Reconciling individual and collective forms of courage in organisations: The extreme case of holacratic managerial practices

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Résumé :

Maintaining satisfying work relations in organisations raises a 'relational dilemma' where individuals may feel torn between conforming to corporate culture and prioritising their own identity. Offering a way out of this dilemma, we explore the notion of courage in mundane work activities by combining both organisational and virtue ethics literature. Thanks to an abductive analysis of an holacratic firm, this research identifies three forms of courage in organisations: individual (being authentic, expressing convictions and emotions, taking on responsibilities), collective (reflexivity, slow down decision-making, emotional consideration), and organisational (facilitating structures and processes). These results clarify the definition and expression of courage in organisations and enable us to identify tensions and regulation mechanisms between individual and collective forms of courage.

Mots-clés : Courage, virtue ethics, holacracy, managerial practices, qualitative study

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INTRODUCTION

Maintaining satisfying work relations is becoming a major source of concern in contemporary organisations (Sull *et al*., 2022). The struggle to reconcile one's individual preferences with common goals and a shared identity at work is now a well-documented risk, translating into what we posit as a 'relational dilemma'. On the one hand, in environments that rely on strong identification mechanisms, some may feel pressured to conform to their corporate culture at the expense of their own identity, thus fear losing the connection to their authentic self. Startups and their 'we are family' mentality offers a famous example of such normative injunctions - echoing the 'sectarian' aberration already highlighted by Ouchi (1979) and more recently, in self-managing organisations (Lee & Edmondson, 2017). On the other hand, with the generalisation of practices like remote work and digital nomadism, employees may remain primarily focused on their interests and needs, with the risk of losing sight of collective aspirations and entertaining weak social ties at work. Critical management studies link this second horn of our dilemma with the rise of 'new management ideology' since the 1960s (e.g., Islam & Sferrazzo, 2022), having notably led to 'neo-normative control': 'an emergent approach to managing employees which emphasises "being yourself" through the expression of fun, individuality, and difference' (Fleming & Sturdy, 2009, p.569).

In short, this relational dilemma and the risks it poses highlights two major fears in how one relates to work: the fear of not staying true to oneself and that of being socially atomised. In turn, this gives renewed importance to the question of whether and how the virtue of courage should be cultivated at work, knowing how, since Aristotle's *Nicomachean Ethics*, overcoming one's fears has been identified as an inherent feature of demonstrating courage, including in the workplace (Detert & Bruno, 2017; Harbour & Kisfalvi, 2014). Yet, the extant organisational literature on the topic is still at an infant stage. In particular, there are, to date, no clear distinctions between two types of courage, namely, individual courage and courage demonstrated in groups (Harbour & Kisfalvi, 2014). Most strikingly, the scope of the latter is not defined in a systematic manner: it sometimes refers to the collective, sometimes to the organisation, and other times still, to both. As a result, we do not know, either, how to manage the tensions that are likely to arise between individual and more collective demonstrations of courage (however the latter is understood, Simola, 2016). These shortcomings in the organisational literature lead us to ask the following two questions: **how can collective and individual forms of courage be reconciled in organisations, i.e., which managerial practices can further that goal?**

To tackle these questions, we have conducted an exploratory qualitative study based on a paradigmatic case of a consultancy firm (FLEX) that opted for Holacracy, i.e. a mode of organisation that fosters the empowerment of all employees (Robertson, 2015). This was done with the intent of stressing the purported importance of finding a balance between the individual and collective exercise of courage. Arguably, holacratic organisations exacerbate the potential tensions between these two forms of courage: individuality tends to be reinforced through the decentralisation of authorities (Getz, 2009), while the presence of a charismatic leader and the influence of shared values and purpose reinforce the risk of sectarianism (e.g., Picard & Islam, 2020).

Our case study thus aims to disentangle the different forms of courage at work. To do so, it devotes special attention to how wages are periodically called into question at FLEX, which constitutes a 'management situation' (Arnaud, 2007) calling for individual and/or collective courage to address the relational dilemma exposed above, i.e., a situation where, arguably, staying true to one's personal preferences without neglecting collective interests proves to be tricky. This situation has been studied using a combinatory framework between the aforementioned organisational literature and the virtue ethics literature. In the latter, we have drawn both on the Aristotelian perspective (which defines courage, like other virtues, as an individual disposition to act) and neo-Aristotelian perspective (which is more communitarian). This has allowed us to derive three definitional criteria (i.e., hierarchy of good ends, deliberation and managing one's fears), which we have then used to unpack the different forms of courage identified in the organisational literature (i.e., individual, collective and organisational).

The article will be structured as follows. The first part presents our combinatory theoretical framework of the literature on courage in organisation and in virtue ethics. We will then go over our methodological qualitative design (i.e., presentation of the case studied, the qualitative data collection and the analytical process). Lastly, we will present our empirical findings and conclude with a discussion of our theoretical and managerial contributions.

1. THEORETICAL FRAMEWORK

To answer our research question, we draw both on the literature on courage in organisations and on virtue ethics. As a result of the dilemma presented in the introduction, it seems that acting courageously might require overcoming two extremes that may not be desirable (focused on the individual *vs*. in groups). The first stresses the value of acting courageously as an individual, or even heroically, thus posing a risk of instrumentalising courage for personal

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interest. The second, presents a risk of dilution of the self in the collective, e.g. through indoctrination. The question of what (good) ends may be served by acting courageously therefore seems crucial, an issue widely addressed in the ethical literature, but often not practical enough in their recommendations.

