Master

How relevant is Kotter’s change theory on organizational change in meta-organizations

A case study of the ESNreview of the Erasmus Student Network

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Acknowledgements

This paper marks the end of two educational, exciting and challenging years of Political Science and Management studies at the University of Agder. Over time I have come to realise that change and change management have been an unintentional red thread throughout my studies, and it was interesting to match this interest with the case of an organization which has brought me many trials and much joy during my time as a student. Through the work on this thesis I have been able to dive deeper into a complex myriad of theories and have earned a much better understanding of the wide and wondrous fields that are change and organizational management. For this I would like to thank my mentor, Dag Ingvar Jacobsen, whose knowledgeable input, patience, and repeated deadlines have been crucial for the completion of this thesis. I would also like to thank my family, for their support and patience in a long-winded process of writing this thesis.

Last but not least, a special thanks to the informants and to the volunteers of the Erasmus Student Network, for their passion and willingness to partake in this study.

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Acronyms

AGM	Annual General Meeting, the highest decision-making body of ESN
CND	Council of National Delegates
CNR	Council of National Representatives
ESN	Erasmus Student Network
ESNreview	The change process of the Erasmus Student Network, also referred to as the Review
IB	International Board of the Erasmus Student Network
LB	Local Board
LTV	Long Term Vision
NB	National Board
NBM	National Board Meeting
ND	National Delegate
NEP	Northern European Platform
NP	National Platform
NR	National Representatives of ESN
Review	Short for the ESNreview
SOS	Statutes and Standing Orders – the legal documents of ESN
STF	Structural Task Force

Abstract

Kotter's 8-step organizational change model is amongst the most popular change models in the world, however despite its continued success as a popular science approach to the topic of organizational change, it has received limited attention from the scientific community, and little research has been done into how the model works in practice. This thesis is a case study into the use of Kotter's change model, researching how well it may fit into a meta-organization. According to Ahrne and Brunsson, a lot of organizations may be described as meta-organizations, yet the research into this unique structure and its effects on existing organizational theories is limited. This thesis is a case study of the Erasmus Student Network, a meta-organization, and how well Kotter's model may be used to describe ESNreview, a larger structural change process the organization underwent from 2016-2019. The research has been done using most-similar case analysis and data triangulation of interviews, observations and literature analysis. The findings of this thesis is that while many of the aspects of Kotter's model are relevant in its most basic form, the way in which Kotter suggests that they be fulfilled are not, as the top-down format of Kotter's analysis clashes with the member-oriented power dynamic within meta-organizations.
Finally, the thesis calls for more research to be done in the field of planned change processes in meta-organizations to broaden and provide more generalizable results.

Keywords: Meta-organization, organizational change, Kotter, ESNreview, planned change, case study.

1 Introduction

1.1 Background

In April of 2019, in the ball room of a fancy hotel just off the city center of Thessaloniki, Greece, over 800 volunteers of the Erasmus Student Network were holding their breaths as the votes were tallied up. Then, as the pink "Yes" bar climbed across the projector screen, the room erupted in applause. 800 members rose from sore-backed from the seats where they had spent the last four days. The International Board were already on stage, hugging each other and receiving congratulations from the ones that had been brave enough to enter the small stage. With 79% of the votes (2019a), the ESNreview – a proposal for a full restructuring of the organization – had finally passed, followed by a new logo and visual corporate identity few minutes later (E. AISBL, 2017). On beds and couches across Europe fellow members watched the online stream, and within minutes, the organization's various social media platforms erupted. Certainly, this was a day of celebration for the organization.

Yet, while the passing of the ESNreview certainly marks a new chapter for the Erasmus Student Network, it also raises a few questions. A mere year earlier, then in a gymnastics hall in Costa Brava, Spain, the ESNreview-proposal had been raised to vote. The vision was mostly the same, as was the strategy, yet at the time, in 2018, the proposal failed, and the vote for the new logo was cancelled last minute due to the negative backlash from the crowd (E. AISBL, 2018). Why did the changemakers, the International Board, dare to run with the same proposal another year? What happened within those 12 months that made the organization turn? And, more importantly, why did it work?

1.2 Problematization

As an organization with primarily other organizations as its members, the Erasmus Student Network falls within Ahrne & Brunsson's definition of a meta-organization (2005). It is claimed that as many as 9% of contemporary multinational organizations may fall within the definition of a meta-organization, along with both national and local organizations (Ahrne & Brunsson, 2008). Yet, while change undoubtedly do take place within those organizations as well, these processes are yet primarily undocumented in scientific literature (Brunsson & Bor, 2019), and while there exists a massive number of different books, articles and studies on organizational change in general, most of these theories are based on a limited number of different organizational structures. As a fairly newly defined structure, few theories have been reviewed in the light of meta-organizations however, prompting several researchers within the field to call for more empirical research to increase the understanding in this budding field, and to foster understanding for how meta-organizations may differ from traditional organizational structures (Brunsson & Bor, 2019; Spillman, 2018).

Despite the abundance of research in the organizational field overall, there exists a literary divide between organizational change literature which rules the academic spheres and that which is being actively used by practitioners when embarking on a change process (Stouten, Rousseau, & De Cremer, 2018). Kotter's 8-step change model is one of a handful of exceedingly popular change theories written particularly with the non-academic reader in mind. With its accessible language, Kotter's literary works present a prescriptive universal model that promises to ensure successful change in any organization. However, despite his resounding success in book sales, there has been limited empirical research and theoretical reviews to be able to scientifically validate the 8-step model (Appelbaum, Habashy, Malo, & Shafiq, 2012; Stouten et al., 2018). This thesis will be unifying the shortage of theoretical and empirical data in both fields in order to explore how well Kotter as a change theory designed for a traditional hierarchical organizational structure performs in a meta-organizational context. In order to explore this topic from an empirical standpoint and attempt to bring some extra data to the lack of theoretical basis, the thesis will take the form of a case study of the Erasmus Student Network, or ESN for short. Over the past years, ESN has been immersed in a large structural change process officially dubbed the ESNreview. While it is common that organizations go through change processes, and some would argue that change happens all the time (Feldman, 2000), large structural change processes are a rarer occurrence. Even less so however, is it that the organization is open, transparent, and its process well-documented enough to conduct research on their change processes. As a European Non-profit organization ESN fulfilled were chosen as a good case.

1.3 Research Question

The main aim of this thesis is to explore the relevancy of Kotter's 8-step model within the particular structure of the meta-organization. Therefore, the main research question is as follows:

"How relevant is Kotter's change theory on organizational change in meta-organizations?"

In order to provide empirical data and understanding to this research, I will base my discussion on the findings when implementing Kotter's change model to the case study of the ESNreview of the Erasmus Student Network. The ESNreview is a structural change process which found place over several years within the meta-organization, and which was voted on twice; first in 2018, where it failed to pass, and then again in 2019, where it successfully passed. The processes leading up to the elections of both years will be analyzed using a most-similar case study format, based on data collected through interviews of members, participants, and literature research. A secondary research question has been formulated in order to explore and analyze this process:

"What made the ESNreview pass in 2019, and not in 2018?"

Finally, the findings from the analysis of the case study along with the initial literature study will form the basis of the further discussion and an attempt at responding to both research questions in inverted order.

2 Theory

This chapter aims to explore relevant theories which will later be implemented to analyze the findings of the data analysis, in an attempt to explore the research questions at hand. First, organizational change will be explored as a concept, followed by a critical introduction to Kotter's eight-step model, meta-organizations, and finally, a theoretical cross-examination of how Kotter's eight steps falls in line with the unique features of the meta-organizational structure.

2.1 Organizational change

"Change is the only constant"

Heraclitus, quoted by Mark, J., 2010

Whether it be the change of seasons, of day to night and young to old, changes happen around us all the time. While it holds many definitions, change as a concept can be most generally explained as something which is different from one point in time to another (Jacobsen, 2004a). In the world of organizations, change is today quite a common concept, as organizations must deal with the many changes of a globalized market and an ever-changing environment. Jacobsen calls these threats for driving forces, and divides them into external driving forces; technological advancements, and changes in rules and regulations, and internal driving forces; stakeholder conflict, bad work environment, and low morale, to mention some (Jacobsen, 2004). Being able to identify, react and adapt to the constantly changing demands around them, and to redirect resources efficiently to respond to the new threats are a prerequisite for an organization's survival (Appelbaum et al., 2012; Munduate & Medina, 2009).

Despite their commonality, change processes are often riddled with insecurity, uncertainty and stress for their stakeholders (Dahl, 2011; Munduate & Medina, 2009), as the organization struggles to break free from its familiar form and into new and unfamiliar – and possibly untried – structures and concepts (Harigopal, 2006) which the stakeholders may feel unprepared to handle or respond to (Ferris, Frink, Bhawuk, Zhou, & Gilmore, 1996). In addition to the uneasiness it may bring its stakeholders, change processes are often quite resource-demanding, requiring additional time and effort in addition to the normal operations of the organization. According to some researchers, as many as 70% to 90% of all change fail, underlining the significant risk organizations may face when attempting larger change processes (Gilley, Gilley, & McMillan, 2009). Understanding this, it may be easy to understand why many have such a negative reaction to the notion of change (Dahl, 2011), which introduces such an extra and often uninvited tax on their everyday lives.

At the same time, it is important to remember why organizations may attempt to change in the first place. According to Bloodgood, smaller organizations tend to take on increased change projects when the performance increases, likely in response to the organization expanding and meeting new opportunities and risks in the face of growing beyond their limits (Mintzberg, 1979). Larger organizations meanwhile, take on change processes when their performance is reduced, leading to a threat which must be responded to (Bloodgood, 2006). As such, change processes seems to rarely be started for fun, but rather out of necessity for the organization's continued survival (Waddell, Creed, Cummings, & Worley, 2019). Moreover, the driving forces behind the attempted change may differ vastly on a case-by-case basis (Jacobsen, 2004). An organizational change process cannot be driven to completion by one person alone (Gleeson, 2017; Kotter & Rathgeber, 2006), but requires that a larger part of the organization is on board and willing to take part in the process (Kotter, 2012). However, finding leadership and management styles that ensures that the organization becomes willing to partake in the change process may be the hardest test for the change (Burke & Litwin, 1992).

While there is a mere cornucopia of literature surrounding the topic of organizational change, and while the topic is being considered very relevant by many researchers and writers (Jacobsen, 2004), there is still a lack of empirical research related to organizational change in practice, and there is a lack of a clear consensus on what theories work when and where (Bamford & Daniel, 2005; Stouten et al., 2018). This lack of a unison voice and approach in the abundant field of organizational change, may help explain why many non-academic practitioners such as managers and boards find themselves turning to popular models such as Kotter's 8-step model for guidance in a difficult and perilous process. Such models are often prescriptive in nature, with easy language and linear, quite general steps which makes them more accessible and applicable to the general populous and their situation (Stouten et al., 2018).

2.2 Kotter's 8 step plan

Kotter's change model was first introduced to the world in a 1995 article in the Business Insider. A mere year later, the same theory was published as the book Leading Change, which since has gone on to be an all-time seller within the topic of organizational change. Over two decades after his 8-step model first was published, Kotter's works remain relevant within the world of organizational theories, his original book being the 11th most popular books on Organizational Change on Amazon (10.10.19, Amazon). While Kotter in his advanced years worked as a researcher, his most famous works remain firmly popular within popular science. The language of his books is kept simple, and the concepts easily accessible to the normal manager, with the organizational change penguin fable, Our Iceberg is Melting from 2006 as his most accessible work in terms of language and presentation (Kotter & Rathgeber, 2006). While simple, Kotter's model also aims at being universal, inadvertently claiming itself to be suitable for any organization if the prescriptive model is followed. The perspective of the books read as the stories from a fellow businessman rather than a researcher, and is void of scholarly references or proof (Appelbaum et al., 2012). As Appelbaum et al and Stouten et al point out, the empirical research that has been done into Kotter's model fades in comparison to its popularity, and except from Kotter himself there are few which have offered a notable attempt at testing the theoretical merits of the model (Appelbaum et al., 2012; Stouten et al., 2018).

Despite that Kotter has renamed the titles of his eight steps to some degree over the past decades, the description and content of each step vary quite little. This thesis will refer to the steps as they were referred to in his most recent work, Accelerate (J. P. Kotter, 2014), which is the version which is also most readily available on Kotter's own website (J. Kotter, 2014).

2.2.1 Create a sense of urgency

"People will not change if they cannot see the need to do so."

(Appelbaum et al., 2012)

In the first step of the change process, Kotter identifies the need to communicate the change to the stakeholders, and to ensure that they understand it clearly (Kotter, 1995). An important point for Kotter is not simply understanding of the threats and opportunities, but an understanding that the change has to happen quite soon in order to combat complacency – the state of being in content in one's own comfort zone, which is logically opposite to the nature of change itself (Kotter, 2008). In his work, Kotter assumes that the change maker, who may be a leader or any other stakeholder (Kotter & Rathgeber, 2006) has already identified, researched, and defined the risks and opportunities which must be reached with the call to urgency (Stouten et al., 2018).

While the eight steps in Kotter's model are all central to the theory, Kotter returned to the first step of urgency in 2008 to underline the importance of the success of this first step, identifying it as vital to the success of the overall change process (Kotter, 2008). This, he argues, should be achieved through bold and dramatic rhetoric and actions, and big goals to prove just how dire the situation is. The message should also be repeated often as to prove to the organization how important it is, and should if possible be given also in person (Kotter, 2012). Still, in his latter works, he warns against being too dramatic, as this can lead to unwanted effects. He divides the responses in this step into three important types:

a) Complacency

The assumed initial mindset of shareholders, where they are content and used to their day-to-day operations, often blinded by previous success or a history without crises. Kotter warns against complacency in the change process, as complacent shareholders may overestimate the organization's situation and fail to see incoming risks.

b) False urgency

Unlike complacency, false urgency happens when the members of an organization are urged into action through the will of a boss or the threats of the company's demise, however like complacency, it is rarely effective. While activity is seemingly increasing; more meetings are being held, more emails are sent, working groups are created and so forth, the work that is being done lacks the insight and focus to actually help solve the issue or cause change, even if the workers themselves think they are being efficient (Kotter, 2012). The threat of false urgency however is not just the increased resources being wasted, but that managers or leaders may mistake the false urgency for real urgency, and thus not understand how they fail to reach their goals in time.

c) Real urgency

Real urgency happens when members of the organization understands the underlying issue and works efficiently towards the goals as presented by the change makers. Kotter underlines that real urgency should be communicated through nigh-inaccessible goals that the stakeholders will want to reach (Kotter, 2008). Stakeholders who understand the real urgency are likely to support the cause and themselves work as changemakers either in big or small scale (Kotter & Rathgeber, 2006).

Kotter exemplifies the three reactions to feelings. While complacency is a denial and false urgency is brought on by fear or stress, real urgency is not a fear reaction, but a hunger and a will to achieve the organization's goals, and to win (Kotter, 2012). Whichever of these reactions that happens may be crucial for the future result of the change process.

Much literature on the topic of change management supports communication as an important step of the change process, however not every scholar agrees that Kotter's approach of dramatic urgency is the best one. Hiatt supports Kotter's recent addition (2008) in that excessive use of urgency rhetoric may hurt the credibility of the changemakers (2006; Staw, Sandelands, & Dutton, 1981), yet Armenakis and Gist is in agreement with Kotter's original statement on dramatic rethoric in what they name the burning platform, and adds that the use of external sources such as consultants may strengthen the weight of the message on the stakeholders (1993; 1989). Meyer and

Stensaker on the other hand disagrees with the concept of communicating the message of urgency first, arguing that communicating the message means little to the stakeholders if it does not allow for proper stakeholder involvement at an early stage (Lewis & Seibold, 1998; 2005), but that the stakeholders must rather be involved already at the identification of the problem in order to ensure their engagement. This is further supported by Vroom and Jago, who argue that involvement is more important for creating commitment to work on goals than simple one-way communication (1988), and Galinsky, who argues that an early and strong message from a position of power can undermine the stakeholders and cause them to keep their own opinions hidden, weakening the feeling of fairness in the change process (Jacobsen, 2004b; Van Knippenberg & Sleebos, 2006). This can be further ameliorated by the temporal aspect of the process; opposite to Kotter, Judson argues that change processes should happen at a slow pace that allows stakeholders to fully rationalize the decision, and claims that without misusing urgency, that one avoids the risk of losing the trust of stakeholders (1990).

Finally, Appelbaum et al concludes that the communication of urgency remains quite important to the change process, while Stouten et al argues that there may be aspects of Kotter's model which is not covered by the initial step. Several authors show that there may be other significant aspects which may not be covered by Kotter's call for urgency.

2.2.2 Build a guiding coalition

When the changemaker is confident that enough of their members sufficiently understands the issue and supports the need for change, they should gather a group of members which will be the heart of the discussion and function as driving forces to the change process. Who this group consists of may differ, however Kotter remarks that one person alone will not be enough to make change happen (1996). Instead, he argues that a guiding coalition should consist of 5 to 50 members, and that it is important for the leadership to be involved in the coalition in order to prove to both internal and external factors that the change process is a priority by the organization. Here he faces a disagreement with Peterson (2009) and Judson (1990), who argue that any leadership role should stay out of the coalition to avoid moving the topic on to the leader and the hierarchy they represent, which can affect stakeholder trust to the coalition and the process. Paper et al supports this view, warning that a monarchial attitude towards the coalition and its members will lower its trustworthiness, making it more likely to fail (O'Reilly, Paper, & Marx, 2012). Kotter continues by stating that the coalition should bring in people of diverse backgrounds, skillsets and positions in order to reach the different parts of the organization (Kotter, 2008). While Kotter relies mostly on the guiding coalition for its function as a social network to further communicate and spread the message of urgency, as well as to collect feedback on the process, Stouten et al points out that an issue of the guiding coalition may be trustworthiness. It is therefore important that the frames and identities of the stakeholders resounds with the ones projected by the guiding coalition (Kellogg, 2012; Sluss & Ashforth, 2008). Yet, Kotter offers little description of how the relationship between the organization and the coalition should work. There may also be struggles for one coalition to reach out as far as needed. Sidorko suggests that while Kotter's theory strictly only mentions one coalition, several coalitions may be needed to support the organization during the change process, either due to its size or the timeframe of the project (Sidorko, 2008). Appelbaum however generally agrees with Kotter's call for a guiding coalition (Appelbaum et al., 2012).

