researcher herself to exclusion from the very social setting under study. However, we



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acknowledge that this form of non-disclosure is highly ethically sensitive and maintains the researcher's responsibility towards those represented in the account. For this reason, the vignette has been heavily anonymised: all names are pseudonyms, the school is not identified, detailed geographical information has not been provided, and the dialogue is presented as a reconstructed diary account rather than a verbatim transcript. The emphasis falls on the social mechanism through which belonging and informal management, governance and leadership are regulated, rather than on the personal characteristics or moral judgment of individual dancers.

Finally, the vignette complicates the boundary between ethnography and autoethnography. It is autoethnographic because the researcher's own experience is central to the analysis. Yet it is also ethnographic because this personal experience is used to interpret a broader social world: the informal hierarchies, embodied norms, and exclusionary practices through which the dance class regulates belonging. The self, hence, becomes the route through which the organisational dynamics of the field become visible. In this sense, the vignette shows how autoethnography can transform lived discomfort into methodological and theoretical insight.

## 6. Discussion

This paper argues that ethnography and autoethnography offer valuable opportunities for business and management studies, but only if their methodological challenges are properly addressed. Both approaches are strongly related: ethnography focuses on organisational practices, interactions and social worlds. Autoethnography, in contrast, emphasises the researcher's own experience to understand organisational and cultural dynamics. Considering them together enables business and management scholars to develop a more nuanced and reflexive understanding of the relationship between the field, the self and theory. It has long been debated that diary vignettes are often used as confessional, impressionist (Van Maanen, 1988), or, in the case of autoethnography, evocative tales (Ellis, 2004) to make findings more vivid. This paper aims to show that they can do more, such as revealing practices, making reflexivity visible, and connecting experience to theory. To do this, however, it requires careful design, as vignettes must be properly contextualised, ethically framed, managed, and analytically interpreted. The vignette suggests that the methodological challenges associated with both ethnography and autoethnography of access, ethical awareness, embodiment, emotional exposure, and writing difficulties should not become obstacles to grasping organisational life but are, in fact, necessary conditions for



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analytical reasoning. For instance, in the FC United vignette, the researcher's outsider position, accent, and early-stage access do not constitute limitations in the fieldwork but actually help shape the encounter and likely allow the supporter to define FC United as a space of recovered belonging. In the dance school vignette, what is on display is not only the researcher's personal reactions but also the unfolding of the informal pressures that help discipline belonging, exclusion, and dissent.

The analysis also suggests that the relationship between ethnography and autoethnography does not lead to a fixed methodological distinction. The FC United vignette, while primarily ethnographic, becomes partly autoethnographic when self-reflection becomes necessary to interpret the encounter with the fan. On the other hand, the dance school vignette is mostly autoethnographic, but it also contains ethnographic elements, as the researcher's experience is used to analyse a broader social world of hierarchy, informal leadership, ingroups, and outgroups. The distinction between the two approaches lies mostly in how the researcher's involvement in the field becomes analytically relevant.

The broader implications lie in the need for business and management studies for methodological pluralism capable of engaging with the complexities of organisational life (Watson, 2011). Ethnography and autoethnography are not meant to replace other methods, but to complement them by making visible aspects of organisational life that are difficult to capture otherwise. In particular, these approaches are very valuable for studying phenomena where lived experience really matters, such as identity, leadership, academic work, professionalisation, ethics, accounting and accountability mechanisms, and organisational change. Such phenomena often arise in fleeting interactions, embodied reactions, jokes, irony, tensions, and moments of discomfort. Ethnography and autoethnography are valuable not only for the thick descriptions they produce, but also because they allow researchers to closely experience these moments and analyse how organisational realities are lived. Moreover, they remind us that management knowledge is situated, relational (and written).

At the same time, this paper invites us not to overly romanticise these methods. Ethnography and autoethnography require considerable time, care, ethical sensitivity and a lot of writing discipline. They are long and immersive (Van Maanen, 1988; Watson, 2011), and there are no shortcuts to good ethnographic and autoethnographic work. They also require researchers not only to expose culture and organisational world, but also aspects of themselves and their own interpretive work. This can be both uncomfortable for researchers and a sign that the research they are conducting closely relates to the world(s) we live in.



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Finally, all the issues mentioned above can clash with the growing "publish or perish" culture, which is critically affecting academia, especially young scholars (Roth, 2005; Piercy, 2023; Wu, 2025), limiting their impact and diffusion. Luckily, several high-profile journals across different subfields of business and management are increasingly recognising the value of ethnographic and autoethnographic research, making it easier to break out of its niche.

## 7. Conclusion

Business and management studies require methods that can engage with complexity, ambiguity and lived experience and ethnography and autoethnography provide such opportunities. The historical development of ethnography and autoethnography has made them increasingly rigorous methods for business and management research, analysing how organisational life is reflexively experienced through the self. In this sense, the two diary-based vignettes presented above open windows onto organisational practices of inclusion and exclusion and how researchers' identity can be experienced through doubt and discomfort. Taken together, the two vignettes show the potential of diaries to connect lived experience and theoretical insights.

If conducted carefully, ethnographic and autoethnographic research can deepen our understanding of organisational life and considerably expand the methodological imagination of business and management scholarship.

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