1.1. REVIEW OF THE ORGANISATIONAL LITERATURE

Academic discussion of courage in organisations and in the field of management is still nascent (Harbour & Kisfalvi, 2014; Detert & Bruno, 2017). To date, research has been relatively fragmented, with different approaches and miscellaneous terminologies (i.e., courage, moral courage, managerial courage, professional moral courage, courage in the workplace) (Paniccia *et al.,* 2020). One way of distinguishing between types of courage is to look at it in terms of the levels of analysis considered (Harbour & Kisfalvi, 2014), i.e. individual and in groups. This leads us to identify three forms of courage (i.e., *individual*, *collective*, and *organisational*) while highlighting the shortcomings in this literature in terms of distinguishing them clearly.

1.1.1. Individual courage: the acts vs. actors behind courage

Two main approaches of individual courage can be found in the literature. The first presents courage as a strength of character, a virtue or a disposition (e.g., Peterson & Seligman, 2004; Chun, 2005), as 'the moral traits of character' (Paniccia *et al.*, 2020, p. 548). As in psychology or in philosophy, management studies have adopted a more individual approach (Harbour & Kisfalvi, 2014), focusing on the actor of the courageous act in a rather heroic sense, e.g., when faced with ethical issues (see Kohn, 2015 on whistleblowing). The risk here is to circumscribe the exercise of courage only to heroic situations or strategic decision-making. However, some authors point out that courage can also be observed 'within the everyday, mundane activities of our organisations and institutions...' (Srivastva & Cooperrider, 1998, p. 3), situations that have hitherto remained little studied. This distinction is important because the risk for the individual is not the same as when faced with a moral dilemma (e.g., whistleblowers). In the context of

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more ordinary courage, relational risks appear to be central (Simola *et al.*, 2016) (see 1.1.3 for more). The second approach, which is gaining considerable attention, conceives courage as a behavioural response (action) in various organisational contexts (e.g., Rate & Sternberg, 2007). Here, 'courage is more appropriately expressed in terms of 'act' rather than 'actor' (i.e., defining courage in terms of behaviour rather than personality or character traits)' (Rate & Sternberg, 2007, p. 6). However, this distinction is somewhat questionable. In Aristotle's original writings (to which we will return in more detail later), courage as a virtue must be exercised and made visible through concrete actions (Harris, 1999; Paniccia *et al.,* 2019).

1.1.2. Collective courage: a lack of definition in the organisational literature

Besides this individual form of courage, the organisational literature discusses courage in groups. Yet, as Harbour & Kisfalvi (2014) note, the distinction between the collective and organisational levels of analysis is not clear, as both refer to 'courage as a social construction emerging from everyday activities, discourses, and relationships taking place in organisations' (p. 498). On closer analysis, it would appear that this distinction is nonetheless relevant and that further research, particularly empirical research, is warranted to better disentangle collective and organisational forms of courage (Paniccia *et al.*, 2020). So far, it has been shown that collective courage can be sustained by the narratives shaping collective identity (Quinn & Worline, 2008) and (social) intersubjectivity. Organisations can also implement certain practices or recognise exemplary behaviour in order to support courageous behaviour. For example, managers can take measures within their organisation to enable the courage of other members (subordinates and colleagues) (Harris, 1999).

1.1.3. A lack of theoretical guidelines to operationalise the different forms of courage

All in all, the three forms of courage (i.e. *individual*, *collective* and *organisational*) theorised in the organisational literature (incl. their potential interplays) are not clearly circumscribed. Another blind spot relates to the managerial practices needed to reconcile them, especially due

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to their potentially competing goals. If Harbour and Kisfalvi (2014) recognise the need for organisational and institutional processes and structures to facilitate courageous acts, there is a lack of guidelines on the following three aspects: namely, how to study courage (1) in a multi-level light, (2) from a theoretical and practical point of view, and (3) outside heroic situations or strategic decision-making. Beyond that, the interplays between the different levels also need to be investigated. Studies to date have not adopted a holistic view (Harbour & Kisfalvi, 2014). This offers a fruitful avenue for future research since the practices and structures deployed at the organisational level can enable or impede collective and/or individual courage (Srivastva & Cooperrider, 1998). Further, this would require addressing the tensions that are likely to arise between the different forms of courage, particularly with respect to the goals being pursued, for two reasons. Firstly, when exercising courage in more 'ordinary' situations, it might be tricky to identify 'worthy causes' (Detert & Bruno, 2017, p. 594). Secondly, it may be argued that this poses a fundamental relational risk for the individual, manifesting in two major fears in such situations, which call for confronting oneself with others (i.e., not staying true to oneself and being socially atomised, e.g., Simola *et al*., 2016).

1.2. REVIEW OF THE VIRTUE ETHICS LITERATURE

To overcome the shortcomings identified in the organisational literature - especially the lack of consensual definition, making it difficult to identify the different forms of courage in organisations - we now turn to the ethical literature, in which two views are traditionally contrasted. The first one, going back to Aristotle, posits courage as a virtue of character, that is, an *individual* disposition to act, whereas the second one, defended by neo-Aristotelians like MacIntyre (1994, 2007), tends to be more communitarian, in how it connects the exercise of virtues with the notion of cooperative, *social practices*. In an effort to bring these approaches

closer together, we conclude this section with three *definitional criteria* (*overcoming relational fears, situated deliberation, moral justification based on hierarchy of good ends*). These will be helpful for our case study, that is, to unpack the different forms of courage (*individual*, *collective,* and *organisational*) identified in our review of the organisational literature.