2.2.3 Form a strategic vision and initiatives

The first task of the coalition is to create a vision; the goal for which the change processes guide towards. Much like real urgency is needed to ensure that members of the organization understand the danger and works in ways which supports the change process, Kotter argues that the vision is essential to guide and lead the stakeholders' work in the direction the organization needs to go (Kotter, 2012). The need for a clear, consistent and well-articulated vision is well-documented in research literature (Appelbaum et al., 2012; Hope, 2015; Stouten et al., 2018). Kotter himself argues that an effective and good vision is essential to break down the status quo and look beyond (Appelbaum et al., 2012; Kotter, 2012), and Gallo takes this one step further by specifying that the vision statement should be kept ten words or less as to be memorable (Gallo, 2007). Flamholtz & Kurland point out the vision's instrumental effect on management's ability to produce and deal with better long-term goals and issues (2006), which is supported by Szabla, who argues that there is a significant relationship between the vision and how it is presented, and how the situation is being considered by members of the organization (2007). Stouten et al argues that one issue with the vision is based on who creates it, and that stakeholders may see their losses to be bigger than the goal the vision sets out to reach (2018). In order to ameloriate this, it is important that the guiding coalition work to provide a point of common understanding amongst the shareholders (Munduate & Medina, 2009; Stouten et al., 2018; Turner, Reynolds, & Subasic, 2008). At the same time, O'Reilly et al argues that vision, albeit important, is still not as central for the success of the change as is the communication and execution of the change in practice, suggesting that the entire point of a vision is easily overturned if the rest of the implementation fails.

2.2.4 Enlist a volunteer army

Previously called communicate vision, Kotter's fourth step calls for how to communicate the change on to the organization. How well the vision is communicated, he argues, is significant for making the stakeholders aware of and supportive of the change (Kotter, 2012). It is also quite important that one avoids inconsistencies with the messaging, as this may lower changemaker trust (Kotter, 1995). This message should be broadcasted as often as possible in order to convince stakeholders of the continued urgency of the change process, and through a variety of mediums as to reach out to the organization as a whole. This is supported by Oreg and Bordia, who both argue that good communication of a compelling strategy is crucial to motivate stakeholders to agree to the message provided (2004; 2008). Gallo underlines the importance of the short and memorable vision as a key to bring both members and external stakeholders on board, both in terms of emotions and financial resources (2007). Hope supports this notion, commenting that for stakeholders, even if they support the change, if they don't know what is expected of them through an easily understandable and well-communicated mission, their support will not efficiently assist the organization in its process (2015).

Lack of communication within organizations is a common issue, during organizational change processes (Papa, Daniels, & Spiker, 2007)Yet, it remains central that the management ensures good communication in order to reduce the uncertainty of internal and external stakeholders about the change process (Bordia, Hunt, et al., 2004; Lewis & Seibold, 1998; Munduate & Medina, 2009). A better report with members may also make them more open and willing to participate in the change process (Kotter & Rathgeber, 2006). When it comes to how the vision should be communicated, there are several methods. For Martin Luther King's "I have a dream", it was important that the speech was broadcasted on public media to reach as many people as possible. For an entrepreneur about to start a new company, they might wish to keep the vision closer to their chest in the beginning in order to ensure that their idea is not stolen by competitors. For already existing organizations however, information should be repeatable (Kotter, 1995), be given in person whenever possible (Goodman & Truss, 2004), and come from an immediate boss or supervisor for the greatest effect (Klein, 1996). Medina and Munduate suggests that the role of the manager is particularly important in order to bring information in an accessible manner, as well as to bring feedback back (2009). However, Judson and Hope point out that those who are tasked with communicating the vision further, such as managers, may also require training in order to be able and willing to pass this message on in a believable and consistent manner (2015; 1990).

2.2.5 Enable action by removing barriers

As organizations may differ vastly from one another, they may have various sets of obstacles to proceed with a change process. While some of these are bureaucratic or monetary, Kotter mainly focuses on the obstacles in the form of people as individuals or groups who are actively opposing the change process (Kotter, 2008; Kotter & Rathgeber, 2006). As a resource-demanding process which often puts the organization and its members out of its comfort zone, change processes may increase the uncertainty of stakeholders' daily lives (Kotter, 2012; Kotter & Schlesinger, 1989). Whether it is a worker who fears that a merge of two companies may leave them unemployed, or a member who fears the process may alienate them, it is likely that some may remain skeptical about the process. Therefore, it is significant that one is aware of how to deal with those individuals that might be an obstacle in the process. However, it is also important to note that Kotter assumes that the previous steps if done correctly, should leave only smaller groups of opposition, and that alleviating the opposition becomes a much more difficult task if that is not the case (Jacobsen, 2004). Continuing, Kotter considers that empowerment might be the best way to deal with employees (Kotter, 1995), a notion which is supported by O'Reilly et al and Lines (2010, cited in Appelbaum, 2014), as well as Stouten et al, who argue the importance of bottom-up methodology to strengthen ownership and ensure that the employee base would feel part of the change process (2018). Strebel also agrees that by renewing the social contracts and providing awareness to the employees' role in the organization and in the change process, they are more likely to take active part in the change (Strebel, 1996).

Furthermore, Kotter describes how changemakers should encourage stakeholders to connect in smaller interorganizational groups to work on implementation and common issues, in order to cover changemakers' blind spots and support stakeholders' empowerment of the change process (Kotter, 2012). However, Aquino et al argues however that for stakeholders who feel slighted or left out of the process due to lack of empowerment may not feel any inclination to reconcile with the changemakers, making it hard for the changemakers to make them part of the process (Aquino, Tripp, & Bies, 2006).

2.2.6 Generate short-term wins

Once the organization has become unfrozen and ready to start changing (Wirth, 2004), Kotter points out that it is important that the change makers to point out the positive effects the change has along the way, to strengthen the legitimacy of the change process and keep morale up (2012). These short-term wins should happen within two years of the change process having been initiated and should be clearly communicated and visible to as many as possible, as well as having some aspect which may be considered meaningful for the stakeholders. At the same time, Kotter warns against communicating short-term wins or goals as ends to change processes, as this may lead stakeholders to suppose that the process has been finished and return to a complacent state where it is hard to reinvigorate them to further change (Kotter, 2008). This becomes particularly important as a response to Kotter's insistence on large, hardly reachable goals as a way to inspire members (J. Kotter, 2014). However, Kotter warns that successes may also lead to complacency – thus it is important that the success is not celebrated endlessly, but rather is specified as a piece of what is needed to reach the envisioned future, rather than an end goal in and of itself, and that it remains clear where the short-term goals fit into the bigger vision (Kotter, 2008).
Stouten et al argues against Kotter's definition of short-term goals as anything within a two-year period, suggesting that a process which too heavily favors measuring tangible results may lead the organization to lose focus on actions which could have supported their development, as well as failing to value the many results which may manifest after the limited period (2018).

Kotter also advices that the work in this stage of the change process is divided into two; while management should continue to communicate and reinforce the message of urgency to avoid complacency, stakeholders and management should be empowered to focus more on the interorganizational groups of the previous steps, building on the change by solving issues on their own accord and making the change process their own (Kotter, 1995). Kotter also points out that while this may lead to the stakeholders adopting new goals which were not part of the guiding coalition's initial vision, those directions should nevertheless be explored and worked on, potentially leading to the evolution of new additional structures and concepts to complement the initial change. Cummings and Worley support this notion, proposing that the continuation of the change process on other levels and its support through changemaker support and monitoring is crucial for the continued success of the change process, while Beer suggests that it is equally important to provide the stakeholders with the necessary freedom and resources to make their own change process (Beer, 2009).

2.2.7 Sustain acceleration

Previously referred to as build on the change, Kotter points out that once the previous six steps have been completed and the change process is well underway, Kotter warns against seeing a successful change and its completion as end-games, instead urging changemakers to continuously set new goals in order to ensure that the organization stays fluid (Kotter, 2008; Wirth, 2004). Managers are vital in this step, to continue to push the members towards a continuously evolving organization, and to avoid regressing back into old routines. As such, the seventh step in Kotter's model has two challenges:

a. To implement the changes and prove to the organization that the new system works, and;
b. To ensure that the organization stays in a fluid state where it can continue to change and grow through new goals.

Meyer and Stensaker points out that change fatigue may become an issue for managers who continue to push change through urgency (2016), and Kotter underlines that it is important that the stakeholders feel the real urgency with an actual want to reach for the vision for it to be possible to continue to pursue it over time (2012).

2.2.8 Institute change

Once the goal has been reached and is becoming implemented, it is imperative that the changemaker works to ensure that the current state becomes part of the norm of the organization, whether this be a change-mindset, strategic or quite straightforward physical changes. Again, there are two important steps Kotter outlines to ensure the success of the change:

a. Prove to employees that the new approaches improve performance, and;
b. Ensure that the next generation of management adopts the approach.

Here, Kotter argues most for the importance of the implementation of changes in social norms, and not as much for formal structural changes which would be harder to turn back by behavior alone (Appelbaum et al., 2012). Massey and Williams argues that support structures are needed to ensure the sustained implementation of the change, and that these structures should offer monitoring, training and shadowing, as much as communication and recognition of members who show initiative regarding the change (2006). While there is limited research to support the need for and effect of institutionalizing changes in the organization due to the difficulties of researching effects which often take place after the end of the research periods (Stouten et al., 2018), similar change theories are in agreement that institutionalizing the change is important to be able to call the change process a success (Appelbaum et al., 2012).

2.3 Impact and critique of Kotter's change theory

While Kotter has been, and continues to be highly influential, the 8-step model is not entirely without its critique. Some of these have already been mentioned within the introduction to the model itself, however there are also overarching criticism to the model which should be addressed.

In line with similar popular science change management literature, Kotter presents his model and theory based largely on his own experiences or with experiences with closed companies, and without referencing other scholarly sources (Kotter, 1995). Appelbaum therefore calls for further empirical research to validate Kotter's theory in practice, as most of the existing cases on the theory have been made by Kotter himself (Appelbaum et al., 2012; Kotter & Cohen, 2012). One reason for this is that Kotter has precedence in private companies and organizations, which often are not open and transparent to the public eye and to the researcher. Documentation of the change process may also be poor, as even planned change processes are likely to contain some aspect of random chance (Cohen, March, & Olsen, 1972). Of the empirical case studies that exist outside of Kotter's work, another issue is that the case studies rarely follow all the model's steps. As the last steps of the model have a timeline of one to several years (Kotter, 2012), it becomes difficult for many researchers to follow organizations for a long enough time period to research the full process. On a similar note, Stouten et al also points out that some of the aspects of the last steps can be hard to measure, making it increasingly difficult to provide valid scientific results (2018). These aspects makes it significantly harder to create a generalizable consensus as to the success and viability of the model overall. Still however, Kotter's vast popularity amongst private companies, albeit not well documented in academic research, still makes it a valuable topic for further research and exploration.

Alike other model of the same kind, Kotter's model is prescriptive and akin to a recipe, where each step precedes the next in a temporal fashion (Stouten et al., 2018). Thus if one step fails, it may have a negative domino effect on the rest of the process (Bass, Waldman, Avolio, & Bebb, 1987). While Appelbaum concedes that Kotter's steps still remain valid and some are more important than others (2012), Stouten et al is more critical in the support of Kotter's method, particularly the continuous push for urgency, which he argues may negatively affect stakeholders (Hiatt, 2006; Staw et al., 1981; 2018). In this regard, Stouten also mentions the negative effect change processes may have on stakeholders, and recognizes that both leadership, skill and stakeholder identity makes a difference in the change process – aspects which are mostly exempt from Kotter's original theory. Regardless, while certain aspects of Kotter's model lack certain perspectives which harms its universality, Appelbaum concludes that the model is overall still quite resilient, although further research should be conducted to provide more generalizable results. Appelbaum's review is still however focused on traditional organizations and does not pay particular mind to organizations which fall outside of the common organizational structures and forms, such as the meta-organization. This is important to keep in mind when trying to consider how Kotter's model may fit with other organizations. Kotter's model presents and promotes itself as a universal model without discussion or reflection as to whether it may indeed be suitable in all cases. While all organizations are different on some aspects, this idea of a universal model becomes central to consider when examining organizations with structural features that are not normally found in traditional organizations, particularly in linear hierarchies. The meta-organization is one such structure.

2.4 Meta-organizations

Ahrne & Brunsson were the first to coin the term meta-organization in their book of the same title of 2005. Since then, more researchers have joined to discuss the topic and work out its implications, both in the practical and theoretical sense, also some which do not necessarily agree with the initial definition of a meta-organization. As such, this chapter will try to describe what the current literature says on meta-organizations, both per definition, but also what is still discussed, or which is yet to be explored.

The meta-organization is an organizational structure wherein an organization which consists of legally autonomous actors and open communities (Ahrne & Brunsson, 2005). Whereas Ahrne and Brunsson specify that these actors, or members, may only be other organizations, Gulati, Puranam and Tushman argue that these actors may consist of a mix of individuals and organizations (2012). While the term is still not in widespread use, Ahrne and Brunsson argue that there are far more meta-organizations than one may initially believe, and estimate that as many as 90% of all multinational organizations may be classified as meta-organizations, with more than 1600 such organizations existing in Sweden alone (2005). Some examples of such meta-organizations may be the European Union or the UN, where the members are its member states, but it can also be smaller or more localized, like a trade union or the Scouts with its local chapters. In addition, meta-organizations may consist of several layers of member organizations within member organizations, in which case they may be defined as meta-meta-organizations, meta-meta-meta-organizations, and so on (Ahrne & Brunsson, 2008). While so many organizations fall within the description of meta-organizations, the literature on this organizational structure is still limited, and several authors call for more research on the topic (Berkowitz & Bor, 2018; Brunsson & Bor, 2019; Spillman, 2018). Therefore, it remains unclear how well much of existing organizational theory which may actually be relevant to describe the processes and phenomena found within meta-organizations.

While Ahrne & Brunsson's definition of a meta-organization assumes a mainly horizontal organization where members are valued equally (2008), Gulati et al argues that not all meta-organizations are born equal. Rather, he divides meta-organizations into four main types along two scales; stratification, which is the level of hierarchy, and boundaries, which describes how easy it is to enter or leave the organization. Using these two factors, they present four types; the closed community, the extended enterprise, the open community, and the managed ecosystem. While Gulati points out that organizations may subscribe to one of the types on the meta-organizational level and another on other levels, Radnejad, Vredenburg and Woiceshyn takes it one step further by claiming that the meta-organization itself may be fluid and that its type may alter depending on where and when you look at the organization (2017)

In order to better understand how meta-organizations differ from traditional organizations, one must first understand the context in which meta-organizations exist. According to Ahrne and Brunsson, the environment in which organizations exist are naturally hostile and competitive (2008). In such an environment where many organizations struggle to survive, they may decide to flock together in order to better their chances and strengthen their position. Berkowitz and Bor defines two main reasons for why individual organizations may come together to make meta-organizations. The first is to collaborate and cooperate in a common voice, to increase their influence and ensure that their voice is heard in meeting with external stakeholders. The other is to provide a common playing field, where organizations may work together, negotiate, or create standards and rules to regulate and ensure that the quality of the field is upheld (Berkowitz & Bor, 2018; Bor, 2014).

While traditional organizations' members commonly are individuals whose relationship with the organization is dictated by formal contracts and monetary transactions, meta-organizations are built upon the common interests and objectives of its members (Gulati, Puranam, & Tushman, 2012). In addition, these members are oftentimes mainly organizations with their own daily tasks, goals and agendas whose membership in the meta-organization is voluntary rather than mandatory. Because of this, the decision-making power of the meta-organizations rarely lies with the board or leader of the meta-organization itself, but rather with its members. While this is not entirely unique to the meta-organization, it does provide some additional difficulties with regards to decision making, particularly as organizations may have quite varying traits compared to individuals, such as different constitutional and administrative structures (Ahrne & Brunsson, 2005). In addition, most, if not all individuals in a meta-organization will also be members of their own organization, not to mention the possibilities that they are also members of other meta-organizations (Ahrne & Brunsson, 2012), thus is important to recognize the dual allegiance (Webb, 2017), and dual identity (Richter, West, Van Dick, & Dawson, 2006) the membership demands of the members. The meta-organization is commonly just an addition to the member organizations' own daily routines and tasks, and as such walks a fine line between the benefits it can give to any organization and what it can demand in return (Ahrne & Brunsson, 2008, 2012). Depending on the openness of the meta-organization, members may be able to enter and leave freely if the matters or the demands do not suit them, and this with little change to their internal operations (Radnejad et al., 2017), at the same time the meta-organization often holds little power to elect or ban members, which is the power of its members as an unit rather than on its own (Callbo & Jacobsson, 2018).

While meta-organizations in some cases are specifically created to regulate an industry, market or group, the internal decision making process may not be so straightforward, on accounts that there may not be one single formal authority in a meta-organization (Heine & Kerk, 2017). While most organizations have a leader, board, or manager which stands for most of the decision making, meta-organizations have disconnected layers of leaders, where the leading body of the meta-organization has no formal power over any of its members, which have their own leaders on the organizational level. Because membership in a meta-organization is a voluntary task, and because the meta-organization would not exist if it had no members, there exists an often disparate dependence between meta-organizations and its members. While the meta-organization is dependent on having members to exist, in most cases the member organizations would manage perfectly fine without the meta-organization (Ahrne & Brunsson, 2012). Because member organizations may be free to leave as they please depending on the openness of the meta-organization, members often reserve considerable agency over their own actions compared to individual members in traditional organizations and may keep their own organizational culture separate from that of the meta-organization. Therefore, it is important that the members within the organization come to an agreement so that members don't feel overrun and flee. However, while finding a common ground may be hard in any organization, it may be even more so in meta-organizations, not only because of the members' autonomy, but also because of the potential differences between the members. Because the complex organization don't have the power to overrun its members, most decisions within meta-organizations are based on either consensus (Ahrne & Brunsson, 2008; Berkowitz & Bor, 2018), a majority of votes (Karlberg & Jacobsson, 2015), or a mix of the two systems based on the situation at hand (Winand, Dolles, Malcourant, Vas, & Zintz, 2015). While this system ensures that most members may be on the same page regarding the actions of the meta-organization, it is a slow process, which damages the meta-organizations' ability to respond quickly to changes in the environment (Hollen, Van Den Bosch, & Volberda, 2014).

Gulati, Puranam and Tushman specifies the importance of understanding and taking the member organizations' interests and goals into account when taking action on the meta-organizational level, while Berkowitz and Bor argues that this may be difficult to achieve in practice, as while members have a responsibility to have allegiance to both their own organization and the meta-organization, the meta-organization should primarily address those matters which brings resources to the industry (Berkowitz & Bor, 2018) and act as a boundary spanner – a contact point – between the industry and its stakeholders (Williams, 2002). While there are several organizational theories that attempts to deal with the issue of change and leadership within organizations, there are few that takes the disconnected leadership of the meta-organization into effect, both when it comes to leadership in boundary-spanning organizations (Williams, 2002, 2012), as well as how change management is conducted and affected by the structure of meta-organizations (Brunsson & Bor, 2019).
Ahrne and Brunsson note that there is quite little turnover in meta-organizations compared to that of members in traditional organizations (2012). As organizations may survive considerably past the expected lifespan of humans, as well as due to the lowered likelihood of changing interests, the organizational members of meta-organizations are likely to stay members for a long time (Ahrne & Brunsson, 2012). However, it may be

valuable to make a distinction between the organizational members of meta-organizations and the actual human individuals who represents on behalf of these member organizations and realize that they are not necessarily one and the same. While the organization may stay a member without much change, their representatives may have a much more rapid turnover. The distinction between human representative and member organization should also be considered in other aspects, particularly as one moves into the topic of change management. Ahrne and Brunsson quite aptly notes that organizations don't feel, but humans do (2008). Thus, in organizational change in meta-organizations, the voice of decisions may come from a membership organization, but the rationale and process behind that decision comes from humans. This becomes particularly important as one moves to consider how the meta-organization fits within traditional change theories.