1.2.1. The standard approach: courage as an individual disposition to act for Aristotle

Management and organisational scholars who draw upon virtue ethics to examine courage in the workplace have predominantly turned to the Aristotelian tradition (Paniccia *et al.,* 2020). In his famous *Nicomachean Ethics,* Aristotle defines courage, like the other virtues of character, as an *individual* disposition to act, whereby one aims for the mean between an excess and a deficiency with respect to a particular emotion, namely fear for courage (anger for mildness, honour for magnanimity, etc.) (NE, II.6-9). Being brave may thus be negatively understood as avoiding both cowardice (excess of fear) and recklessness (deficiency of fear). What is particularly interesting in Aristotle's thought is his profoundly human account of virtues: to be brave is not to repress one's fears completely but rather, to experience the right amount of fear and respond to it adequately, based on the situation at hand. In other words, his famous 'doctrine of the mean' applies both to actions and emotions: to be virtuous implies *doing* the right thing – not overreacting, not underreacting – based on *experiencing* the right amount – not too much, not too little – of the specific emotion induced by the situation that one is facing.

A key element in his approach is this *situated* reading of doing and feeling the 'right' thing (i.e., in the right amount or manner). Indeed, there are no 'universal principles' when it comes to applying the virtues of character for Aristotle (NE, II.2, 1104a). Sometimes, demonstrating courage could amount to standing up for what one believes in; other times, it might well be to remain silent, say, for the sake of keeping harmonious relationships. In the same vein, some

fears will seem more or less justified depending on the context and might thus not constitute a morally sound reason for acting upon them. For instance, refusing to speak up about difficulties for fear of losing one's job may be read as a sign of toxic management (e.g., Sull, 2022). It should not be up to the individual to overcome that fear. Rather, organisational reforms should be proposed so as to prevent that fear from being experienced as much as possible.

Courage, as a virtue of character, can thus be viewed as a *practice*, with Aristotle very much insisting on the repetitive dimension that this entails. What he means by that is essentially three things: (1) being brave should translate into courageous *acts*; (2) these acts should not happen 'by accident' but as the result of *a conscious choice*, (3) leading one to *repeat* that action *whenever* the same situation presents itself. In other words, Aristotle closely articulates moral actions with intentions, making reflexivity and deliberation a central piece of his account. To read the situation at hand adequately – understand, to deliberate well over the proper amount of fear to be experienced and how to act upon it for the virtue of courage – Aristotle recommends two further things. First and foremost, proper deliberation requires analysing the situation from a 'third person' perspective[1], leading one to abstract away from their idiosyncrasies when reflecting on the appropriateness of their emotions and intuitions. Secondly, to reach that perspective, a crucial part has to do with eliciting the stakes in the situation at hand or, more precisely, with clarifying the ends that this 'exemplar' brave person would be pursuing by aiming to overcome their legitimate fears[2]. This last point derives directly from Aristotle's

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[1] Aristotle calls this the 'prudent person' perspective (i.e., referring to prudence as practical wisdom or *phronesis*): 'Virtue then, is a state that decides, consisting in a mean, the mean relative to us, which is defined by reference to reason, that is to say, to the reason by reference to which the prudent person would define it. It is a mean between two vices, one of excess and one of deficiency' (NE, II.7, 1107a).

[2] '[W]hoever stands firm against the right things and fears the right things, *for the right end,* in the right way, at the right time, and is correspondingly confident, is the brave person; for the brave person's actions and feelings *accord with what something is worth, and follow what reason prescribes*' (our stressing, NE, II.2, 1115b).

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'telic' or goal-oriented view of ethics: if something is good, it is worth being pursued thus set as an end (*telos*), which encourages moral agents to question what goods they are trying to achieve in a given context, until they are able to elicit a hierarchy of 'good ends' (e.g., earning money is instrumental to taking care of one's family needs) – with *eudaimonia*, a sense of profound satisfaction from acting in accord with the virtues, being the ultimate, quintessentially human good for Aristotle (final end).

1.2.2. Neo-Aristotelianism and its more communitarian approach of virtues

An important shortcoming in Aristotle's approach is its primary focus on the individual level of analysis, thereby not doing justice to more collective aspects of exercising courage. Since Aristotelians define courage as an individual practice – thus acquired through habituation, i.e., by practising it over and over again –, the question of how to collectively foster that virtue in organisations appears warranted however: 'individual actions must also be supported by organisational processes, policies, and norms otherwise there will be limited incentive to pursue […] courage in daily action' (Sekerka *et al*., 2009, p. 575). To better integrate this collective reflection in our analysis, we now turn to neo-Aristotelian virtue ethics, which has hardly been applied to the study of courage in organisations this far (Paniccia *et al.,*2020). We focus our attention on MacIntyre's neo-Aristotelian account of virtues (1994, 2007), which is increasingly mobilised by organisational scholars (Beadle & Moore, 2011; Moore & Grandy, 2017). Our main objective in reviewing his work consists in bringing more communitarianism into the picture, notably to put flesh on the concept of hierarchy of good ends as motivation for action and on the aspiration to deliberate well in fearful situations discussed above.

Three core aspects of MacIntyrean virtue ethics are particularly useful to that end. Firstly, for MacIntyre, *social practices*, defined as '[a]ny coherent and complex form of socially

established cooperative human activity [e.g., farming, architecture, etc.] through which goods internal to that form of activity are realised' (2007, p. 187), constitute the primary locus of virtue exercise. The key notion here is that of 'internal goods', which comes in two parts: through cooperation (i.e., by engaging in a social practice), the members of an organisation should aspire (1) to reach *excellence in the products or services* delivered and (2) to *perfect themselves as practitioners* in that process (MacIntyre, 1994). Acting in accord with the virtues – to be precise, those of courage, justice, and truthfulness – is thus primarily meant to help the pursuit of these internal goods, notably by acting as a counterforce to the 'corrupting power' of 'external goods' (i.e., money, power, and status) (MacIntyre, 2007).