2.5 Meta-Organizations in Kotter's model

There is thus far quite limited research on change processes in meta-organizations as well as how they fit in to traditional organization theories in general (Brunsson & Bor, 2019). Thus, this subchapter aims to marry Kotter's change model with the meta-organizational structure, and evaluate whether and if, where discrepancies may cause problems. The analysis will rather be based on theories related to either of the structures or to change theories in genal.

As shown in the previous chapter, meta-organizations by their structure have some quite significant variations compared to most traditional organizations:

Differences in members: Meta-organizations may consist of a wide range of members, both organizational and individual. Those members, hailing from their own cultures and geographical areas, might have vastly different realities, problems and priorities from one another. This is already an issue in traditional organizations where members see the world through their own position and worldview (Jacobsen, 2004b; Thagaard, 2013), however Ahrne and Brunsson points out that organizations often hail to much larger differences than individuals do, in terms of not only organization size, culture and expertise, but also in formal structures and age which may enlarge these differences and making it harder to communicate and collaborate, as is so often exemplified in mergers between organizations (Chaison, 1986; Mottola, Bachman, Gaertner, & Dovidio, 1997)

Dual allegiances and identities: The individuals that partake in meta-organizations often do so as representatives of member organizations within the meta-organization (Ahrne & Brunsson, 2012). Their status as an active member on both meta-organizational as well as on organizational level may affect their judgement, as well as their interests, as the members become boundary spanners as well as gatekeepers for both their own and the meta-organization (Ahrne & Brunsson, 2008). However, it also means that it demands resources from the member while they are likely to still have to practice as per usual in their own organization, meaning that members might not be as willing to invest as much resources into the meta-organization as they would in a change process in their own organization (Richter et al., 2006; Webb, 2017).

Agency: While the exact role of the meta-organization differs both in its mission and in its relationship with its members, a standard is that there is no formal contract binding the membership organization to stay with the meta-organization (Ahrne & Brunsson, 2008). Because every member organization retains its own leadership structures, it is fairly limited as to how much power the meta-organization has over its members (Ahrne & Brunsson, 2012), and its ability to create positive and negative incentives to force members may therefore be limited (Berkowitz & Bor, 2018). As a result, the agency of members within the meta-organization tends to be significant, both over their own organization as well as as a part of the meta-organization as a whole (Ahrne & Brunsson, 2005). This retention of agency is significant, because it means that members to a larger degree may choose whether to follow the trends and wishes of the meta-organization. On the other hand, the meta-organization has very limited agency over its members, but must ultimately adhere to their wishes (Berkowitz & Bor, 2018).

Consensus: Because the meta-organization has no direct power over its members, it has to walk a fine line when it comes to decision-making. Often, meta-organizations decide through consensus or voting (Ahrne & Brunsson, 2008). This means that the leadership of meta-organizations have considerably less power than traditional leaders, and the time it takes to come to a decision might be longer than for most organizations due to the consultation process involved. The slow reaction time may also result in missed opportunities (Hollen et al., 2014).

Information flow: Because of the nature of the meta-organization as a multi-level organization, information may flow differently than it would in traditional hierarchies and other traditional structures. This is made increasingly difficult because every member has the agency and responsibility to act as a boundary spanner and transfer the information from one level to the next, and because the sender and the receiver of the information may have differing experiences and interpretations of the topic and concepts being discussed.

Interests: While meta-organizations often are specifically designed to work as umbrella or interest organizations for its members, Berkowitz and Bor raises the issue of interests. Because it exists on a different level than its member organizations, the meta-organization's main issue should be to reach out to those external stakeholders that its members individually can't reach. However, focusing on catering to external stakeholders may not be in the perceived interests of the members, resulting in various understandings of what the meta-organization's mission is (Berkowitz & Bor, 2018).

Due to the nature of Kotter's model as an organizational change model initially created with hierarchical organizations in mind and which therefore is quite top-down, these aspects are likely to have an effect on members' acceptance of and willingness to participate in the change process, as well as on information flow. This will be further explored through an analysis of the meta-organizational framework in Kotter's 8 steps.

2.5.1 Create a sense of urgency

In order to activate the organization into changing, it is first important that the organization understand why the change is needed, and why it must happen sooner rather than later. This endeavor should start from those with most influence in the organization and work its way down (Kotter & Rathgeber, 2006). Kotter specifies that to communicate the urgency to the organization is of highest importance, and this repeats itself in future steps. While this may be difficult in any organization, the meta-organizational structure invites some particular issues. Primarily, due to the division of power within the meta-organization, the members are the ones with decision-making power, either through consensus or a voting majority. Thus, while some members may have more influence than others, by formal standards they are the same. It is therefore reasonable to expect that all the member organizations would have to receive this message. This also inadvertently means that many of the stakeholders needed to ensure that the change happens, have to be involved from the first stage of Kotter's model, whereas in the original theory this inclusion seems to be a much more gradual process that goes over several of the steps (Kotter, 2008). Once the message has been parsed, the member organizations, or rather, those in the member organization with a boundary spanning role towards the meta-organization, have to accept that the message they have received is both true (Bordia, Hobman, Jones, Gallois, & Callan, 2004), and important to them (Hertel & Solansky, 2011). Jacobsen points out that different individuals will have different perspectives, background information and interests on which they consider and rationalize the situation within the organization (2004b). If the message spread by the changemakers does not fall in line with the members' perspective of the identity of the meta-organization, they may choose to reject the message (Sluss & Ashforth, 2008), which is an issue in the meta-organization, where decisions are made by consensus or majority. Due to dual identities of the members and depending on the structure of the organization, it may be likely that members have quite different concepts of what the meta-organization's identity is, compared to that of the leadership of the meta-organization. This is further problematized by Berkowitz and Bor, who points out that the leadership of meta-organizations have a role that caters more to the external stakeholders of all of its members, than to the members themselves internally (Berkowitz & Bor, 2018). Therefore, in situations where the meta-organization's own leadership are the changemakers, the change message must not go against the perceived goals of neither the members nor of the meta-organization itself. Considering that meta-organizations can vary wildly in both number of members, as well as geographical and cultural span among other things, it does not seem unreasonable to assume that there will be few members with complete knowledge or who are considered by the rest of the organization to have a complete expertise of the whole meta-organization and its members. This may make it more difficult to ensure that all the member organizations identify with the message and the problem which is raised, and third, because the members are also part of their own organizations, they also have to view the message as urgent and important enough to possibly take of the time and resources of their own organization to support the change process in the meta-organization. Due to the decision-making process within meta-organizations, this also may be a delayed process from what it would have been in a traditional organization, as the members reach agreement. Only when these three issues have been solved may the changemakers move on to the second step of the process.

2.5.2 Build a guiding coalition

Once urgency has been established amongst the boundary spanners, Kotter advices that a coalition is created to help spread the message further, to manage the information flow, and work on the change process itself (Kotter, 2012). These 5 to 50 members may have various strengths, however it is important that the coalition in its entirety contains both formal and informal power in the organization, in order to manage and strengthen the validity of the project (Kotter & Rathgeber, 2006), and Kotter particularly suggests that some formal leadership of the organization should be part of the coalition to give it formal weight (Kotter, 1995).

While a single hierarchical organization is likely to have certain members which to certain degrees hold either formal or social power over the whole organization, such like the CEO, this notion gets muddled when considering the structure of meta-organizations. Here, every membership organization is likely to have their own strong formal and informal characters, however, while their power within their own organization might be formidable, this status is not guaranteed to transfer across organizations (Ahrne & Brunsson, 2005). In addition, there might be too many member organizations to bring every such individual into one coalition, or otherwise, the member organizations may not hold expertise that is useful or necessary in the guiding coalition. Indeed, Kotter very strongly advocates against inviting individuals who may spread negativity or second-guess the point of the change into the coalition (Kotter & Rathgeber, 2006), which may be an issue as individuals of the member organizations have to respond not only to the interests of the meta-organization, but are also likely to keep the interests of their own organization close to heart, which may not overlap, and may also damage the report of the coalition towards member organizations which are not represented in the coalition. As a result, meta-organizations are faced with a difficult choice when selecting the actual members of their coalition, because the influence of each coalition member may be relative to their own organizations, but not to the meta-organization as a whole (Stouten et al., 2018). Some argue that coalition members should rather be elected from outside of the meta-organization entirely

(Armenakis et al., 1993), however depending on the organizational structure this may or may not succeed.

2.5.3 Form a strategic vision and initiatives

Once a coalition has been created, their first task is to create a vision to guide the work, as well as initiatives to initiate movement towards the created goals. In the meta-organization it is likely that all boundary spanners are already aware by this point that a change must happen, however due to their agency, it remains the responsibility of the members to ensure that that information is sufficiently spread throughout their own organization if necessary. Whether or not it actually is necessary for all the individual members of a member organization to know about the change may vary greatly based on the actual nature of both the meta-organization and the member organization. In organizations where the member organization is more deeply involved in the change, the process may have to be repeated as before. Still, it remains vital that the strategic vision resounds with the member organizations' understanding of the relationship, as should the initiatives.

2.5.4 Enlist a volunteer army

Kotter suggests that the vision should be communicated as often as possible, through different channels, and best in person (2012). It is vital that the message of change is perpetually communicated, he argues, in order to ensure that it is not forgotten or deprioritized (Kotter, 2008). For organizations with other levels as members, possibly spread over large geographical distances, this direct face to face communication might be difficult, if not impossible to achieve. Instead, the guiding coalition may attempt to bring their boundary spanners into the project to communicate with their member organizations. Due to the autonomy of the members, it can be difficult to ensure that the vision is in fact communicated clearly and in the manner that is expected.

2.5.5 Enable action by removing barriers

The autonomous nature of the relationship between the members and the meta-organization may limit the accessibility of top-down approaches to implement changes, as is reflected in how most meta-organizations are led through membership consensus or votes. While smaller groups or obstacles may be solved or overlooked in favor for a majority in some meta-organizations, it becomes harder for the organization to handle situations where there are several sources of obstacles. It also makes it harder that the members who decide may be varied in the first place, making it more likely that some may disagree.

2.5.6 Generate short-term wins

Once the process is well underway, it is important to communicate the ongoing success of the change process through short-term wins and goals. In this process Kotter points out that it is quite important that one does not take a short-term win too seriously, so that members misunderstand the process as complete before that truly is the case. In the situation where members also have their own organizations to take care of this becomes particularly important, as members may assume their part has been done and move back to focus on their own organizations if not communicated well. Because many meta-organizations are created simply to handle a single project, it is also central that the organization itself is not disbanded before the change is successfully implemented (Berkowitz & Bor, 2018).

2.5.7 Sustain acceleration

Once the process nears completion, it is important to ensure that the organization continues to hold on to its openness to change, according to Kotter. Because members of meta-organizations by default also have their own organizations' matters to attend to, they might not be as willing to adopt the same culture as the meta-organization hopes for if it does not match with their own organization culture. In addition, the increased amount of resourced demanded by the meta-organization during the change process may not keep up after the process is finished. Indeed, members may instead become fatigued by overexertion and conclude that the meta-organization has had enough resources for a while. This is particularly an issue because while traditional organizations may reconfigure their resources to allow for the time needed to perform the changes, members of meta-organizations are likely to have to continue with their normal operations while the meta-organizational change goes on at the same time.

2.5.8 Institute change

Once the change process is close to completion, it is vital that one ensures that the organization does not fall back into the same old routines. In cases of formal or structural changes this may be easier to handle than cultural change processes, however, as structural and cultural change often go hand in hand (Jacobsen, 2004a), neither should be dismissed.
In situations where the meta-organization was created to work on that single task however, it may be disbanding as it reaches this step. In those cases, it remains up to the member organizations should take the change back to their own organizations and ensure that it is properly implemented there.

2.5.9 Summary of meta-organization in Kotter's model

Based on the discussion in this subchapter there seems to be several aspects which theoretically seems to may make the use of Kotter's model in a meta-organization structure challenging based on the previously introduced aspects in 2.5. However, due to the potentially quite significant variations in organizations and meta-organizations it remains difficult to generalize the actual results based on organization alone. The biggest difference in this case seems to be the timeline. As many members have to be included early on, the importance and tasks of the following steps become somewhat muddled.

3 Research Methodology'

"All research should be built on the methods one finds most reliable to find answer to the research question"

(Tjora, 2012).

This chapter will describe the choice and use of various research and data collection methods, as well as the selection of data sources and selection of case and informants.

3.1 Research strategy and study design

As a previous Development Studies student, most of my previous research and experience from research methods come from the anthropological traditions. Whereas the political sciences often argue that you should find your theories first, to gain a better understanding of the topic at hand and to ensure the efficiency of the research, and then go out in the world and check how well they may be implemented (Marsh & Stoker, 2002), the anthropological view is the opposite – that your data should be done separately from and unbiased of theory, and then you see if the theory is applicable (Willis, 2011).

As might be understood, these two methods performing research are at logically at odds with one another, however, it might be argued that that does not necessarily make them inconsolable with their opposing research traditions.

Indeed, the strengths of the social science traditions is that it provides a focused approach to the research question at hand – to dig further into the theoretical landscape that already exists so as to gain better understanding of current theories, and whether or not they are reliable (Tjora, 2012). Meanwhile, the anthropological traditions may give the researcher a larger room for exploration outside of the existing theoretical research and framework, to explore uncharted theory free theoretical bias (Rigg, 2007).

Untraditionally, I have opted to collect most of the data for this thesis before a theoretical framework – and also a research question – was set in place. While the anthropological mindset remains strong in me, the choice was not entirely instinctual – instead it became a mix of anthropological and social sciences, basing observations on the theories I had already learned through my studies, and then again using those findings to create the research question in which it would be studied. Considering the lack of theory on the topic of meta-organizational change, and the focus on one specific organization, I believe this method might just work. Based on these chosen traditions, as well as my choice of a singular case study, I concluded to base my data collection on qualitative methods. The main purpose of the qualitative methods is to go in depth and to explore the intricacies of the subject at hand (Thagaard, 2013). The qualitative methods were the most suitable to my specific topic because the main goal of the study is to go in depth on the changemakers' journey of causing change in a complex organization.

3.2 Case study

"Thus, a paradox: Although much of what we know about the empirical world is drawn from case studies and case studies continue to constitute a large proportion of work generated [in the political sciences], the case study method is held in low regard or simply ignored."

John Gerring, 2004 (emphasis in original)

In an attempt to join the mismatch of explanations as to what the case study entails, John Gerring describes the method as "*an intensive study of a single unit with an aim to generalize across a larger set of units*" (Gerring, 2004). It is important to note that a single unit does not mean a single example. The case study method is a method of change, where the findings lie in the differences or likenesses between two or several cases. With this definition, a case study can be spatial, focusing on two or more different countries or companies, or divisions thereof, or it can be temporal – looking at how one unit has changed over time. Together with the variable of the number of units, spatial and temporal makes up for six variations of case studies; a-theoretical, interpretative, hypothesis-generating, theory-confirming, theory-infirming, and deviant (Gerring & Cojocaru, 2016). Gerring and Seawright warns against selecting cases on random (2008). Gerring and Cojocaru goes on to explain that when selecting the cases, those can be selected using one of four main types; most-similar, anomalous, most-different, crucial, and representative. While these types are again divided into their own sub-types, for the sake of brevity I will refrain from outlining them all. In this thesis, a most-similar sub method has been used. The most-similar methods are based on comparing cases that have much in common and attempting to identify the differences between them (2016). The specific sub method is called the testing version. Here, two similar cases are set up against one another, and through the similarities and differences one attempts to determine what may have caused the changing results between the cases.

For this thesis I have selected one single organization which will be divided into two cases. The case is the Erasmus Student Network (ESN), a European-based international meta-organization which in the last years have been in the middle of a restructuring process, named the ESNreview. Earlier this year, Brunsson & Bor published a short article calling for more research to be done on meta-organizations, then with particular focus on organizational change theories (Brunsson & Bor, 2019). As an NGO, ESN has a lot of documentation on its processes, most of which are readily available on their websites. It is not quite so often that one has the opportunity to research a meta-organization on the cusp of a large structural change, nor one with so much documentation already in place.

As there is little documented research on meta-organisations in general, there is also not quite much on how well organizational theories and organizational change theories fit into the meta-organizational framework. As the most famous change model, Kotter's eight step plan has been reveled for over two decades for its universality – however as of yet there does not seem to have been any attempts to see how the model fits with the meta-organizational structure and its quirks.

For my thesis, I have chosen to focus on a single organization as my unit, the Erasmus Student Network, and will be studying it at two formally different points in time during which it has been conducting its change process, the ESNreview. The process of researching a single case based on time commonly referred to as a case type I (Gerring, 2006). The case itself is interesting because it is a meta-organization undergoing a large change process – which of there still is limited literature (Brunsson & Bor, 2019). In addition, I have been lucky enough to be a part of the organization for some time, which has greatly increased my opportunities to be present and collect data during the process, as well as the availability of data.

I have decided to formally split the ESNreview process into two units:

a) The process leading up to the voting at the Annual General Meeting (AGM) Costa Brava, Spain, in 2018, and
b) The process leading up to the voting at the AGM Thessaloniki, Greece, in 2019.

3.2.1 Erasmus Student Network

The unit I have decided for my case study is the Erasmus Student Network, or ESN for short. With over 40,000 student volunteers (ESNers) catering to the needs of 350,000 international students in 41 countries, ESN is Europe's biggest student organization (E. S. N. AISBL, 2019a). Having existed for 30 years, the organization first began in the Netherlands by a group of students who had just returned from their Erasmus (a EU-based scholarship program for international exchange)-exchange, and wanted to hold on to the multicultural feeling of their exchange experience, as well as to help support the Erasmus students coming to their campus (E. S. N. AISBL, 2014). With the European Commission as a strong partner, ESN has continued to be an important stakeholder, advocating for students' rights, better information, easier exchange procedures, and general support to students on exchange, and the recognition of volunteering and informal education (E. S. N. AISBL, 2019a). In organizational terms, ESN is a meta-meta-organization, with three levels of organizations existing within one another (Ahrne & Brunsson, 2008). This is best illustrated through the organization's own organizational map:

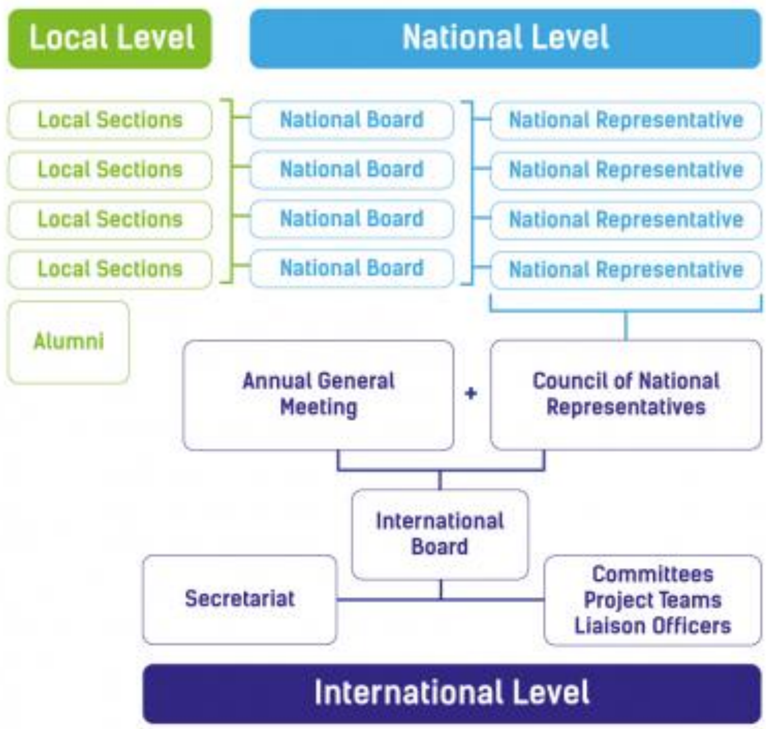

Figure 1. A visual representation of ESN's internal governance structure (E. AISBL, 2015)

ESN is put together of three different levels, each level which is represented by their own organization:

The local level; the local chapters of ESN, the "sections", are where most individuals start their membership cycle. The sections are where ESN and the international students meet and is also where most of the activities directed towards the exchange students happen. There are over 500 sections in the network, each with their own vote which they use to vote on who is to represent them on the national and international levels, as well as on all major decisions in the organization. Any organization that wishes to become a section within the network must first be approved by the other sections within a country. Sections pay annual membership fees to remain members of ESN and have to abide by a set of rules.

The national level; mainly represented by the National Board (NB), and is named ESN [country], e.g. ESN Norway. The national level is the link between the sections and the international level, and its board is elected during a National Platform (NP). This leaves the national level in charge of advocacy and national partnerships, as well as the overall administration of the country's sections, and the duty to host the National Assemblies at which they are elected. The National Representative (NR) is a member of the National Board and holds the national level's only vote on international matters, however they are not allowed to vote on statutory matters. The national level abides by rules set by the international level. Any country wishing to join the network must first be approved by the other national organizations of ESN.

International level; mainly represented by the International Board (IB). In addition, the international level consists of several specialized communities, teams and working groups who together with the International Board administers the organization, works on international advocacy, and on development of central tools, strategies, or other necessary tasks. The international level may elect their own members for any other body than the IB. Additionally, they may develop and propose, but has no voting right on statutory changes.

While individuals may join ESN's various levels through different application and voting procedures, new organizations may only join as sections once they have been through a two-year long application procedure as candidates, after which they have been successfully elected. Through this process ESN has what Gulati, Puranam and Tushman would refer to as a closed boundary, where while members can leave freely, they may only join through a longer application process where they have to fulfil certain requirements. Because of this extensive process, it may also be implicitly harder for a member to leave, as it would be more difficult to enter again at a later date (2012). In terms of hierarchy, ESN displays an interesting mix of types. While the organization is clearly divided into international, national and local level, each with their own boards and leaderships suggesting a strong hierarchy from the local up to the international level, the international level has reduced power over its members, and action is commonly done multilaterally throughout the meta-meta-organization rather than unilaterally, and to a large extent controlled by the sections. In addition, they hold little power over who the new members of the organization should be, or the permeability of the network in the form of rules and formal gatekeeping. Still, despite little legal power, the international level holds authority through its strong brand, network and resources in the form of network and expertise which the network relies on. Because of the variable division of authority, the organization can be assumed to have a middle level of stratification and falls somewhere in between the descriptions of a closed community and an extended enterprise as by Gulati et al.'s definitions (2012).

As a meta-organization, ESN provides a brand which every member is supposed to follow, both in terms of name as well as logo and visual identity (E. S. N. AISBL, 2019b). It also provides a set of rules and guidelines to ensure that members follow a set standard of the organization. Along with providing a space for members to bring their own individual members to meet and increase their potential resources, as well as ICT and visual tools, ESN can be considered an interest-based meta-organization, which youth student organizations may join to meet similar organizations and share best practices. Membership is ESN is also exclusive, in the terms that membership in the meta-organization bans members from initiating memberships with other meta-organizations (E. AISBL, 2017; Gulati et al., 2012). In addition, ESN's structure is geographically based, with sections falling under different national organizations based on their geographical space, and the network as a whole being limited to Europe.

3.2.2 ESNreview

The ESNreview was the project name for a larger structural change in the Erasmus Student Network, or ESN, a European-based student organization. The first documented mention of the current structures being unsustainable come from the Long Term Vision report presented at AGM Prague in 2007, which mentions that the existing structure with direct physical representation from sections would become unsustainable if the organization continued to grow, particularly if it were to grow outside of Europe. With annual growth rates of up to 12% (ESN AISBL, 2019), the amount of sections began to cause increased logistical troubles, and the topic was brought up again during the annual Council of National Delegates (CND) in Lodz, Poland, in 2013 (E. AISBL, 2013). The topic kept resurfacing at following internal conferences for several years, and at the Annual General Meeting in Warsaw, Poland in 2016, they made it into the official Action Plan for the new International Board (IB) of 2016-2017. The unsustainable structure was discussed during several conferences that year, and in October of 2016, two consultants were engaged to provide a professional look at the organization's structure and opportunities (E. AISBL, 2019e). The consultant team consisted of two members; one previous member of ESN, and one which had never had anything to do with ESN previously. The external consultants did consultations throughout the year and presented its findings before the Council of National Representatives in Huelva in 2017.

For the rest of the year until AGM Costa Brava in April, the working groups, STF and the board kept working on the SOS. They also held two live chats to discuss the Review with members, as well as having it on the agenda for every official international ESN event.

The following table shows an overview of notable dates and events in the ESNreview processes, as outlined by the information gathered in observations and interviews, as well as the data available from the organization's own Wiki and project timelines. While it can be assumed that every single ESN-hosted event in the period 2016-2019 may have had some aspect of ESNreview on their agenda, many have been omitted, simply to provide a better overview of the dates and events which were of the biggest importance to the network as a whole.

Date	Event	Description
April 2007	AGM Prague	The ESN Long Term Vision Working Group presents a report of structural issues and possible solutions during AGM
December 2013	CND Lodz, Poland	First mentions of structural issues
April 2016	AGM Warsaw, Poland	Working on structure made it into the Action Plan of the newly elected IB
October 2016		Two external consultants were hired to look at the organizations' opportunities and issues
January 2017		Online consultation
February	CNR Huelva	Consultants presented their report (interview, also from the wiki)

2017		
March 2017		Document release (AISBL 2017) of ESNreview final report, implementation strategy and timeline
April 2017	AGM Germany	ESNreview made it into the Action Plan of 2017/2018, to be ready for election one year later, at AGM Costa Brava. A working group, the Structural Task Force, will be created to work on the development and implementation of the Review.
May 2017		Call for Structural Task Force with a 2 year mandate. Got no applications
August 2017		A new STF with a 1 year mandate starts. 4 out of 7 are IB members of 2016/2017
Fall 2017	Regional Platforms	STF tours the Regional Platforms to present the ESNreview to the sections in a 8 hour long full day workshop
December 2017	CND Lausanne	ESNreview was discussed
Spring 2018		STF and IB holds online calls and continues working on SOS. Amends the documents to incorporate outcomes from CND Lausanne
April 2018	AGM Costa Brava	ESNreview was presented for election in accordance to the Action Plan. The Review was not accepted by the Sections.
May 2018		Concept note "ESNreview: A vision for the Future" released
August 2018	STF 2.0	The next generation of STF, called STF 2.0 was appointed and continued to execute consultations at ESN events.
Fall 2018		Brand new Statutes, Standing Orders and Event Policy Paper by the STF was released. The new documents are released with an explanatory text in every chapter.
Fall 2018		The ESNreview website is updated with a "Frequently Asked Questions" page.
October 2018	Regional Platforms	The IB and STF tour the regional platforms. The proposal is briefly mentioned. A new feature, the referendums, is explained to the sections through a roleplay game
April 2019	AGM Thessaloniki	The ESNreview and the logo proposal is accepted at the Annual General Meeting in Thessaloniki, Greece.

Table 1 Overview of the documented most important events of the ESNreview process

While the process of the ESNreview certainly does not stop with its election at AGM Thessaloniki in 2019, due to the time constraints of this thesis the scope has been set to focus solely on the events related to the election, rather than the implementation itself.

3.3 Data triangulation

In order to provide better validity of the data in this thesis, the method of data triangulation will be used. Data triangulation means that different sources of data is being used to provide depth and to cross-check information (Wilson, 2014). In this thesis, documents by ESN, participative observation, and interviews performed by me will be used as grounds to further analyze and discuss the research questions of the thesis.

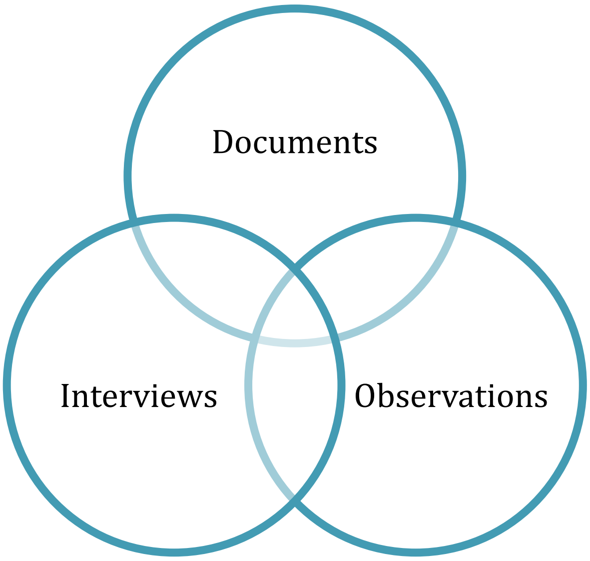

Figure 2. A mix of the collected data sources will be used in order to provide a more wholesome picture of the process(Wilson, 2014)

3.4 Observations

As a part of the organization, I have been able to attend a large number of national and international events during the period which ESNreview has been discussed. As an active observer, I have been allowed to listen and partake in presentations, discussions and workshops where the ESNreview has been a central topic. During the process I have attended a total of 9 events; 8 of which the Review was an official topic on the agenda, and 1 which the topic was not, but was widely discussed amongst the members still. The events are of four different categories:

National Platform (NP), is the biannual assembly of all sections in a country. Here, the NB updates the sections on what happens in the organization at large, conduct trainings, and vote on statutory changes affecting the national level.

Northern European Platform (NEP), is an annual training platform held once a year for all members within the region. ESN is divided into five regions, where NEP is the northernmost one, including the countries of Norway, Sweden, Denmark, Finland, Latvia, Estonia, Russia, and Iceland. There are no elections done during NEPs, however they are central as they often have a higher standard of trainings and presentations than what is feasible on national levels. It is tradition that at least one member of the IB represents at each regional platform. The platform also serves as an arena for consultation and testing of ideas by the international level.

Annual General Meeting (AGM) is the yearly statutory meeting for the whole organization. Here, every section and country bring their representative to vote in person on the statutes of the organization, as well as who will sit in the International Board.

National Boards' Meeting (NBM) is a biannual training and networking platform, where countries may send their members of the national boards. The event also serves as a platform for the international level to present and consult the national level of the network.

During the events I have collected data using written notes. Much of the content for the meetings, such as the digital material and minutes from the official question rounds, are available through ESN's own Wiki (E. S. N. AISBL, 2019b), and will be part of the document analysis.

Time	Name of event	Type of event	Description
Autumn 2017	NEP Tartu	Regional Platform	First formal presentation of ESNreview to sections, in the form of a 8-hour full day workshop
Spring 2018	NP Bergen	National Platform	The ESNreview was shortly presented to the ESN Norway participants
Spring 2018	AGM Costa Brava	Annual General Meeting	ESNreview was voted on along with new logo and several amendments. The Review did not pass
Autumn 2018	NP Molde	National Platform	ESNreview was again presented to the national participants
Autumn 2018	NBM Bratislava	National Boards Meeting	NBs were consulted on the ESNreview
Autumn 2018	NEP Jelgava	Regional Platform	Review was hardly discussed - there were held a roleplay workshop to learn about the newest addition to the Review
Spring 2019	NP ÅS	National Platform	Topic was presented to national volunteers
Spring 2019	AGM Thessaloniki	Annual General Meeting	ESNreview passed

Table 2 ESN events observed where ESNreview has been discussed

The events are presented by the time they were hosted.

3.4.1 NEP Tartu, autumn 2017

The regional platforms of 2017 were held in the autumn, half a year before the AGM in Costa Brava, and were the official presentation of the ESNreview to the sections.

During the Regional Platforms of 2017, the STF 1.0 and the IB were touring the platforms and presenting the upcoming Review in a 8-hour long session consisting of presentations of topics, followed by reflection rounds and small workshops with feedback on the topics discussed. These presentations were supposed to fully inform and prepare the local level to vote on the ESNreview half a year later at AGM Costa Brava, as well as they were a chance for the IB and STF to receive feedback on their current proposal. The regional platforms were structured with all participants being divided into 5-7 person reflection groups lead by an NR, which met at the end of every day to discuss and reflect on the day. The outcome of my reflection group, as well as the talks with other participants later, showed that some participants (including myself) had a very hard time understanding the advanced language and concepts of the 8 hour presentation, and that, rather than feeling listened to through the consultations, they felt like they were pressured into giving their opinion on a very important topic which they didn't have the basis to fully comprehend.

3.4.2 NP Bergen, spring 2018

During NP Bergen, the Norwegian sections were presented with the ESNreview from the current National Representative, whose role it is be the link between the international and the local level, and vice versa. Although the topic was discussed here, the topic was hardly discussed.

3.4.3 AGM Costa Brava 2018

The Annual General Meeting, or AGM for short, is the highest decision-making body of ESN, and is the biggest statutory meeting of the year. Here, between 800-1000 volunteers from the whole network meet in one location to vote on the structural and strategical decisions of the network. With both new logo and structure proposed, AGM Costa Brava was supposed to be a historical benchmark in the organization's history. On the elevated stage in Costa Brava's gymnasium hall, under spotlights and the eyes of nearly 1000 volunteers, the IB proudly presented their proposals, and other countries their counter-proposals. During breaks and social programs, delegates were flocking together with their countrymen to get to know each other and to discuss the logo and the Review. The logo received special attention; the IB had forgone the common procedures stating that all material to be voted on had to be presented weeks in advance, in favor for presenting the logo in a grand reveal during the event. Following the reveal, the organization's informal Facebook group got flooded with "memes" of the new logo. While it can be argued whether or not the reaction was all negative feedback, or humor, the international level responded negatively to the feedback, and decided to postpone the vote on the logo in favor for an opinion poll on whether or not the network wanted the IB to continue its development, despite previous statements that the development of the logo was finished, and it was either this or nothing. However, it wasn't just the logo that made the temperature rise in the plenary room. Question rounds concerning the ESNreview and opposing proposals from some countries went on for hours, extending the time spent in plenaries by several hours. It was crowned by the IB going onstage to remind the network that

Although the logo is not formally part of the ESNreview, it would be naïve to think that the two topics did not nevertheless affect each other.

3.4.4 NP Molde, fall 2018

After the first failure of the ESNreview, the topic was again brought up at the national platform for Norway, this time in Molde. Much like in NP Bergen, most of the participants were again new and had little experience or insight in neither the current structure, nor in the proposal, which was attempted covered in a 30-minute power point presentation by the current NR.

3.4.5 NBM Bratislava, fall 2018

The NBM was filled to the brink with consultations on the Review by the IB to refine the proposal. The event also gave the NBs time to talk in groups and discuss the process. While the IB had presented themselves open to questions, many of the discussions amongst the participants did not necessarily include them, which some pointed out were due to the sensitive relationships between the individuals, and that many saw the IB not simply as a body, but as a group of individuals, colleagues and friends.

3.4.6 NEP Jelgava, fall 2018

The Review was hardly discussed, except from the Referendum, which was introduced as a roleplay session. The referendum was a new part of the proposal by the Swiss network and had originally been part of their counterproposal in 2018. After AGM Costa Brava the IB and the Swiss delegation worked close together to collect their efforts

3.4.7 NP Ås, spring 2019

The Review was presented by a Danish delegate. Members had opportunity to share their thoughts, though it was apparent many did still not understand the concept.

3.4.8 AGM Thessaloniki, spring 2019

The Review was presented by two Spanish delegates in a humoristic presentation, and then by the IB themselves. The president did not take to the stage. A few hours before the voting was spent to do an open space where participants could discuss directly with the STF and IB members

3.5 Interviews

Informants are not all created equal, and the informants you choose, with their experiences, agendas, as well as the chemistry between informant and researcher may very well affect the data one is able to collect from the interviews (Andersen, 2006). However how one decides to meet and use the informants may well be as important as who these informants are. During the data collection I interviewed five individuals. All five had a long-time commitment to ESN, had been or were currently in higher education, and had a role which gave them much insight and personal experience with the ESNreview process. While some of the informants in some circles could be classified as elite informants, all informants were key informants. Interview strategies are often divided into structured and unstructured. While structured usually offers simpler analysis through closed-ended questions, lending itself well to questionnaires and surveys (Leech, 2002), the unstructured interview is often more conversational-styled and lends itself better when performing in-depth interviews (Andersen, 2006), particularly when interviewing educated or otherwise knowledgeable informants (Aberbach & Rockman, 2002). Aberbach and Rockman goes onto present three factors to consider when deciding whether to use open- or close-ended questions:

1. The degree of prior research or expertise I, as a researcher, has on the subject

   Open-ended questions allow for more exploration, but are harder to analyze
2. Response validity

   Open-ended questions let the informants use their own words to describe the subject matter, but makes coding and analysis difficult
3. Receptivity

> Elites and highly educated informants specifically may not enjoy the narrow options of close-ended questions

Following these steps, I opted for a semi-structured interview structure with a conversational format, as is beneficial when studying specific events, institutions, or reforms (Andersen, 2006). This format is well suited when the aim is to further understand how the informant interprets an experience, or their future plans regarding the topic (Aberbach & Rockman, 2002), and is a method to gain authentic insight and knowledge from the informants' first-hand experience (Silverman, 2006).