This last notion leads us to our second point of discussion. A 'secondary' locus of virtue exercise for MacIntyre lies in the elaboration of *institutions* that are concerned with the distribution of these external goods as rewards (Beadle & Moore, 2011; Moore & Grandy, 2017). Although MacIntyre grants that the pursuit of internal goods cannot be sustained without such institutional efforts[3], it remains clear that consolidating social practices (and the internal goods attached to them) should take precedence morally, that is, securing external goods should be seen as instrumental in achieving internal goods (not as an end in itself). Moore & Grandy (2017) develop this idea further by bringing the notion of *organisational purpose* into the picture. Based on their interpretation of MacIntyre's work, the core social practices of an organisation should be articulated into a coherent whole – a shared purpose – which, in turn, places limits on what is morally acceptable at the institutional level: 'the virtuous organisation

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[3] 'Institutions are characteristically and necessarily concerned with what I have called external goods. […] [T]hey distribute money, power and status as rewards. Nor could they do otherwise if they are to sustain not only themselves, but also the practices of which they are the bearers. […] For no practices can survive for any length of time unsustained by institutions' (MacIntyre, 2007, p. 194).

would place a limit on the pursuit of external goods so as not to distort the practice by, for example, prioritising organisational profit, reputation or even survival for their own sakes' (Moore & Grandy, 2017, p. 6).

Finally, MacIntyre's conception of virtuous activity allows us to zoom out even further and reflect on the 'goodness' of social practices with respect to their *impact on the public or common good* more generally. In fact, contribution to the common good is often interpreted as a necessary condition for an activity to qualify as a social practice: 'anything that does not promote the public good […] may not be properly regarded as social practice' (von Krogh *et al.,* 2012, p. 666; also see Moore & Grandy, 2017). On that basis, MacIntyre himself has claimed that 'the making of money, whether for oneself or for others, can […] never be a practice' (cited in Wyma, 2015, p. 233), leading him to criticise today's banking system in a correspondence – with his opponent acknowledging that the financial sector currently fails to meet this common good criterion by 'contributing to the gap between haves and have-nots' (Wyma, 2015, p. 241).

1.2.3. Bridging the two views: three definitional criteria

In conclusion, MacIntyrean virtue ethics has the merit of addressing more directly two points that are only touched upon in the standard Aristotelian approach of courage: one, it invites a deeper reflection on how to collectively foster the exercise of that virtue, through adequate organisational practices and processes; two, it helps to flesh out the hierarchy of good ends behind the situation at hand (i.e., by stressing how individual goals should be assessed in connection with standards of excellence as well as the likely effects on the organisational purpose and common good more generally), thus facilitates the deliberation over the 'right' amount of fear to be experienced and appropriate response. At the same time, by addressing

'too well' the main shortcoming in Aristotle's approach (i.e., its individual-centric character), MacIntyre's communitarian account runs into the opposite problem: it puts the question of moral agency in the background, that is, it does not cover the specifics of acting with courage. Therefore, we wish to end our literature review with an effort to bring these two traditions closer together, leading us to retain three definitional criteria that incorporate both individual and communitarian elements. We claim that demonstrating courage in organisations implies: (1) *overcoming one's relational fears* through (2) *deliberating* over the appropriateness of these fears and adequate response based on a morally justified (3) *hierarchy of good ends*. With respect to (1), it is worth clarifying that we highlight the relational nature of these fears - having to do with the relational dilemma exposed above - as a fundamental feature for a definition of courage in more 'ordinary' situations (e.g. Srivastva & Cooperrider, 1998). Equipped with these proposed building-blocks for a situated approach that is morally informed, we suggest turning to a case-study to see how these criteria should allow the members of an organisation to better decipher concrete situations calling for individual and/or collective acts of courage, thereby casting light on the managerial devices and practices that can foster the exercise of that virtue.

2. METHODOLOGICAL DESIGN

2.1. EMPIRICAL CONTEXT

To investigate the notion of courage at work, we have opted for a single case study (Yin, 2014). This methodological design allows us to focus on the context of one self-managing organisation and to have an in-depth analysis of the team activities and work organisation.

Our case study is a French management consulting firm, that we will call "FLEX", founded seven years ago by three associates, one of whom still works in the company and is considered as the "founder". The company currently has 14 employees, and their managerial practices are inspired by the holacratic model (Robertson, 2015; Bernstein et al., 2016), which can be considered as a paradigmatic form of self-management organisation (Lee & Edmondson, 2017). Accordingly, the managerial responsibilities are shared and each employee is free to volunteer for one role or to propose new ones if needed. As one of our interviewees says: "*we don't have managers, but we do have managerial roles that are distributed, sometimes rotating, sometimes distributed. So, yes, some of these roles require courage*" (DL). Their working routines include different types of meetings with specific purposes and processes as proposed by the Holacratic model[4], included also numerous informal moments which are considered crucial for their organisation. For example, wage development is collectively discussed every year in order to impose transparency and the process is composed of two different meetings with several weeks of reflexivity between the two to encourage informal exchanges between employees and enable collective regulation (see Box 1 in the results section). Holacratic organisations are an interesting case study as they exacerbate the potential tensions between individual and collective courage. Indeed, individuality tends to be reinforced through empowerment, while the presence of shared values and purpose reinforce the risk of indoctrination.

2.2. Data collection

To collect data on the practices in place and our interviewees' reflexivity about them, we opted for a qualitative methodology based on three sources of data.

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[4] "Holacracy is a complete and practical system for achieving agility in all aspects of organizational leadership and management and includes concrete processes and practices that fully embody agile values and principles." (Robertson, 2006, p. 19)

Firstly, we conducted 15 hours of observations on the company's site to attend business events, 'governance meetings' where the internal functioning of the team is discussed, as well as weekly 'rituals' aimed at developing team spirit and identifying potential points of tension (see table 1 and table 2 below). These observations allowed us to identify practices that we were then able to discuss during the interviews. Two researchers were involved in this process and field notes were taken independently.