In order to ensure the anonymity of the informants, their names will be exchanged for a number and their overall position. I have avoided referring to the specific dates the informants were interviewed to reduce identifiability of the data.

Code	Date	Role	Time frame	Type
ESN Alumnus	11.2018	ESN Alumnus	15 minutes	In-person
NB member	11.2018	National Board representative	50 minutes	In-person
STF member	04.2019	STF member	70 minutes	Online call
IB member	04.2019	IB member	80 minutes	In-person
LB member	05.2019	Local Board representative	120 minutes	Online call

Table 3 List of conducted interviews

In the continued analysis, the informants will be referred to by their role.

3.6 Literature analysis

The literature has a supporting function in this analysis and will be used to cross-check and provide additional background to the data found through observations and interviews. Because there is a nearly unsurmountable number of documents available in the organization's own Wiki, the documents will be found and selected based on mentions in interviews or in the observations. The documents are selected on basis of three different reasons:

1. Proposals and official documents: to cross-check observations or interview data

2. Presentations, minutes from official events: to support observations
3. Reports: To provide background information on the topic at hand

All documents used are published on the organization's own Wiki and available for members.

Main pieces of literature:

ESNreview: A vision for the Future

A concept note by the IB of 2017-2019 published in May 2018, one month after the failed election at AGM Costa Brava. The document outlines the different features of the Review and attempts in an easy language to explain its effects on the then current organizational structure.

The ESNreview proposed Statutes and Standing Orders (SOS)

The Statutes and Standing Orders, popularly referred internally as the SOS, are the new legal documents of the organization. The document has two official versions; the proposal from AGM Costa Brava 2018, and the final proposal for AGM Thessaloniki 2019, the latter of which has been approved as the official statutory document of the organization.

Long Term Vision

A document written by the ESN Long Term (LTV) Working Group in 2007. This elusive document, written by a team of nine of then current ESN members, including the IB president of 2007-2008 has been attributed as the first documented evidence of the need for a structural change in ESN. While the full report has been lost, a short version presented at AGM Prague in 2007 still exists and will be used as a resource in this thesis.

AGM Feedback – Analysis results

A report of the feedback form sent out after AGM Costa Brava. The form seeks to analyze the reasons behind the failed election of the ESNreview in 2018. While raw data is unavailable, the report provides an analysis of the data.

ESNreview website

In order to provide more information to the network, ESN International created a website where the ESNreview was presented. This website provided the concepts in short and easy language.

ESNreview Report

Two consultants were in 2017 mobilized by the network to assess the situation in ESN. Their report was presented as background for the ESNreview. Through a consultation period of 6 months, the consultants consulted National Boards, as well as the CND, the IB, the Secretariat, in addition to an online survey with 130 respondents. The report concluded that the network should create several new structures to manage the network, such as regional coordinators to manage the regions, membership committee to work on new members, create a training school to educate its members, and more. Most significantly for the ESNreview was the proposition that the organization should undergo a complete unpacking and change from its current council of representatives, the CNR, to a federal structure.

List of participants

Through cross-referencing the lists of participants for the two events in Excel, it has been found that 222, or 30,1% of the individual participants at AGM Thessaloniki in 2019 were also participating at AGM Costa Brava in 2018.

Minutes and event reports

Minutes and documents from events will be used to support observations and interview data where possible. At the time of writing almost all event reports from observed events are available, with the exception of AGM Thessaloniki 2019.

3.7 Validity and reliability

A limitation of the qualitative methods is that it may be hard to ensure their verifiability, that is, that the same test may be repeated at a later date and receive the same results (Ali & Yusof, 2011). In this thesis, the data has been collected using three different methods; interviews, observations and literature reviews. While diversifying data sources is a way to ensure more data, it also provides opportunities to perform data triangulation; a technique which may be used in an attempt at increasing the validity of the data. This is particularly useful in qualitative studies as this, where there are few informants and where several of the sources of data relies on the epistemology of both the researcher and the informant.

The informants chosen for this thesis were elected based on their different roles, and it has been attempted to collect a wide range of views in order to provide a more comprehensive image of the ESNreview process. Still, the informants were all relatively active on international ESN events which is where I got in contact with them. Considering that the majority of the 15,000 volunteers for the network may never attend an international event, much less have the experience and insight to fill an interview on the ESNreview process, the informants chosen may still be considered to be a special minority of the network. In addition, while several more informants were invited to partake in an interview, it might be that the individuals who agreed to participate hold a different view than those who elected to opt out of participating. One should also not ignore my own bias when selecting and inviting informants, as there may have been important groups of informants missed which could have brought additional and useful insight into the process.

One central data collection method in this thesis has been the qualitative interviews, most of which has been done before a proper theoretical framework was in place. Thus, the interviews have been quite open and explorative, allowing me to further explore aspects of the case which I had not previously experienced or thought to ask, and which in turn reduce the weakness of performing an interview where the questions are filtered through my own understanding of the situation. The filtering cannot be entirely avoided, however. A weakness of the open interview method can be that the information which is provided is bound to be coloured by not only my perspective as the receiver, but also the informant's subjectivity and epistemological viewpoints (Shein & Chen, 2011). Healy and Perry however, argues that while informants are indeed subjective, the data provided does not necessarily have to reduce the reliability and the validity of the study, as long as the study itself is based on factual documentation (Healy & Perry, 2000). In this thesis, the potential subjectivity of the informants, as well as of this researcher as an observer, is attempted alleviated through the process of data triangulation.

It is important to note that while the limited amount of data collected for this analysis may be sufficient to make some assumptions about the case at hand, this alone does not prove its generalizability or ability to be implemented in other cases. This is something which must be tested through further research before any conclusion can be made.

3.8 Consent and GDPR

According to the handbook for Political science and management at the University of Agder, all research involving personal information, that is, information with which one might recognize the informants, need to have official permission from the Norwegian center of political sciences (NSD) to be conducted. This application to collect and store information from February 2019 through December 2019 was sent in March of 2019, and accepted a month later. The application specifically concerned the informants involved in the interviews, and the use of audio recording to temporarily save a voice recording of the interview for transcription. The passive and active observations during events were not applied for, as the participants were deemed to be sufficiently anonymous by the NSD task operator.

Included was an informational letter and a contract which would be sent out to the informants upon requesting an interview. This letter can be found in the Appendix 1 – Invitation letter to interview and consent form.

When invited to partake in the research, informants have received a personal invitation through mail, social media or in person, depending on availability. Along with the invitation has been the information letter and contract as accepted by the NSD. All participants have been given clear signal of when the audio recorder has been turned on and off, and it has been clearly visible during the interview, usually lying on a table or flat surface in front of the participant. Furthermore, the participants have been explicitly informed that the interview process is voluntary and might be ended at their convenience, as well as that the data stored for the research may be deleted upon request without any personal cost to them. The participants have been asked to consent to being recognizable in this research – as some did not feel comfortable having their names explicitly mentioned in this thesis, all participants will instead be identified by their role in the ESNreview process, as well as by a number for the sake of the reader.

3.9 Data storage and retention

In accordance with the data regulation plan of the University of Agder, audio recordings, transcribed interviews and consent forms must be stored in University-issued OneDrive folders (UiA, 2019) which are only accessible to the researcher and, if needed, the mentor for the thesis. Personal information and other sensitive documentation must also be deleted within the deadline of the retainment period set by NSD, which is December 2019. Personal data may elsewise be removed upon request from informants.

4 Analysis

The following chapter will structure and analyze the collected data using Kotter's 8 step model for change. The data will be presented separately in the two temporally based cases; up until and including AGM Costa Brava in 2018, and up until and including AGM Thessaloniki 2019. As the change process is still ongoing, only steps 1-6 of Kotter's model will be analyzed. In addition to this model, some alternative findings will be presented at the end, along with a table to summarize the findings of the chapter.

4.1 Up until AGM Costa Brava 2018

4.1.1 Create a sense of urgency

When starting a change process, the changemaker must first present the problem and move the rest of the organization to accept the reason for change (Kotter, 2008). Before we can formally decide when the ESNreview started and thus when the process to create urgency began, a bit of history must be reviewed. The idea of revising the formal structure of ESN as a whole is not new at all, but can be formally traced back to the Long Term Vision of 2007. The document outlined many of the possible risks and opportunities of the organization (Oplestil, Lostan, Karamonová, & Marinoni, 2007), and would stand as a basis for what was later to be coined the ESNreview. From there on, there is little formal documentation found to provide that the structure was actively worked on or discussed within the network before the topic was again unearthed at CND Lodz, Poland, in 2013. From then on, the topic continued to pop up on the agenda of meetings, and in 2016 the local sections approved for the IB to work on the formal structure as part of their action plan (E. AISBL, 2019e). During this period, the IB at the time hired two external consultants to examine the organization. Their report was presented to the network on April of 2016, along with a plan from the IB on how to answer to the findings of the report (IB member).

> *"Through interviews with the IB, CLR and secretariat, [the consultants] came up with a large-scale change process for ESN [...] Their news shocked the organization, and in the heat of the moment it was decided that ESN would embark on a larger project to improve ESN."*
>
> (IB member)

In other words, the ESNreview may be stated to have started along with the newly elected IB of 2017-2018, whose job it would be to bring about the large structural change the organization had been discussing for a decade (E. AISBL, 2018). While the freshly elected IB had themselves been part of the discussion of the newly named ESNreview for quite some years (IB member), they were all new to the field or organizational change. Thus, as a beginning of their mandate in August 2017, they received a 1,5-hour long training session on the topic to prepare them for the work at hand (IB member). Still, while the topic was continuously discussed on the international level and with the CNR and CND, for most local section members ESNreview was still a largely unknown topic until nearly half a year before the change was supposed to be accepted at AGM Costa Brava. The official presentation of the ESNreview as a nearly finalized concept was presented to the local section members at five regional platforms across Europe in the fall of 2017. Throughout a full day of presentations and consultation, the IB attempted to inform their local members – the ones with voting power in the network – of the dire threats and needs for immediate change (Observations, NEP Oulu 2017). However, while some individuals found these proposals to be an exciting change of pace (LB member, 05.2019), others felt that the presentation and consultation was far outside of their level of expertise, did not recognise the IB's message of the organization's potential demise as true, but rather a manipulative tactic to steer their opinions (NB member; Observations NBM Bratislava 2018; NEP Oulu 2017).

"There's a whole theory about how you need to create urgency about where you need to be […]. We focused a lot on that, and so we were working with fear a lot. And what we learned is that we did it too much because people at some point completely resented it. They said "what are you telling me now? If [the ESNreview] doesn't pass, that the organization is going to fall apart? Is that true?"

(IB member)

Thus in practice, while the ESNreview had been slowly built up for over a decade, for a large part of the organization's members the topic had been partly or entirely unknown for most of this period, as the discussions had stayed on the international and national levels, or discussed with sections in a time when they were still not involved (ESN Alumnus). Due to the nature of most members of the organization as volunteer students, their time within the network is often relatively short, attributing to the organization's rather short organizational memory; a problem which is repeatedly discussed within the organization (Lech & Rutkowska, 2019; Schneider, 2015)(NBM Bratislava, AGM Costa Brava, AGM

Thessaloniki, NP Molde). Considering that only a small handful of members had the chance to go to the national and international events where the ESNreview and its predecessor might be discussed every year, it is not unlikely that many of the members attending the regional platforms of 2017 were hearing about the ESNreview for the first time, although the topic itself had been around for years. As a result, one might consider the regional platforms of 2017 to be the starting point of the process of urgency towards existing members.

"I felt like some kind of rift from that point on, and all throughout the year afterwards, especially since they insisted a lot on that it had been a long process, and that they had been doing consultations for a long time. I have been in ESN for quite some time, at the local level but still. This was the first time I heard such a clear proposal."

(LB member)

However, with little time both to produce the proposal itself as well as to inform and convince local members of the importance and urgency of the change, members did not always understand why the message – to them new – was indeed so urgent.

"We have to change, to move forward. Standing still would mean going backwards. However, does it have to be this radical?"

Minutes, AGM Costa Brava 2018 (E. S. N. AISBL, 2019b)

"There was some urgency that we didn't really understand. [...] I thought "come on, let's do it in baby steps".

(LB member)

The one-sidedness and urgency of the IB did instead make grounds for other discussions beyond the ESNreview itself, such as the role of the IB and the identity of the organization as a whole (Observations; NBM Bratislava; AGM Costa Brava). As many were new to the national and international scene of the organization, they questioned the identity and power of an International Board they had no memory of having elected (LB member; observations NEP Oulu). The feeling that the proposal came too sudden and without the sections being properly involved evolved into a further discussion about the visions of the meta-organization in its entirety.

"It's not what you want ESN to be, to have a hierarchy."

(LB member)

4.1.2 Build a guiding coalition

"One person cannot change an organization on their own"

(Kotter, 2012)

In order to improve the chances of the success of the change process, Kotter argues that a guiding coalition is needed. This coalition should consist of a variety of members with strengths and boundary-spanning abilities (Kotter & Rathgeber, 2006; Williams, 2012). For ESN, the formal coalition was called the Structural Task Force, or STF. This intra-organizational working group of experts on law and the network were, under the careful watch of the IB, in charge of writing and implementing the structural changes required by the ESNreview (E. AISBL, 2019b). Initially, the plan called for 2-year long mandates, however when no applicants could be found, the mandate was reduced to 1 year. In the end, a team of seven were assembled, consisting of four members of the previous IB, as well as three additional members (E. AISBL, 2019b), who under the guidance of the sitting IB were responsible for creating and writing the ESNreview documents. However, as a new concept, the STF did not find their immediate place into the network:

> *"An issue soon arose as some of the old IB members stayed behind as part of the STF. Some saw it as controlling and rumours started spreading of the new IB as "puppets" of the old IB that stayed behind." (IB member)*

Introduced to the network along with the ESNreview during the regional platforms, the STF were met with some of the same scepticism as the proposal and the fears they presented.

> *"Everybody hated them. They were working their asses off, but people just hated them." (IB member)*

Coming from various parts of the network, and many hailing from the previous IB, the STF had a difficult task trying to be boundary-spanners with the local sections. Although the STF were divided amongst the different regions to provide a more personal approach to the members, a particular issue raised was due to the position both the IB and the previous IB-members in the STF held in the minds of the other members.

"People are so open and welcoming to them when them arrive as a stranger, until they get on stage and introduce themselves as the IB. Once that happens, no one dares to talk to them for the rest of the event." (ESN Alumnus)

Kotter points out that the guiding coalition should not only support the making of the change vision, but also be central in communicating and receiving feedback on the process. While the STF were involved in presenting the proposal at ESN events and webinars, their main role was to create and write the ESNreview proposal. Meanwhile, the Council of National Representatives, the CNR, held a central role in the communication process. The CNR consists of the National Representatives, or the NRs, which hold the role of boundary spanners between the international and local levels of ESN and are responsible for informing and consulting the members within their country on the topics of the network. As such, the NRs held a vital position in the process of informing local sections and providing feedback to the STF and IB on the ESNreview process (Observation; NP Bergen; NP Molde; NBM Bratislava).

4.1.3 Form a strategic vision and initiatives

Leading up to AGM Costa Brava, the IB presented not only the Statutes and Standing Orders (SOS) which were the main part of the ESNreview, but also a new vision and mission, along with a new visual identity. Although simply a part of a longer strategy, the SOS received the most attention in terms of discussion time (Observation, AGM Costa Brava). The IB returned to AGM Costa Brava with a presentation called "Let's dream about the future", outlining the main points of the vision; stronger national levels and sections, inclusivity, expanded borders beyond Europe, however they did not bring any formal and easily recognisable vision into the event. Instead, most of the resources of the STF and the IB went into creating the new SOS, which would be presented (STF member). The final proposal of the SOS, a legal document outlining the structure of the organization, was received by the members in advance of the event. However, it was long and for many hard to read and understand.

4.1.4 Enlist a volunteer army

In order to communicate the vision, Kotter calls for support from other stakeholders. Within ESN, the National Representatives, as the boundary spanners between the local and international level, became the natural messengers, presenting the proposal at their National Platforms and offering support along with the STF. As the bridge between the local level with voting power and the proposing IB, the national level, and the National Representative in particular, holds a vital position in the network to ensure that information travels smoothly. Meeting at least 6 times a year, the Council of National Representatives, the CNR, was the natural army to ensure that the message the IB proposed was spread throughout the network. Despite this role, it was vastly different how much information the different countries received from their national level in this process (LB member; NB member; Observation AGM Costa Brava); while some countries provided podcasts in their national language to ensure that the local members understood the Review (Observation; NBM Bratislava), other countries appeared uninformed (LB member; Observation AGM Costa Brava). While some NRs attributed this discrepancy of information to some NRs' willingness to support the change (Observation; NBM Bratislava), others suggested that some NRs may themselves have had troubles understanding the full scope of the Review, much less so disseminating this knowledge in an impartial manner to an even more unknowing network in a manner that would make sense to members with less insight into the political and legal structure and terminology referred to in the documents (Observations, NP Ås, NP Bergen, NEP Oulu, NEP Jelgava). Another pointed out that some countries may lack a culture and structure that fosters discussion of difficult topics like the ESNreview (LB member), while yet another informant points out that due to the friendship between the members of the IB and STF and the Council of National Representatives, it became much harder to be honest and open when discussing and giving feedback on the Review. Instead, they propose that perhaps it was good for the local members, who carry the vote, to not be as closely familiar with them so that they don't get as restrained and biased in their decision making (NB member). This disparity in knowledge became visible when the sections gathered at AGM Costa Brava to vote:

"We were so ready and so informed in [our national] network, and then the difference between levels of knowledge between us and others – the gap between us seemed so large."

(LB member)

This problem also extended on to the local sections, where the language and concepts used in the ESNreview documents were far outside of many individuals' scope of understanding.

"It's really hard to be heard, it's hard to pedagogically explain and bring the material to the section. That is something that every local section member struggle with; what can I bring back and how, and how can I reword it so it makes sense for local active members? It's somehow even harder because it felt more formal and forceful towards the sections, I guess."

(LB member)

The personal ties between some NRs and the IB and STF made it difficult for some to carry the will of their three represented levels at once. While their role demands that they provide their sections with an unbiased view of the processes and to bring the feedback back to the IB and STF, some felt that their task was made more difficult due to the personal nature of the work and the relationship between the IB and STF as changemakers and the CNR as messengers.

"This is so personal for so many of us; we know the people in the IB and STF, and that makes it more difficult, because if anyone is critical and asks critical questions, well, you feel like you can't."