Table 1. Details of observations made in the investigated organisation

Type of observation	Date and duration
Open conference about empowering companies	01/24/23 - 3h
Operational meeting (weekly ritual)	02/06/23 - 2h
Operational meeting (weekly ritual)	02/13/23 - 2h
Operational meeting (weekly ritual)	02/20/23 - 2h
Workload planning meeting	02/21/23 - 2h
Co-development session (about client management)	03/02/23 - 2h

Secondly, fourteen semi-structured interviews were conducted with all the members of the team. The open-ended guide was designed for different purposes: 1) to better understand the work organisation and distribution of responsibilities within each team; 2) to identify contextualised situations and discuss the perception of courageous or non-courageous practices; on the basis of these examples, we then asked interviewees about 3) their definition of courage in a professional context, and finally, about 4) the collective and organisational arrangements likely to facilitate or impede the adoption of such courageous behaviours. The interviews also allowed us to discuss the practices identified during the observations and we were thus able to describe the practices in place, the actors' intentions and the interpretations of the other actors involved. All the interviews were fully recorded and transcribed.

Table 2. Details of the 14 interviews conducted

Interviewees (anonymised)	Current position in the company	Date and duration of the interviews (minutes)
MBe	Facilitator and business developer	03/22/23 - 52'
DL	Facilitator and office leader	03/22/23 - 42'
SM	Facilitator	02/27/23 - 62'
MM	Facilitator	02/20/23 - 70'
VM	Digital marketing	03/02/23 - 38'
LM	Facilitator	03/02/23 - 68'
JB	Founder	03/02/23 - 59'
GJ	Facilitator	03/01/23 - 58'
ASR	Facilitator	03/01/23 - 63'
CLQ	Coworking manager	03/08/23 - 36'
MP	Facilitator	03/02/23 - 54'
CdP	Facilitator	03/02/23 - 75'
EB	Facilitator	02/14/23 - 62'
JdM	Facilitator and office leader	02/02/23 - 58'

Finally, we used secondary data gathered from the company such as white papers on their internal processes for onboarding, compensation procedures, etc., and the material support for their meetings. These documents enabled us to include in our analysis the material dimension of the meetings, thereby allowing us to better understand how that company implements flexibility in its work organisation (as many of its workers regularly attend meetings remotely). The meeting supports were often used to facilitate discussions during the meeting and completed in real time, which makes them an essential part of FLEX's work organisation.

2.3. DATA ANALYSIS

The data analysis is based on the practice (Nicolini, 2012) and situational perspective (Girin, 1990; Arnaud, 2007; Raulet-Croset, 2008), which offers an analytical grid to analyse the mundane activities an avenue for future research pinpointed by Paniccia *et al.* (2020).

We started to inductively analyse our field notes and interviews. From the different organisational situations captured, we relied on a content analysis approach (Gioia *et al.,* 2013; Miles & Huberman, 1994) to identify the dimensions along which courage may be defined, as illustrated in the figure below. Then, in order to make an example of it, we use a management situation to describe how the dimensions of courage could be in tension and articulate to each other. According to Girin (1990) and Raulet-Croset (2008), a management situation brings together participants who must carry out a collective action within a given timeframe, leading to a result. In our case, we refer to a process of collective self-determination of salaries within the Flex company. This situation enables individuals to collectively discuss the added value they bring to the company and to incorporate this into their salaries. The process is then well fitted when talking about courage in organisation.

Figure 1. Data structure
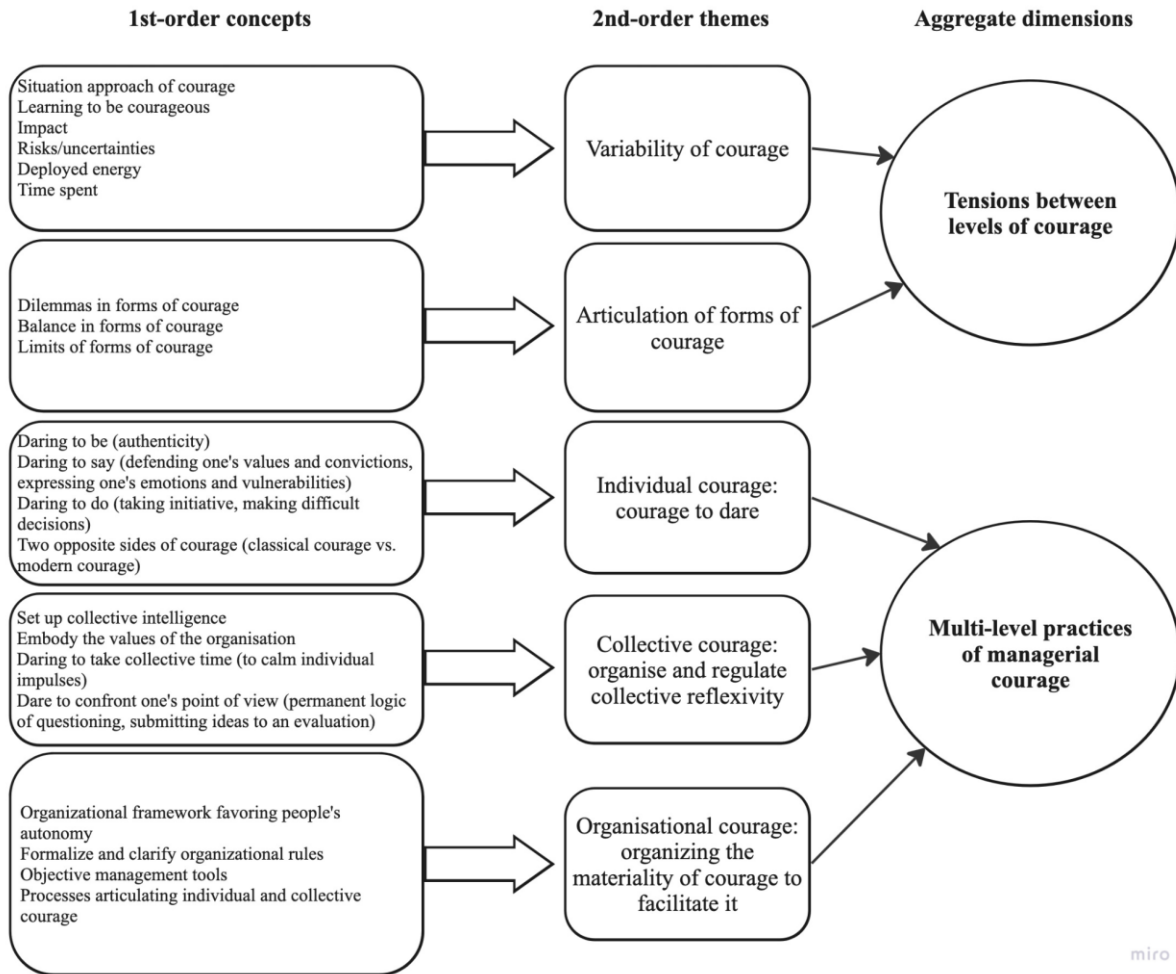
3. RESULTS

3.1. A PRELIMINARY RESULT ABOUT THE NATURE OF MANAGERIAL COURAGE IN LIBERATED COMPANIES

The first surprising result of this research was the interviewees' unease about the word 'courage'. As a matter of fact, the notion of courage is often seen in two ways by interviews. The first refers to what we can call **classical or heroic courage**. This understanding of courage is perceived as '*tribal*' (JB), or '*manly and conqueror*' (LM). This classical view of courage echoes the idea of a '*strong*' individual, or a group of people who are '*risk-takers*'. In a

managerial perspective, it refers to a manager who '*wants to be strong, has to take decisions that have to be assertive, has to stay the course*'. Courage is then the prerogative of the manager, the person who '*controls, constructs indicators, monitors people, thinks about their development, their training, schedules, holidays, and so on*' (DL). However, this way of considering managers and management '*is considered to be somewhat outdated and associated with traditional organisations*' (CdP). Seeing such classical courage as a virtue *'is not necessarily the right element'* (LM).

This is why our respondents conceive of another form of courage that some call '*weak*' (JB). This second meaning of courage is considered to be a **modern one** and fits well with today's organisations that seek to empower people. Courage becomes the ability to bring '*transformation and subsidiarity into the workplace*' (CdP). Management is not anymore about '*taking decisions and being strong, but rather to empower, to listen to those who need it and to help them*' (CdP). So, alongside classical courage, there is a more 'humble' or 'unspoken' form of courage - *a modern one* - which is practised in the day-to-day routine of work. In self-managing organisations, our results show that modern courage is distributed within the organisation at individual, collective and organisation levels.

3.2. A MULTI-LEVEL PERSPECTIVE OF COURAGE PRACTICES IN ORGANISATIONS

Individual courage - the individual side of courage is linked first and foremost to **authenticity**. Workers value '**daring to be**': for them, it takes courage to be authentic and take off one's 'professional mask'. Such a dynamic increases learning capacity, both for the individual and the group. '*By trying to be whole, people bring all their expertise and humanity into the workplace*' (GJ) and are able to **embody and defend personal values**.

Authentic means not wearing a mask. It means I'm the same person at home, the same person with my friends, the same person at work. It means not trying to put on a show. Not trying to act differently because I feel I'm expected to behave in a certain way. Of course, in these different situations, I'm not exactly the same person, but I can express my emotions, I can express my doubts, I can express my joys, and I can have weaknesses and strengths too... (DL)

As one interviewee puts it, courage is '*too subjective while authenticity is clearer and perhaps easier to theorise*' (CdP). But the relationship between authenticity and courage would seem to work both ways at FLEX: if, as we have seen, it takes courage to be authentic (*daring to be*), at the same time, it is by expressing their authenticity that individuals, in their managerial roles, will be able to demonstrate courage by **daring to say and daring to do**. Daring is indeed unanimously presented as a core dimension when interviewees are asked to define courage.

Earlier I said a lot about daring to do, daring to say. But after that it's mainly about daring to do things, daring to say things one to one to someone. There's quite a strong feedback culture at FLEX, and feedback even when it's not asked for. I've been at a presentation and then the next day, with someone from FLEX, got a call saying "Yes, I wanted to give you some feedback on your presentation yesterday". But I didn't ask for anything! (MP)

According to our interviewees, daring comes up in many everyday and ordinary work situations such as dealing with difficult clients, terminating a contract, working in pairs etc. As we pointed out, daring also has several dimensions. **Daring to say** is about speaking the truth and defending one's point of view, even when it is in the minority, while **daring to do** is about deciding and/or taking the initiative to open a hot topic. In extreme cases, daring is about expressing one's **vulnerabilities**. Many interviewees see vulnerability as a specific form of courage visible in

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liberated companies. People dare '*to express their doubts, their moments of vulnerability, when they're not at their best, when they don't feel legitimate*' (MP), and clearly move away from a heroic understanding of courage. More broadly, individual managerial courage refers to **taking harsh decisions.** As one interviewee said, '*courage also means not buying social peace*' (JdM).

Collective courage – Collective courage is widely assimilated to the capacity of a work group to implement the favourable conditions of **collective intelligence**. Classically, the aim of collective intelligence is to overcome individual cognitive limits and to organise a collective reflexivity. In other words, the group seeks to go beyond everyone's '*blunders and failings*', as well as embodying organisational values.