(NB member)

As a result, some NBs opted to call for support of the IB and STF rather than the understanding of the concepts they were building. This position was not well received by the local sections. Much like the IB and the STF had been accused for offering a one-sided presentation of the Review, some countries accused their NRs for the same (LB member; observations NEP Jelgava; AGM Costa Brava). This view was ameliorated by the heavy language of the proposal. With only one side having the competence and expertise to eloquently discuss the topic being able to properly judge the full scope of the proposal on their own, arguments were made of the one-sidedness of the ESNreview process.

"I read the proposal. All of it. It's all just positive points. Do they think it's all good? This is, in the end, not how you convince people you know? They need to get to read all the reports, see all the sides, you know?"

(NB member)

This, along with the urgency of the proposal, gave rise to discussions of the reasoning and legitimacy of the proposal;

"It felt like groundless ambition to set their mark."

(LB member)

4.1.5 Enable action by removing barriers

Kotter points out that one should work to remove barriers that may make implementation of the change difficult. In this he particularly considers problematic individuals. Although individual members don't formally hold a vote in the international ESN structure, their power is still present as representatives and voters on behalf of their sections. However, both local sections and individuals may pose a barrier to the change process, albeit in different ways; while individuals may argue or oppose, sections have the vote to ensure the change process does not happen in the first place (E. AISBL, 2015).

In this process, the IB and STF were contending both with opposing individuals, as well as with opposing sections. Several of these issues does not appear to have been new, but had instead followed for most of the ESNreview process since its presentation at the regional platforms half a year before. Among the issues were the legitimacy of the IB, STF and the process itself, the content of the proposal, and communication of the proposal.

The questions towards the legitimacy around the power use of the IB, the STF and of the ESNreview process in general were first documented amongst section members at the regional platforms of 2017. The lack of trust towards the bodies and the process was a reoccurring topic throughout the entire process, including at AGM Costa Brava itself, this despite the IB's insistence on their positions as elected by the sections (Observations NEP Oulu; NEP Jelgava; AGM Costa Brava). One particular issue seems to have been the lack of a common memory of the events that the IB and STF claimed had taken place, such as the ESNreview consultation by the consultants in 2016, and the continued collaboration the IB and STF had with the CLR. Because those were things which the sections were not directly involved in, it seems this information was either lost in the transition between members of their own section, or the line of communication may have failed to provide them with the information at the time. The IB and STF attempted to alleviate this issue through improved visibility towards the network, appearing on more events and discussing with members. They also regularly visually presented the timeline of the ESNreview, and a website was created to educate the network on the topic (E. AISBL, 2019c). Additionally, consultations were made at every formal event to ensure the voice of the meta-organization was heard through the sections and the CNR.

The content of the ESNreview proposal was itself a topic of much discussion, particularly as it was moving away from a direct vote and representation of the sections and towards an indirect, federal system (E. AISBL, 2017). Several sections and national boards did not agree with parts of the proposal, resulting in a variety of partly or entirely competing proposals which had to be voted upon. The untraditional vote was a point of stress for members, making an already inaccessible and difficult topic even harder to keep straight (NB member).

"It was really scary last year, because we couldn't figure out how [the voting procedure] worked."

(NB member)

In addition, the competing proposals made the situation particularly tense. One informant remembers:

"I didn't really dare to talk to people from the other communities because I was afraid that they would think that I was lobbying for the [opposing] proposal, when I was just curious about their opinions. I really wanted to do that, but I didn't because I was so scared to be misunderstood and all that."

(LB member)

The IB attempted to compromise in the Review documents to make members happy;

"We put in things that we thought would make people happy. That was a mistake. Because if you are going to do a good job then you can't make compromises to make people happy and still be able to explain to people why it's a good decision."

(IB member)

The third issue was the communication of the proposal itself. Being a difficult topic, the IB and STF had a level of expertise which was not present in many other places of the meta-organization (Observation; NBM Bratislava). Being the providers of the information which was then transmitted to the sections by the NRs with a varying degree of success, some members were contending with the opinion that the ESNreview was particularly one-sided, and that they did not have enough knowledge to identify its weaknesses (NB member). Members were also unhappy with the top-down method of communication, and felt that they had not been sufficiently involved or heard in the process (Observation AGM Costa Brava; NEP Jelgava), or that the IB had taken liberties with their power. A particular issue, however, was how closely the IB and the STF were engaged with discussions on the proposal (NB member; LB member; Observations AGM Costa Brava; NBM Bratislava; NEP Jelgava).

Finally, while the IB did attempt to answer some of these issues, knowing in hindsight that the proposal did not pass, their solutions may not have been sufficient to remove all the barriers to change in time for AGM Costa Brava.

4.1.6 Summary of process until AGM Costa Brava 2018

While the ESNreview process had a long history, it has several dates which may be considered the beginning of the ESNreview. Yet, for many members the process started officially at the regional platforms in 2017. With only six months to convince the sections of the need of the structural change, they communicated the message of urgency and incoming crisis as the organization would grow past its structural capacity. Along with the IB and STF, the ESNreview itself became the recipient of much negative feedback, as members of the network failed to identify the message from the IB with their interpretation and experience of the organization. Members were particularly critical to the pressure on expediency of the process, and the lack of consultation of them as sections, however a big issue was also the inaccessible language of the ESNreview proposal itself. Because the IB and STF spent much resources building the proposal itself from the ground up, less time and resources was available for communication and feedback, which was not a focus. While the CNR had a central role in the information flow between international and local level, this had quite varied results from country to country, though it is not clear whether this was due to lack of information and understanding of the Review, skill, willingness to partake, or whether there was a lack of an arena where the NR could sufficiently discuss with the sections. The lack of knowledgeable stakeholders made it further difficult to discuss the process as was necessary, and while many members felt frustrated by the seemingly positive bias to the change in the information received, those who directly contested the ESNreview proposal may not have felt confident to stand up and have an open discussion outside of their countries, further strengthening the silos. In the end, the IB attempted to alleviate the issues related to communication, their legitimacy, and the content of the proposal overall with several changes, however in the end the ESNreview still did not pass at AGM Costa Brava.

4.2 Up until AGM Thessaloniki 2019

4.2.1 Create a sense of urgency

"Something has to be changed, I think we all agree on that. If the result fails, it fails."

(Observation NBM Bratislava)

With 55.04% out of the absolute majority (66.66%) of the votes needed to implement the ESNreview of 2018, the IB, now elected for a second mandate, continued with the process to refine and create the real urgency needed to propose the ESNreview for a second time (E. AISBL, 2019a). Shortly after AGM Costa Brava was finished, the IB released an article called ESNreview: A vision of the future. The concept note outlines the featured of the Review and attempts to further communicate the need for the changes the Review proposes. In the same period however, ESN as a topic became a bit less central in agendas for the local sections (Observation NEP Jelgava), and no eight-hour session was repeated at the regional platforms to explain the Review to new or old members. Following AGM Costa Brava, several of the respondents reported that their feelings about the process began to change. While AGM Costa Brava had been a tough event for many, the lack of actual results and progression frustrated some members:

> *"I think I was eager to go on. It felt like for the past two years with those discussions, it felt like we were standing still. We were waiting for something which didn't happen. It felt like that at AGM Costa Brava, and even more so [now]." (NB member)*

At the same time, another refers to the feeling as maturity (LB member) or fatigue (Observation NBM Bratislava). Nevertheless, the false urgency; the panic and anxiety which had been so apparent before AGM Costa Brava became less apparent.

"We also had more time all through the year to talk to the IB and NRs. Maybe the urgency was still there, but we still had more time to discuss and talk about it than last year. We knew

what we were talking about, really. We got to learn it through explaining it to newbies, and so on." (LB member)

Implicitly, the urgency of the ESNreview was also communicated through the structure of the International Board. Because any person may only be in the IB for two mandates, it was implied that, should the Review fail on the second attempt, that the new board of 2019-2020 may elect to focus their resources elsewhere and giving up on the idea of the ESNreview altogether (Observations; NP Molde, NEP Jelgava, AGM Thessaloniki). Along with the frustration some members felt over the lack of movement in the network, this may have assisted in imposing the vision of urgency on the network, particularly on members which had already previously learned about the Review.

4.2.2 Build a guiding coalition

"We can make the most shiny and best proposal ever, but if we're going to do it in a really aggressive way again, then every aspect people are going to reject it again." (STF member)

A new STF, internally referred to as STF 2.0 was elected into their mandates following AGM Costa Brava, consisting of seven volunteers from the network, none of which were previous IB members. Several of these members had themselves been part of the ESNreview process as local and national observers and participants and had been witness to the frustration and confusion felt by the network. Handpicked by the IB, some of the new STF members were particularly invested in how the proposal was communicated to the sections.

"They tried to be forthcoming with what they thought would be our concerns, and maybe that came off as condescending because they were so set on what they thought was our concern that they weren't open enough to actually listen. This year they were ready, they didn't have to assume anymore." (LB member)

After AGM Costa Brava, a survey was sent out to all participants to further the understanding as to why the proposal failed. While the report received negative feedback for too one-sided and not providing the raw data for independent analysis (Observations, NEP Jelgava, AGM Thessaloniki), the feedback provided a good ground for further analysis and understanding from the STF and the IB on where their previous efforts failed (STF member). Equipped with a more experienced IB and the experiences and knowledge from the previous attempt, as well as a primarily finished written documents and concepts, in the coming year, the STF produced several tools and systems in attempts to alleviate the difficult language of the original proposal, such as improving the Frequently Asked Questions page on the ESNreview homepage (STF member; (E. AISBL, 2019d)), and adding chapter summaries to the proposal (STF member).

"The big difference is that last year they obviously tried to imagine theoretically how to explain and do the proposal, but they didn't have the experience of doing it in practice. This year, the new STF had the real knowledge on how people reacted and what was wrong. Maybe that's also why the old STF felt so condescending last year, because they made some assumptions on how people would react, and they presented and explained accordingly."

4.2.3 Form a strategic vision and initiatives

While the ESNreview did not partake in any large rebranding during this period, the content itself underwent certain changes. One of the major changes were the reformulation of a new vision which, surprisingly, did not gain much attention in the light of the other changes in the network (LB member).

"Maybe we'd talked about it so much that there was nothing new to say about the system. It was time to put it all down and decide what was necessary and what was not necessary. It was a point of maturity of the discussion. It shows from the community this year – we never talked about anything new. It felt less heavy this year, because we had already talked about every possibility." (LB member)

4.2.4 Enlist a volunteer army

"NRs are like the royalty of ESN"

(Observation, NEP Jelgava)

Having already familiarized themselves with the concepts and the art of disserting it to members, some sources suggest that they had an easier job disserting it through the second year (Observations NP Ås, NEP Jelgava). This may have been supported by the local and national members who had already familiarized themselves with the process in the previous year and who could thus present it to others. However, other sources suggest that because everyone had already talked so much about the Review, they had come to a point where they were no longer interested in discussing it, which may have hurt newer members.

"If I hear the proposal one more time, I'll kill myself"

(Observation, NBM Bratislava)

Instead of long presentations, the regional platforms of fall 2018 brought the concept of roleplay as an educational format. Instead of presenting the new concepts of the Review, foreign concepts were introduced and presented through practical tasks and games. This method was quite efficient and received positive feedback amongst the sections. However, the more advanced members were disappointed with the lack of heavy discussion of the Review during the platforms (Observations NEP Jelgava, AGM Thessaloniki, Interview LB member). Nevertheless, the attempts at communicating and making members understand the concepts in full was not lost on the participants;

"What was the most impressive, was the amount of energy people put in pedagogy, to try to break down every theoretical point to make it understood by everyone."

(LB member)

4.2.5 Enable action by removing barriers

Following the process of 2018, there were many changes made to reduce the barriers to the election of the ESNreview at AGM Thessaloniki in 2019. One of these were the collaboration with some previously opposing proposals, which reduced the amount of discussion and made for an easier voting process for participants (E. AISBL, 2019a).

"The opposition and the IB decided to work together. Apparently, a misunderstanding from Krakow had made them oppose each other."

(LB member)

While there were still contesting proposals to the ESNreview presented, they were much less vocal and in opposition than the one which they eventually decided to collaborate with. At the AGM itself, a full hour was reserved before voting for the participants to approach the IB and STF and ask them any additional question they may have about the process. The discussions that came up uncovered many discussions around what the IB and STF replied was basic political or change theories, yet which they explained to the participants (Observation AGM Thessaloniki; Interview IB).

Another change was when the IB decided to let a duo of national members present the Proposal in their stead at the AGM before the voting. In a humorous manner, the delegates presented the points of the proposal based on the reality of their own country, earning some chuckles along the way (Observation, AGM; Interview LB)

4.2.6 Summary of process until AGM Thessaloniki

Much like the process of 2018, the process leading up to AGM Thessaloniki carries several features which closely relate to Kotter's model, and all of Kotter's eight steps can to a bigger or lesser degree be identified from the collected data. While there are several changes between AGM Costa Brava and AGM Thessaloniki, the main difference may be the result. With an absolute majority of the votes, the members had finally accepted the formal changes to the Review.

In the wake of AGM Costa Brava, the IB continued their work on the ESNreview. They recruited the new STF 2.0 with members exclusively from the network and had never been in the IB. With the experiences of the previous process and an already partly written ESNreview proposal, they set out to focus on communicating and consulting the members of the organization through workshops, roleplay sessions and literary and visual support to the ESNreview documents. While the STF in particular focused on creating better material to communicate the Review with sections, the CNR was also more prepared, as the vast majority of NRs had already taken part at AGM Costa Brava either as a section member or as an NR. This retention of knowledge regarding the ESNreview also held true for many of the sections; with the topic being so central throughout AGM Costa Brava, more sections and national levels went into their new mandates with some members who had already heard of and could attempt to explain what the ESNreview was. The normalization from the ESNreview from something new and exciting to just another ongoing process which was harming the organization's progress may have assisted how the proposal was received by new members, as older members became used to, and perhaps also tired of, discussing the process. Finally, the IB and STF managed to alleviate some of the pressure from the year before by talking to and collaborating with some of its strongest opponents from the previous year, making voting easier. However, the indirect deadline of the ESNreview as it was the last mandate of the sitting IB may also have ushered members to lower their standards and accept the Review.

4.3 Alternative explanations

Because of the open and unstructured nature of the data collection process, Kotter was not used as a frame for the interview questions. As a result, the data has provided some other factors which does not explicitly fall within any of Kotter's 8 steps. However, as these factors were still brought up they will still be analyzed here, as they may provide alternative explanations to why the process differ between 2018 and 2019.

4.3.1 Time

Perhaps the most important aspect which were identified throughout the data collection was how the temporal aspect affected the process. While the 6 months between the initial presentation of the Review in 2017 to AGM Costa Brava led many to feel surprised and anxious, the 12 months between AGM Costa Brava and AGM Thessaloniki left the same members frustrated because they felt the organization was at a standstill. Therefore one can assume that the timeline becomes important when considering stakeholders' feelings about the change.

The temporal aspect also seems important for the dissemination of information and maturity of knowledge within the network:

I heard about the result afterwards, at [the regional platform of] 2018, that it felt like people were not ready to vote at AGM in Costa Brava. They were not ready because they hadn't talked enough about it.

(LB member)

One major difference between AGM Costa Brava 2018 and AGM Thessaloniki 2019 was the information of the informants who joined the event. For most local level as well as some national level participants, the months leading up to AGM were the first meeting many of them had with the ESNreview as a concept (Interview 4). With less time to understand, as well as to getting used to discussing the proposal both as individuals as well as organizations, many participants may have showed up to the event without the proper knowledge and readiness to make such a bold decision (Interview 5). A year later however, even despite the rapid turnover and the short organizational memory, the topic had still had more time to mature. For the 30,1% of participants who were returning to AGM Thessaloniki from the year before, they had the maturity of a full year of discussing and considering the proposal from the year before. Yet, even for completely new participants it is likely that some knowledge of the ESNreview may have reached them through the maturity of the topic amongst other members, both in their countries and sections, as well as at the event itself.

"Whatever change we do today is a big change for us, but there's such a big turnover in ESN. In two years there will be a whole new generation of ESNers who'll have no idea what the ESNreview even was. What the old logo was. It'll be the normal to them."

(LB member)

This normalization of ESNreview as a concept which existed within the organization, rather than a foreign concept, was a large change for the process. Even for the 59,9% of the participants at AGM Thessaloniki who had not been to AGM Costa Brava, it is likely that their entry to and knowledge about the ESNreview was provided in a different manner than it was to those who were first introduced to it at the regional platforms in 2017. Rather, they may have heard about it through communication and discussion with fellow members at the same level or within their country. Another aspect of this is the fatigue of discussing the ESNreview. After a year of discussions, infighting and anxiety, it seems some members were frankly fatigued by the process (ESN Alumnus, NB member), or their view was softened by the realization that the Review was not such a serious issue as it was first set out to be (LB member).

"Last year there was a lot of suspense on the Review, and last year the STF and the IB would always talk as if it already had passed, making many people angry instantly. This year people didn't get so angry when they made this assumption. Even before the votes."

(LB member)

Finally, another temporal aspect is tied to the mandates of the IB. The IB who worked on the Review process in 2017-2018 were reelected for 2018-2019, however as ESN only allows IB members a maximum of two years of mandate, this was the last chance for that same IB to work on the ESNreview. Although there were no formal message announcing this, there was a general implicit understanding that if the ESNreview did not pass at its second attempt that it would likely be discontinued by the next IB (Observation NP Ås, NBM Bratislava, NEP Jelgava, AGM Thessaloniki). This fear that it might be the last chance may have affected members' willingness to look past its initial mistakes and accept what had been offered them at the time.

4.3.2 Identification of issue or opportunity

While urgency is much discussed in Kotter's theory, he speaks little of how the first issue of urgency should be identified and the message be created. One of the informants identify lack of previous widespread and well-known consultations as one of the biggest weaknesses of the process in 2018. This not only because the proposal may not answer to the needs of the members, but as much that the members did not trust a message which had not been sourced from them. In the 2019 process the IB and STF attempted to alleviate this by putting more emphasis on how the ESNreview was not a new phenomenon, but an ongoing process, and by adding more opportunities for consultation throughout the year to ensure that members felt heard.

4.3.3 Knowledge and skill of the changemakers

A third aspect is the expertise of the changemakers. While Kotter specifies that education is an important part of the change process, he offers limited input on the knowledge and expertise on the changemakers. As the ones pushing for the change however, it is likely that how the changemakers, in this case the IB and the STF, act, may play a role.

"[...] when we started our mandate, we had 1,5 hour workshop on change management. So we were 5 individuals from completely different backgrounds, embarking on a change management project for an organization as big as [ESN] without any change management background, and we just couldn't afford getting paid professionals to do that."

(IB)

In addition to the maturity of the participants regarding the topic, the changemakers themselves, the IB and the STF in particular, though also their collaborating NRs, improved their skills and awareness of the situation at hand.