> *My perception is that the path is as important as the result, above all because that's what we do, and what we tell our customers a lot. And so, if we don't apply it to ourselves. I find it incoherent. And then we can't control everything. We're all clumsy, we all have our failings. But precisely, I find that collective intelligence allows us to make decisions where we are stronger than a single brain and we go beyond our individual limits. (CdP)*

This quest for collective intelligence is based on three main levers. The first one refers to a **permanent questioning logic**. People dare to confront their point of views and dare to submit to the assessment of others, whether colleagues or people from outside the company (like researchers). In self-managing organisations, '*organisational rules are co-constructed and anyone can challenge the rules*' (DL). This permanent questioning logic is therefore one of the driving forces behind the evolution and adaptation of the organisation. For example, an organisational process can be questioned at any time. One of our interviewees referring to the undermining of a process of collective self-determination of salaries recalls her strong emotion.

> *It's a courageous act because I think it's been a long process to build up, it's taken a lot of energy from some people... It was "itchy" to realise that in fact our process isn't*

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perfect. It was a very moving session, I remember, because the project group had really worked on it and the fact of saying to ourselves that it doesn't really fit any more, that took courage. It could affect people who had put a lot of time and effort into it, who had thought about the system. (MM)

This questioning logic also requires specific skills such as learning to compare your own views with those of others and, above all, learning to let go of initial opinions that people may have on a particular subject. In a collective context, showing courage is '*about being able to let go and "get out" of your own idea*' (CdP).

The second lever of collective intelligence lies on a **temporal dimension.** Speaking of courage, the collective level acts as a buffer for individual bursts of courage. Many interviewees express frustration when a decision is taken too quickly, or mention the need to capitalise on collective mistakes, particularly when a decision has been the subject of strong collective emotion.

> *There have been times when decisions have been taken too quickly and the collaborative approach has been somewhat rushed. And I didn't dare say that it made me angry and frustrated. (MBe)*

Collective decisions need time to mature, so collective courage is about daring to take collective time in order to calm down individual impulses. '*Sometimes you must wait, you have to take time, […] you have to have informal discussions before you can work collectively*' (CdP),

Finally, the third lever of collective intelligence is about taking care of other people's emotions**.** As a corollary of authenticity, self-managing structures '*give large space to affect and emotion*' (MP). Consequently, our interviewees reveal the emotional side of decision-making. They freely spoke of the 'brutality' (MM) of certain decisions, such as dismissals or activity closure, and their lack of legitimacy or lack of perceived competence when it comes to managerial practices. As a consequence, individuals set up specific mechanisms to take care of relationships, even when it comes to terminating a contract and to separate from someone.

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I think it was brutal. I don't know if she's holding a grudge, I've got her on the phone tomorrow. It happened on Friday, she's on holiday now otherwise I'd have called her straight back but on Friday ... she wrote me a text message and she didn't want to discuss it any further you see. So I think she needs time to settle down and all that. But on Wednesday we've got real Buddy⁵ time and you see I think Buddy's role is going to be really important in offboarding too. I'm really keen to know how to provide good support? I really want to support her and work with her to organise her offboarding. (MM)

Organisational courage – The organisational level of courage is paradoxical because its main objective is to facilitate courage at individual and collective levels but, at the same time, as one of our interviewees suggests, individuals might 'need less courage':

*It's going to take courage if I see a risk of putting myself in danger, of being seen in a bad light […]. At FLEX, we have much more room for error. We're used to sharing our point of view. It's rewarding to be able to express yourself. There are spaces to do that. I think a certain number of us try to be good listeners, particularly [the founder]and myself. Here are some people who might sometimes be seen to be in a position of authority in certain respects, **but I think it takes less courage to disagree than in other companies**. (DL)*

Consequently, organisational courage is first an organisational framework that supports individual autonomy. The company we investigated operates in shared governance and, by doing so, gives individuals considerable autonomy in organising their tasks and gives a great deal of responsibility to work teams by distributing managerial roles. Such organisations push

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⁵ A buddy is a special role institutionalised in the organisation of FLEX. The buddy acts as a kind of guardian angel, and plays a fundamental role in the integration and skills development of new arrivals.

workers '*to request high standards in human relations*' (GJ). Individuals must '*say things, take a stand, hold a position, have an opinion […] even if that may be tricky*' (GJ). In other words, participative organisations facilitate courageous actions and/or make situations that would require one to demonstrate courage less frequent by focusing on people and relations and training people to express their point of view. For our interviewees, this empowering organisational framework is even apparent at a cultural level.

> *I felt it even before I was recruited. I knew about FLEX before I applied and that's what attracted me. It was this strong collective, i.e. seeing that it's actually strong because it's in shared governance and that the people who are there, they're there, they want to be there, they want to work together and that as a result, the quality of the relationships is quite high. And so, yes, that's something that comes through, I think, in FLEX. (GJ)*

Moreover, organisational courage has a material inscription in order to '*involve people in the decision-making process'* and to meet a strong need for regulation and/or self-regulation (JB). Organisational courage takes the form of clear and formal rules designed to process the life of the company. As one of our interviewees says: '*if we clarify what the criteria are, if we clarify the rules of the game, then in fact you have far fewer tensions emerging and therefore less need for courage to deal with these tensions*' (DL). The benefits of clarifying the rules can be seen in the day-to-day running of the organisation, like for a collective planning of a workload or for tracking travel expenses.