"[…]at the end you have to prepare for what are the potential outcomes and how are you going to react to all of them. Because if you don't, you have no idea how to react to them. That was the big mistake of last year."

(STF member)

4.3.4 Identity

The language used and the top-down method of the ESNreview (ESN Alumnus), as well as the perspectives represented made some members question the identity of the organization. While many claims were made, some dubbed it an "identity crisis" within the network (Observation NEP Oulu, NEP Jelgava, NBM Bratislava, Interview NB member; ESN Alumnus), where the proposed perspective of the IB and STF in their messages did not concede with their own.

"If something goes wrong with the Review, the sections will be ok. The sections can survive just fine without the international level. The other way around is not true. The international level has nothing going on if they don't have the local sections. They don't have human resources without them. So if something in the new structure goes wrong, the ones who will pay for it is the international and national level, but I guess it is up to the people who are there."

(LB member)

Rediscovering their freedom as a member of a network, one member reports that they began to see the positive aspects of the Review and started judging the IB and the STF less harshly, because, whether or not their process was legitimate and in line with the will of the sections, in the end it would only reflect badly on them if they failed to support their members. Still, with this newfound freedom in the network, they still felt the unity of the network when the process was finally accepted;

"It felt like a happy ending. I didn't know or care about them during Costa Brava, but knowing that they exist and seeing how happy they were with the result – I felt so happy for them. It was less opposition between people. We were all ESN."

(LB member)

4.3.5 Physical location

"The room was big and cold last year-I guess that also changes the feeling"

(LB member)

Another aspect was the physical location. As was pointed out by one of the informants as well, AGM Costa Brava in 2018 took place in a cold sports hall, on plastic chairs, and with the presenters situated on an elevated stage with a spotlight. It was also located some distance from the hotel where the participants were staying.

During AGM Thessaloniki 2019, the plenary room was held in the ball room of a hotel, which were also where most of the participants were staying. As the room was not as spacious, participants were crammed much closer together to both each other and to the small makeshift stage, raised one step above floor level. There were also no spotlights, but normal lights were used in the room.

4.4 Summary of analysis

As a prescriptive model with clear steps, Kotter's model is intended to be used as a guiding recipe, with one step following the next. In both the 2018 and the 2019 processes there are findings that suggest that Kotter or another similarly prescriptive model has been used as inspiration and guidance during the change process, although this has not been explicitly verified. With the gift of hindsight, one also knows that while the ESNreview did not pass at AGM Costa Brava in 2018, it did so at AGM Thessaloniki in 2019. Based on the most-different method of case study analysis, this leads to four hypotheses:

1. Kotter's steps were not followed correctly at AGM Costa Brava, but were so at AGM Thessaloniki

2. Kotter’s steps were followed correctly at AGM Costa Brava and at AGM Thessaloniki, however Kotter’s model did not adequately cover the necessary aspects of the change in ESN, which change led to the success at AGM Thessaloniki
3. Kotter’s steps were not followed correctly at AGM Costa Brava nor at AGM Thessaloniki, and thus does not explain the success at AGM Thessaloniki
4. Kotter’s steps were followed correctly at AGM Costa Brava, but not at AGM Thessaloniki, thus not explaining the outcome.

While it may seem like an easy task to conclude whether a process has followed Kotter’s steps or not, it is not quite so. As a model that has existed for over two decades and received several iterations by the creator himself, Kotter’s model has several different versions which, while they are all mostly similar, still have some important variations. Most notably perhaps, is the addition to the first step of the model, create a sense of urgency, which was reworked by Kotter in 2008. Here, Kotter reiterates urgency, adding the definitions of false and real urgency to his theory. Therefore, from 2008 and onward, while Kotter would still argue heavily for urgency as a central tool to achieve change, he would also underline that the change process should not be grounded in fear, which leads to false urgency. As such, while a change process may have followed Kotter’s theory perfectly in one version of the model, it still may be considered wrong in his next. Additionally, Kotter’s entire model is by its structure quite wide, and is presented more as guidance than as a cover-all solution for a change process. Thus, there may be aspects which are simply not mentioned in Kotter’s model.

With this in mind, it seems apparent that while the 2018 process attempted to create urgency through fear, as is outlined in Kotter’s early works and supported by others, the 2019 process, either through tactic or chance, is characterized by the want to move on and the frustration that the ESNreview is still there to be dealt with. Thus the 2019 process is more similar to Kotter’s recent take on real urgency, which is based on the desire to reach a goal and to progress.

Further, Kotter advocates for having persons of great formal and informal power within the guiding coalition, in order to communicate to the members of the organization the urgency and importance of the change process. In their first STF, STF 1.0, more than half the coalition consisted of previous IB members, with much knowledge, many contacts, and a high standing within the network as someone who has been in the IB. Yet, adding such powerful members to the coalition – which is not voted on by the sections but are instead selected by the IB exclusively – was not appreciated by the sections and may have hurt the legitimacy of the STF towards the sections. Instead, in 2019 the STF 2.0 were all active members without previous IB experience, yet the backlash received from the organization was much less, which is interesting considering Kotter's initial recommendation. In addition, while STF 1.0 were a new concept working on a process with a large effect on ESN overall, the STF 2.0 were perhaps less scary as the existence of the body itself became normalized into organization culture. While the STF 1.0 were quite busy with the creation of an entirely new structure over the course of less than a year, STF 2.0 started off with many of the documents already made by their predecessors, and while changes had to be made, there would still be more resources freed to focus on consultations, making STF 2.0 more communicative towards the sections than what was seen from STF 1.0.

In terms of strategic vision, the ESNreview did receive some changes. While some members speak highly of the new and improved proposal, it was hardly mentioned during several of the observations, which might suggest that albeit important for the future of the organization, they may not have had as large of an impact on the choice of vote of the members as other aspects on which the members were more vocal. This may again be tied to the difficult language and concepts of the proposal, which many individual members were not experienced with. However, 2019 saw more use of supporting materials, documents, and explanations to documents than 2018, which received positive comments from informants. In 2019 the IB also added an updated vision to the elections – however although this was accepted, it received much less attention than some informants had anticipated (LB member), again suggesting that perhaps there were other aspects than the content alone which made members so accepting.

Kotter does not explicitly mention who or what the volunteer army should look like, other than that it consists of members who, voluntarily, supports and helps communicate the change process. In 2018, this group may have been quite limited to the NRs and some few additional members, whereas in 2019 this group may include the NRs, plus any member who had enough experience and insight into the ESNreview to teach others around them.

Considering the attention this topic got surrounding AGM Costa Brava, it is more likely that there would be more members excluding the NRs themselves who could provide this information in the second year of the process. In addition, the quality of the information provided may have been improved, both due to the supporting materials provided by the IB, STF and other members of the network, but also because the members themselves became more skilled in communicating the issue.

In 2018, the process showed a unignorable number of barriers which the IB had to contend with in the change process. While many of these issues may have been caused by how previous steps had been done, it seems likely that even if it had followed Kotter perfectly, some issues would still have been apparent as can be seen from the effect of the STF 1.0. Although attempts were made to alleviate several of these issues, time constraints on when the ESNreview was to be done and when the IB and STF mandates ended may have been an additional problem for extending the time of the process. On the other hand, 2019 saw many of the same issues lessened through more communication, as well as more time given to the members to consider and reflect on the situation. Both periods use steps similar to those found in Kotter which should suggest that the two processes are separated, as Kotter follows a temporally linear process. However, based on the findings of this analysis they are rather part of one continuous process. Despite the high turnover amongst individual members of ESN as a volunteer student organization, the knowledge of the process and the skill on how to present it continued to accumulate across the network and within the IB and STF. Indeed, there were several findings within the data collection of the process that differed, but which did not naturally fit within Kotter's model. In particular, the temporal aspect seems to be of high importance, as information travels slowly and both members and the IB and STF required time to hone their skills in discussing and improving the Review. However, another aspect that arose was how the ESNreview challenged members' perception of their place and role in the organization, as well as of ESN as a whole. In addition, the physical location of the event, from an elevated stage in a gymnastics hall, to a more intimate ballroom, may have affected the results of the process.

The following table summarizes the most visible aspects of the analysis, based on the two cases.

Aspect	2018	2019
Create a sense of urgency	Urgency through fear Limited knowledge of Review in the organization Knowledge of ESNreview six months before AGM Costa Brava	Frustration, wish to progress Last chance to attempt the ESNreview ESNreview normalized; many know of it from AGM Costa Brava
Build a guiding coalition	Entirely new body Consisted of several previous IB members Focus on writing and building the proposal	STF 2.0 No old IB members in the new STF – some members headhunted from events Focus on communicating and improving current proposal
Form strategic vision and initiatives	Original ESNreview Difficult language, big concepts	Updated and "improved" ESNreview Explanatory support documents A clear vision, outlining the timeline, goal and purpose
Enlist volunteer army	8-hour presentation of ESNreview in detail at regional platforms NRs are in charge of educating their countries internally 2 live chats online	Roleplay at regional platforms, focusing on certain aspects of the Review NRs are in charge of educating their countries internally, with the support of STF and fellow members New proposal includes short version for easier reading
Enable action by removing barriers	Adopted the wishes of opposition Was not prepared to handle the opposing countries Hours of question round onstage IB presented and personally	Did not adopt wishes – focus on producing a linear and complete proposal Collaborated with Switzerland to make amendment and remove a powerful opposing party Open room for 1 hour during AGM to discuss aspects of proposal Proposal was mainly presented by

	defended the proposal onstage	someone not from the IB or the STF
Time	Little time to create proposal Little time for members to understand or contribute to proposal – cause fear and anxiety IB with 1,5 hours of change training Knowledge did not read participants in time Attempted something new Unaware of outcomes	More time to improve proposal More time for members to understand, spread, and discuss proposal – frustrated of stagnation, fatigued with process IB with a year of experience Knowledge had already spread past the CNR to the members ESNreview as old news Work built on experience and feedback from 2018
Physical location	Sports hall Spaceous Chilly Elevated stage Spotlight	Hotel ball room Limited space Warm Low stage Even light throughout the room

Table 4 A summary of the differences identified between 2018 and 2019

Based on this analysis both the 2018 and 2019 process followed some of Kotter's steps, with the 2019 process following some of Kotter's newer reiterations compared to 2018. However, based on the analysis it seems that while Kotter's newer aspects fall more in line with ESN's structure, the temporal aspect is still of major importance for the outcome of this process. Therefore, it seems likely that hypothesis 1; *"Kotter's steps were not followed correctly at AGM Costa Brava, but were so at AGM Thessaloniki",* is most accurate thus far, however one cannot ignore the effects of the alternative aspects that appear in Kotter's blind spots, the potential effects of which will be further discussed in the next chapter.

5 Discussion

This chapter will use the findings of the analysis as well as of the literature analysis in order to return and attempt to answer the research questions featured in this thesis;

"How relevant is Kotter's change theory on organizational change in meta-organizations?"

In order to answer this question, the discussion will first attempt to answer the sub question;

"What made the ESNreview pass in 2019, and not in 2018?"

The results of the previous analysis suggest that either Kotter's model was the defining reason for the different outcomes of 2018 and 2019, or that it wasn't and that alternative explanations are in order. It is nigh impossible to know exactly what the outcome of the ESNreview would have been if anything else about the process had changed. However, through the initial analysis there has already been identified some discrepancies between Kotter's model and the findings in this case. Quite specifically, Kotter's insistence on putting persons of power into the guiding coalition did not prove to be as effective within ESN as Kotter describes. This, however, is only but an example on the larger issue Kotter's change theory faces in the meeting with ESN. As was already explored in chapter *2.5 Meta-Organizations in Kotter's model* there are several aspect which makes meta-organizations different from traditional organizations, and while meta-organizations themselves may be quite different from one another, the implications of the member organizations is a common factor that all meta-organizations must contend with. It is interesting to note that while the exploration of meta-organization versus Kotter in chapter 2.5 was built on the limited theories already existing, many of the issues identified still holds true for ESN. While one could then reassess the steps of Kotter's model once more, it is also possible to boil the topic down to the blind spots of Kotter's model. Most of these were already identified by Appelbaum (2012) and Stouten (2018) as weaknesses to the change theory – however their effect become acute when put into the meta-organizational framework of ESN.

5.1 Power and legitimacy in change processes

The word "power" is often seen negatively in organizational contexts (Tjosvold & Wu, 2009), and although it is dependent on culture, many are adverse to outright discuss power, and would much rather prefer that the world is just (Ferris et al., 1996). Still, most individuals spend their whole lives as part of various hierarchical organizations and systems, be this in work, school, in volunteering, or in society as a whole, many still have an ambivalent relationship with hierarchies and power (Pfeffer, 2009). Lammers and Galinsky defines power as the ability to control resources, both ones own and others', in relationships bound by dependency and interdependency (2009). Power is a natural part of relationships between humans, and exist in any occasion where one person or entity may require something from another (Lawler & Proell, 2009). Dierendoch takes this one step further, in arguing that everyone has something to give in their own ways (Dierendonck, Nujiten, & Heeren, 2009), and that there therefore will always be power dynamics. In organizations, the dynamics of power take place both in interpersonal relations, such as between leader and member or between members within a team, as well as between groups of members (Pfeffer, 2009). Despite the stereotypical aversiveness to power as a concept, Winter thus argues that power is needed in any organization, and that while everyone may have it to some extent, someone must use it more than others, to stake out the course and set goals for the organization (Winter, 2009). Furthermore, the attainment of power is shown to change individuals' perspective of situations as they adopt a more comprehensive view of their new areas of responsibility (Smith & Trope, 2006; Tjosvold & Wisse, 2009) and as boundary spanners towards new stakeholders (Williams, 2002). With their newfound insight, researchers also find that individuals in positions of power are more likely to feel empowered to take action (Galinsky, Gruenfeld, & Magee, 2003) and set goals (Smith & Bargh, 2008), however, in their new perspective that they may also lose their closeness to coworkers on their previous level, leading to a feeling of otherness where one or both sides experiences increasing difficulty in understanding one another's point of view (Vinkenburg, 2014).

The kind of change which can be implemented through the use of Kotter's theory is often considered to be a formal kind of change quite similar to the organization described in Jacobsen's E-strategy (Jacobsen, 2004b). In his theory, Jacobsen divides change processes into predominantly Organizational (O) and Economic (E) strategies. While the O-strategy is seen as a softer process with focus on organizational culture, the E-strategy is harder, incremental, and deals with the formal changes. The O-strategy deals with resistance to change in a "soft" manner. If the stakeholders don't want to change, there is little that can be done about it but continue to communicate the good effects of the change. Meanwhile, the E-strategy, which handles the formal changes, deals with resistance through quite measurable positive and negative incentives. As Kotter's model is closest to the E-strategy, one may expect that the changemakers would deal with resistance to change in quite the same manner. However, in meta-organizations where the members are the one who decides, hard incentives from the changemakers may not only be difficult, but also completely illegitimate for the changemakers to pull off. Rather, they have to make do with the softer responses to resistance, which according to Jacobsen's theory, does not match the kind of change they are actually trying to make happen. Depending on the organization's mission and structure the aspects and traditions which may be accepted in a hierarchy may not be accepted in the members of the meta-organization. What is and is not accepted however may boil down to how both the meta-organization itself and its members interpret and identify their role and relationship within the meta-organization (Sluss & Ashforth, 2008).

As a universal prescriptive model, Kotter is quite general. Still, Kotter as a model for planned change assumes a certain level of agency and the ability to assume a position of power to communicate and cause change within the organization. It is also worth noting that while Kotter's model becomes more participatory through the guiding coalition and the positivity towards stakeholder involvement in latter steps, Kotter's initial step assumes that someone takes the first step and defines the problem or opportunity at hand. Exactly how this should be done is not clearly specified (Kotter & Rathgeber, 2006), however within it there is an assumption that the initial changemaker has enough of an overview and is sufficiently rational to correctly identify not just the incoming problem, but also its cause (Weber & Manning, 2001). In the ESNreview process, the informant from the IB identified that the lack of a big and well-known consultation process was the biggest mistake made in the change process (IB member). In the end it was the member organizations, the sections, which had to approve of the change process to make it happen. This situation then led to two issues. First, the message from the IB may have failed to align with members' own experience of ESN's situation. Jacobsen (2004) states that every individual in an organization will judge the change process based on their own experiences and perspective, which may vary depending on an individual's position and epistemological standpoint (Thagaard, 2013), meanwhile von Knippenberg underlines the importance that members identify with the change message, and that the change message is not a direct threat to organizational identity (Van Knippenberg & Sleebos, 2006). Second, the fact that the IB themselves appeared to have assumed the power and privilege to identify the change message may have challenged the members' perception of the relationship between them and the rest of the organization. Strebel argues that in change processes it becomes particularly important to consider and reaffirm the social contract between members and the organization. That is to say, the informal dynamics and tasks held by the persons in that particular relationship (Strebel, 1996). Within the meta-organization the discussion of social contracts becomes particularly important, as the meta-organization must balance the fine line of assuming power and letting the members be the decision. This matter is further muddled by the varying addressability of varying bodies within the organization (Berkowitz & Bor, 2018). Such are maters which should be clarified in the change process, in order to make the change process as clear and concise as possible for the involved parties. Without the data from consultations to back them up, members of ESN felt that the IB had assumed a position of power of the situation which may not have fit with the members' perception of the relationship between them and the rest of the organization. While change processes are notorious for throwing organizations off-balance (Jacobsen, 2004), this issue opened an unexpected discussion on the role and trust in the national and international levels of the organization were questioned by local members. A particular issue was with the phrasing "down to the local level". While it is a quite common phrasing within the network (Observations; NEP Oulu, NEP Jelgava, AGM Thessaloniki), members felt that their power as vital parts of the network was undermined by their symbolism as being "under" the national and international level. While this may be more accepted in a hierarchy, the existence of power relations in ESN is both a much discussed, yet a rather unexplored topic which may invite further analysis, particularly so as it directly ties in with the legitimacy of the powers if all bodies of the meta-organization, as well as the relations between them.

Miller points out that it is a common issue amongst leaders that they may struggle to find the balance between being too assertive and confident, or too insecure and open to opinions, and calls for what they coin the Goldilocks principle (Miller, 2012), however where this perfect balance is struck may vary based on the legitimacy of the leadership and the culture in which the organization reside. Thus, being able to assess and ensure one's own legitimacy is an important skill as a leader in a change process and may be the defining difference between a successful change process and a revolt (Galinsky et al., 2003). Failing to do so may lead to organizational conflicts (Peterson & Harvey, 2009), which may hurt negativity and identification with the organization. In a geographically divided organization where members also have their own matters to attend to, ensuring that members identify with and feel a desire to partake in the meta-organization can be crucial to contend with members' dual allegiances and split responsibilities and ensure that they justify spending resources on the relationship. However, although commonly viewed as something negative, it is also argued that some level of conflict may be potentially beneficial, as it can lead to more participation, creative and cooperative decision-making processes, and improve implementation efficiency (De Dreu & West, 2001; Peterson & Harvey, 2009; Tjosvold & Wisse, 2009). Whether the conflict has positive or negative consequences however depends on how the conflict itself is handled. If met with a display of power, the situation can easily reduce the members' trust in the changemaker, increasing distance and feeling of otherness within the organization (Peterson & Harvey, 2009; Vinkenburg, 2014), reducing willingness to share opinions, and reduce members' trust. The data of the ESNreview process suggest that one major difference is how conflict was handled in the organization, and that the IB was more experienced and prepared in how they responded to disagreement from members. In addition, they changed their power tactics drastically. French and Raven identify five basis of power tactics; coercive, reward, legitimacy, expertise, referent, and factual (French, Raven, & Cartwright, 1959). These have latter been joined by Rahim additional five steps; affiliation, credibility, ecological, persuasiveness, and prestige power (Rahim, 2009). The ESNreview process saw the use of all of these power tactics in some way. While the IB used coerciveness to spread urgency in 2018, they generally based their assumed power on their legitimacy as the elected board, on their information, and on their affiliation as fellow members of ESN. It is interesting to note that despite every individual's long experience within the network, the IB and STF largely refrained from basing their claims on their expertise as senior members. In addition, while a leader may consider themselves to be using one tactic, or be aware of their tactic overall, their intention may not be shared with the recipient. This becomes particularly clear in ESN through the observations of discussions of the role of the IB. A consensus in these discussions was that most members identify their vital role in ESN as the organization could not exist without members organizations, which again could not exist without individual members. On this basis, members considered the IB to hold the position of servant leadership, where the leadership's main role is to support and foster growth within the organization rather than for themselves (Dierendonck et al., 2009). The IB however have been vocal in their role as serving the mission of the organization, yet also identify their role as the boundary spanners towards external stakeholders on behalf of the meta-organization. Herein is again the issue of unexplained social contracts and addressability. Behfar et al warns against leaders putting themselves in the forefront of these discussions of power, but rather to alleviate the issue through structural groups and boundaries (Behfar, Mannix, Peterson, & Trochim, 2011). ESN has over the years seen an increase in such groups. However, dividing the power to other groups did not entirely alleviate the issues related to power for the guiding coalition.

In his second step, Kotter underlines the importance of the guiding coalition, and claims that one should aim to fill this coalition with powerful characters from the organization to give the change movement legitimacy and underline its call for urgency and priority (Kotter, 2012; Stouten et al., 2018). Within ESN however, the adoption of four previous IB members into the STF did not seem to have aided the movement to the extent which Kotter suggests. While the old IB members were experts in their fields and both knowledgeable and respected across the network, their addition into the guiding coalition was viewed with mistrust, both towards the STF itself, as well as towards the new IB, which members feared would be undermined by their seniors. One possible reason for this reaction may have been that while the IB is representatives elected by the members, the STF is not, but is rather elected directly by the IB themselves. By choosing to include members with so much power without a public vote, the old IB members did not receive the legitimacy their heavy presence required to make members feel like it was a just decision for the IB to make on their own.

Finally, Kotter's model calls for a top-down order of operations. Within ESN as a meta-organization the power relationship between the independent member organizations and the dependent meta-organization makes decision making rather complicated. Theories thus suggest that more care must be taken in bringing in members' involvement to legitimize the IB as changemakers. However in addition, the topic of addressability and member identity ought to be discussed to improve future processes.

5.2 The temporal aspect of change

The analysis of the case study suggests that time is an important factor in how stakeholders react to the change process. Kotter strongly advocates for urgency in his model, and while it is most clearly specified in the first step of the model, it reappears in several subsequent steps throughout the process as well. While Kotter does not explicitly dictate how long time a change process should take, one can assume that he by this urgency would want it to be sooner rather than later. However, some are critical to the focus on urgency, warning that unjust or forceful use of power and urgency may make members cynical (Wanous, Reichers, & Austin, 2000) and anxious (Bordia, Hunt, et al., 2004) if they are not given the opportunity to rationalize the message of change (Munduate & Medina, 2009). While a leader in a traditional organization may attempt to use formal incentives to alleviate some of the negative effects of demonstrating the differences in power between themselves and other members, meta-organizations have severely limited these options due to the autonomy and power of the member organizations. This was reflected in ESN as well, where some members explicitly questioned why the change had to happen so rapidly, creating additional anxiety, as well as opening up a new discussion of the legitimacy of the IB.

5.3 Identity in change processes

While Kotter hardly touches on the topic of identity, other researchers underline the importance of identity and values in change processes (Jacobsen, 2004b; Sluss & Ashforth, 2008; Turner et al., 2008; Van Knippenberg & Hogg, 2004). Knippenberg and Hogg point out that identification is what makes people want to adhere to the norms of the organization (2001), and Turner adds that an a strong identity can unify and empower members to common action and interest (2008). This becomes particularly important in meta-organizations, where members may be primarily preoccupied with their own organizations rather than the matters of the meta-organization. Considering how much time and resources a change process can take (Jacobsen, 2004b), as well as how uncomfortable and unwanted it may present itself for the members of the organization

(Ferris et al., 1996; Stouten et al., 2018), it is central that the members of the meta-organization believe that the change is in their common interest. While this holds true for all organizations to bring individuals on board, it may be even more true for meta-organizations, which rely on the agreement of their members to be allowed to be able to put resources into the process. Jacobsen however points out that it may not be simple to identify and communicate change in a way which is identified as both true and important to all members, because all members operate on the basis of their own information and experience, as well as their interpretation of the data they have available. Within the meta-organizations, different surrounding environment and history may also play a big role. Within ESN most of the local sections are built and grow on their own, and run almost entirely independently from the rest of the meta-organization most of the time. Despite their connection to the same organization, there is little environmental determinism to ensure that every section of ESN ends up with a similar interpretation of their own identity both as a section and of ESN as a whole. This disconnect may have made the change process even more difficult on the changemakers.

5.4 Members in meta-organizations

Finally, I would like to add a point on how members are identified in the meta-organizational theory versus what I found throughout the case study. While this does not directly add up with the context of Kotter's change model, I believe it may still give valid insights into the topic of change in meta-organizations; a topic which lies before us still largely undiscovered. While Ahrne and Brunsson (2005) points out that turnover is not a large problem within meta-organizations, in the case study this was not find to be entirely the case. This is as its core a matter of definitions. As the meta-organizations define the organizations themselves as members, the members may stay for a long time. However, there is a dissonance between the member organizations as holders of formal power of the meta-organizational structure, and the individual members which run the member organizations. While Ahrne and Brunsson points out several features of the organization versus the individual, the ability to think and feel being two of them, it is not explicitly specified how the individuals in the member organizations fit into the puzzle. Based on the findings of this case study, I would argue that this may be an oversight of the meta-organizational theory, as the dual meaning of the word "member" makes it difficult to discern where the member organization ends and where its individual human representatives begin. This dissonance became explicitly clear in the case study of ESN, particularly when considering turnover, organizational memory, and the matter of feeling of urgency. The members of ESN often follow this with some sections having existed for over 30 years, and few sections disbanding prematurely unless the organization dies. Still, knowledge retention is a common issue of the network (interview T, interview A, observations), and one can assume that the knowledge of the network is retained in those who hold positions which are active within the network, or who stays in the network for a long period of time. This may also be suggested by the numbers from the participants of the two AGMs, which show that two thirds of the participating members were the same participants as the previous year. In a network of student volunteers and a relatively high turnover of individual members this is significant, as it suggests that while much focus of the meta-organization is focused on the membership organizations, the individuals representing these organizations may in fact play a large role in learning, experiencing, understanding, and ultimately retaining knowledge on behalf of their organization, thus partially explaining the poor organizational memory found in ESN (E. AISBL, 2018). As Ahrne and Brunsson state, organizations cannot feel. Yet, this does not necessarily mean that the meeting between the meta-organizations and its member organizations are devoid of human emotions or flaws. Indeed, the persons who lead or represent the member organizations both into and behalf of the meta-organizations may have many feelings about the matter – feelings which the meta-organization must take into account in their change process even when they decide to omit human individuals in the definition of who a member of a meta-organization can be. This becomes an issue when considering Kotter's model. Because the idea of a member can't be scaled directly up, nor can it remain a matter of only singular individuals, Kotter's theory in meta-organizations fall into a strange middle ground. While some matters may simply jump a level in the hierarchy, others become a blended mix of where the member organization and the individual human representatives must be the focus for the change process.

5.5 What made the ESNreview pass in 2019, and not in 2018?

Based on the previous analysis and discussion, there seems to be several aspects which affected the success of the ESNreview from 2018 to 2019. While Kotter's steps were central in both versions, neither year used Kotter's steps perfectly by the model, and some of the steps which were not as directly followed led to better results in 2019 than the methods used in 2018, despite those being more in line with the model, as was the case with the guiding coalition particularly. Rather than verifying Kotter's model as a whole, one may discuss the importance of each of Kotter's steps. While some still may have a large importance and Kotter's model overall is a good guiding tool for a change process, the model by itself did not translate well enough into ESN to explain the success of the ESNreview in 2019 on its own. Rather, the model must be seen in combination with other aspects of the change process. The findings suggest that time was the most aspect of this process. With the extra time, the IB managed to improve their weaknesses to the original proposal and became more skilled and experienced in managing change and conflict within the organization. The guiding coalition, the STF, had more resources and information on which to create supporting documents and structures, and the members had more time to consider, reconsider and normalise the idea of change to the organization. That more members had knowledge and experience in discussing the topic also meant that there were more sources of information and opinions on the ESNreview than just the changemakers alone, which may have alleviated some of the fear and mistrust of the Review as an IB project.

While one might argue that the temporal aspect should have been considered into the change process itself, it is important to note that Kotter's model is particularly written with the non-academic practitioner in mind, and is supposed to be a guiding universal tool for any changemaker, however Kotter does not go into detail on what skills may be needed by the various agents in order to make the change process work. This has already previously been identified as one of the weaknesses of Kotter's model, also for traditional organizations (Appelbaum et al., 2012; Stouten et al., 2018).

5.6 Kotter's relevancy for meta-organizations

Finally, one might attempt to respond to the initial research question of this thesis:

"How relevant is Kotter's change model for meta-organizations?"

Based on the findings of this paper, Kotter's change model holds many valuable lessons which may be considered when doing a change process. However, there are also several weaknesses where the theory does not quite translate into the meta-organizational structure, suggesting that while there is certainly potential, there are several discrepancies which makes Kotter's current theory less applicable in the meta-organizations considered in this thesis. This is particularly due to Kotter's insistence on a top-down communication and power use, which reflects rather poorly on meta-organizations, particularly on the one explored in this case study. The power dynamics between the different bodies of the meta-organization, as well as the meta-organization's existential dependency its members may make it difficult to adopt a top-down change process in a meta-organization, because every process must be directly accepted by the members of the organization. Not only does the need for consensus and long structural and geographical distances slow decision making, but it may also affect the feeling of urgency, as member organizations are concerned with their own organizations first. It is also harder for the meta-organization to offer formal or negative incentives to force change, because they often lack this level of autonomy over their members, who remain autonomous and may also leave the meta-organization if disagreement arises. The findings suggest that leaders of meta-organizations may have a difficult time finding the Goldilocks balance as change makers, as they struggle to balance being active and pushing for change, and being open for their members to take control and empower themselves. Herein lies the issue of different views on the leadership, as members of the meta-organization may not have one unified opinion on how power within the organization is or should be divided, and while all sides may agree that the meta-organization should service its members, different perspectives and opinions may be held on whether this should include boundary spanning to external organizations.

However, there are also aspects of Kotter's model which talks directly about the feelings, experiences and understandings of the change process for individual humans. As meta-organizations in theory mainly concerns themselves with members as organizations, this topic becomes rather hard to translate directly, as organizations as structures don't feel. Therefore, in order to follow Kotter's model the individuals of the member organizations must still be kept in mind, which makes it difficult to scale the terminology up from members as individuals in Kotter's model to members as organizations in the meta-organization.

5.6.1 How Kotter's model may be supplemented

In light of these deficiencies to Kotter's model in the meta-organization, the findings suggest that the model's main flaws in this context is its top-down methodology. Therefore, the model could be supplemented in the following ways:

A step zero: The model could include a primary step before the current step 1 to create urgency, focusing on the identification of the problem or opportunity and the drivers for change. The case study suggests that the lack of an extensive consultation process was one of the biggest issues of the process of 2018. Therefore, letting members get to know the process through the consultation and adding members' opinions and perspectives on the diagnosis of the organization's problems may alleviate some of the issues experienced when attempting to communicate urgency.

Additional coalitions: While Kotter suggests that the coalition's size can range from 5 to 50 members, he does not discuss whether one coalition alone is enough. As meta-organizations are both geographically, structurally and culturally divided, more coalitions may be useful to specialise on talking to and consider the needs of different groups of members. In addition, coalitions may be needed at different times and for different purposes along the organization. Therefore, opening up for several coalitions may strengthen Kotter's usability in the meta-organizational framework.

Repetition: An issue with Kotter's model is its temporal linearity. As meta-organizations often make decisions and move slower than traditional organizations due to their extensive decision making process and involvement of member organizations, the various member organizations, who are to make the final decisions, may not all be prepared to go through the same change processes at the same time. Rather, the case of ESN suggests the usefulness of expanding the process into several periods, adding a feedback loop into the process.

Social contracts: While traditional organizations most commonly have their relationships clearly specified through contracts which are assumed in Kotter's theory, meta-organizations are specifically defined as not having such formal bonds. However, this may also result in lack of clarity regarding the division of power within the organization.

Therefore, the primary step of the model ought to clarify the relation between the bodies of the organization.

Sensemaking over urgency: Divided between their own organizations and the meta-organization, members may have quite individual senses of judgement when it comes to the message of urgency relayed by the changemakers. Knowing their agency, member organizations may depending on their relationship and dependency on the meta-organizations not feel inclined to work towards urgency. Rather, the changemakers should be focusing on ensuring that members understand the reasoning behind the change and how it affects them, through sensemaking. This switch in terminology may also make it easier for the changemakers themselves to identify the purpose of this step, as it is not to frighten members into movement, but to give sense to the change so they want it themselves.

5.7 Summary of discussion

To summarise, while Kotter's model may remain useful as a model of inspiration and guidance, it also has aspects which did not support the change process in the studied case, and cannot be considered to have full explanatory power over the success of the ESNreview in 2019 as other alternative aspects also applied, particularly time. Furthermore, Kotter's top-down methodology reflects poorly on the meta-organizational structure. This thesis suggests several changes which may help improve Kotter's model's compatibility with the multi-levelled structure of meta-organizations. However, it is important to note that these findings are based on limited research and literature and is therefore not generalisable, but requires more extensive research.

6 Limitations and further research

Due to the way in which this thesis and its data collection has been conducted, this thesis is not free from some retrospective fallacies in terms of literature analysis and further discussion.

The data collection and its analysis and discussion are all quite limited in scope, and should not be considered generalizable for how relevant Kotter's change model is for meta-organizations. Indeed, all organizations and change processes are different, and the ESNreview in ESN is but one of them. The limited data analysis in terms of people, events and literature also limits the scope of the analysis, as does the fact that there has only been one person collecting and analyzing the data, giving little opportunity to explore different interview methods and perspectives in analysis. In addition, there are several quite different structural paradigms available within the meta-organizational literature, which may lead to other features and different outcomes. Still, it is hoped that the results of this case study may inspire other researchers to further explore the subject of change in this unique and interesting organizational structure. There are many holes yet to fill, yet there is also a vast uncharted land to explore, and hopefully more empirical data will help us uncover much more in the years to come.

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Appendix

Appendix 1 – Invitation letter to interview and consent form

Would you like to participate in the study "Organizational change in meta-organizations; a case study"?

This paper is an invitation for you to participate in a scientific study looking into the way changes are happening in organizations with other organizations as members. This paper will give you some information about the project, as well as what participating means for you.

Purpose

This study is part of a master thesis in political science and management. The aim of the project is to further study, and hopefully gain understanding, of the theories of meta-organizations in practice. Central research questions include:

- Who in the organization may facilitate change?
- How does one facilitate change within the organization?

Who is responsible for the project?

The University of Agder, Norway, is responsible for this project.

Why am I asked to participate?

You are receiving this invitation because you are currently part of or have knowledge about the structure of Erasmus Student Network (ESN), or because you are knowledgeable about meta-structures.

What does participating mean for me?

This study collects information through interviews and observations. We collect personal information such as: name, age, position, nationality, current country of residence (if different from nationality), as well as your views if you so choose to share them with us. Information is collected using written notes and audio recordings.

The information collected may be used for the purpose of this research only, and will not be shared with outside parties. Your information will not be identifiable in the thesis unless you explicitly give us permission to do so.

Participating is optional

It is completely optional to participate in this project. If you do choose to participate, you can withdraw whenever you may wish without stating any specific reason. All information collected on you will then be anonymized. It will not have any negative consequences if you do not want to participate or later on decide to withdraw from the project.

Your privacy – how we store and use your data

We will only be using your data for the purposes described in this paper. Your information will be used in confidentiality and in compliance with Norwegian privacy policy. The only persons who will have access to your data is the student and her mentor working on the thesis.

To store your data as safely as possible, your name and position will be transferred into code during the storing process.

What happens with your data when the project is finished?

The project is planned to end in December 2019. When the project is finished, your data will be deleted from all servers, and notebooks will be shredded.

Your rights

As long as you are identifiable in the data, you have the rights to

- Get access to the personal data which is registered about you
- To correct personal data about you
- To delete personal data about you
- To have a copy of your personal data sent to you
- To file a complaint to the Norwegian privacy agency about the treatment of your data.

What gives us the right to process your data?

We will process your data based on your consent.

On behalf of the University of Agder, the Norwegian center for scientific data (NSD) AS consider the processing of personal information in this project to be in compliance with Norwegian privacy policies.

How can I learn more?

If you have questions regarding this project, or would like to use your rights, contact:

Student: University of Agder, by Ida Marie Norin at ida.m.norin@uia.no

Mentor: University of Agder, by Dag Ingvar Jacobsen at dag.i.jacobsen@uia.no

Data Protection Officer: University of Agder, by Ina Danielsen at personvernombud@uia.no

Norwegian centre for science data AS (NSD) at personverntjenester@nsd.no or by phone to 00 47 55 58 21 17

We hope you would like to join our project!

Best regards,

Project responsible Ida Marie Norin

Dag Ingvar Jacobsen

Declaration of consent

I have received and understood the information given about the project "Organizational change in meta-organizations; a case study", and have been given the chance to ask questions. I concent to:

- ☐ take part in interviews

- ☐ be observed in a group setting

☐ that my data may be published so that I may be recognized (by position)

I consent to having my data processed until the end of the project, at the end of June.

Project participant Date