> *For example, I'll take the example of the workload plan of a person who has 11 days and another who has two days. If the rule is to all aim for seven or eight days, we use this rule to simply say ... And you probably won't even need to say it! You see, if we monitor the number of journeys each person has made a little more, so that everyone can regulate themselves, when one person has 30 planned workdays and the other has*

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zero, then the person with zero will regulate himself, in fact. You don't even need to manage tensions anymore. (DL)

This need for clarification also extends to the formal process and management tools used in the company. These are generally designed collectively to facilitate the free and sincere expression or to pick up weak signals about latent tensions. For instance, the company we investigated set up a process to define wages collectively, spread over several rounds of negotiation, and which has been the object of a specific management tool. The following quote explains this idea.

> *The idea of the second round is to write down everyone's final position. We'll visualise it together. There could be a veto if someone feels that the positioning of someone endangers the organisation. We can express a veto at a given moment. And we'll visualise the implications collectively. We call it a sandbox. It's a file where we have all the budget forecasts, sales, dependencies, etc., and we see what a bonus, an individual increase, etc. does. And how does that affect the result at the end of the year? So it's going to help freeze this decision-making, both individual and collective. (ASR)*

In the same vein, the company institutionalised a role of '*buddy*' for newcomers in the organisation. A buddy is '*a special role, which is to act as a kind of guardian angel, playing a fundamental role in the integration and skills development of new arrivals*' (GJ). The buddy allows to play a '*mirror effect*'. The buddy '*confronts their point of view […], confronts their reality with someone else's*" (JB). In other words, these management tools have a common objective: enabling individuals to gain a sense of perspective, while at the same time enabling them to objectively assess the impact of their decisions on the organisation.

3.3. TENSIONS AND ARTICULATION OF LEVELS OF COURAGE: ANALYSIS OF THE SALARY INCREASE SITUATION AT FLEX

Highlighting a multi-level approach to courage (individual, collective and organisational) leaves us with two unanswered questions. First, when do these different levels of courage emerge? And secondly, how do they interact with each other? This section will allow us to provide answers.

One of the striking facts about our interviewees is how they describe courage as a relative concept. This **variability of courage** is firstly explained by the **performer of the courageous** act:

> '*Courage is very relative to the person because what will be courageous for you won't be for me, because we won't have the same fears.*' (CdP).

Additionally, the capacity of an individual or a group to be courageous varies according to the situation and over time. A first explanation is based on the ability of actors to learn to be courageous. To be expressed, courage needs either '*experience*' (MQ), practice, like a muscle (MM), or time dedicated to learning from previous mistakes (MBe).

Secondly, it depends on the **context of courage expression** captured by different variables mentioned by the interviewees: perceived impact of courageous action, time spent, energy deployed, perceived degree of uncertainty. Depending on the perceived weight of these variables in a given situation, courage could be daring to say or daring to stay quiet, daring to act or daring to stay passive. The following quote also clearly indicates the relative dimension of courage.

> *It happens to me to give up saying things, when I see that someone who has made a decision or who has done something vis-à-vis someone else, to let it happen because I believe that it is not for X or Y reasons, either because I did not have the courage **or because it requires too much effort precisely to be courageous for a result that I do not necessarily find very impactful**. (GJ)*

These two criteria – performer and context - prompt us to adopt a **situational approach of courage**. To do so, we chose to analyse a very specific situation within an organisation: salary increase. This situation is a relevant exemplification of how individual, collective and organisational levels of courage come into tensions and articulate with each other, for three reasons.

Firstly, the salary increase situation involves an organisational device (at Flex, salary rises are organised through a specific process - see box n°1) and forces individuals to express in front of the collective a specific position towards their relationship with money and salary (a subject often presented as taboo French society strongly tinged with egalitarianism). Consequently, salary increase situations lead people to talk about personal and ethical issues, their "added value" in the group and how fairness and merits may be taken into account in the organisation. Put differently, when it comes to talking collectively about pay rises in the Flex workplace, we are in fact talking about a taboo that has repercussions at both individual, collective and organisational levels. The following is expressing that money issues are actually ethical.

> *Knowing that it* [money issue] *is going to be emotional because we're human and money is taboo subject, which crystallises a lot of complex things ... I don't know, when you were growing up, were you given everything? Did you get enough recognition? How, in spite of everything, logics of performance, of developing the business, of justice too, ... How could a salary totally be fair compared to others in the company who actually bring more? (JdM)*

Secondly, the interviewees unanimously express collective pride in putting such a process into practice and readily present it as a recurring example of courage. In fact, decisions relating to salaries, and in particular pay rises, have a direct impact on the company's strategy and the resources allocated to it.

[Collective] *self-determination takes a lot of courage* [in the salary increase process]. *It already takes a lot of courage to dare to talk about this subject collectively, to dare to say why we're taking this position, for everyone to take a stand individually, for us to take tough decisions that increase our wage bill and force us to set more ambitious targets so that only some of us get a pay rise and not others. I find that we make a lot of very tough decisions, and that the question of salary is often something that requires a lot of managerial courage from managers in traditional companies, and where it's a nightmare for them. And I find that our way of working has a lot of flaws and there are still areas where I think we could make progress, but I'm really proud of what we're doing and I think it's really brave.*

Thirdly, at FLEX, salary rises are decided in an original way compared with traditional companies, since the process described below (see box n°1) is collective and transparent.

Box n°1: Salary increase process at FLE X

At FLEX, salary increases are linked to changes in corporate strategy. Every six months, a seminar is planned to adjust the strategy for the next six months enabling sales assumptions to be projected, necessary investments to be identified and individual objectives to be set. Based on these projections, an envelope is set aside for salary increases, the amount of which is determined by collective agreement. Once this overall envelope has been set, the salary self-determination process is carried out in four stages.

Round 1. Consultation for self-assessment of skills. First, each employee determines the salary increase they wish to request. To do this, they can use the various self-assessment tools proposed by FLEX, as well as asking various people with whom they have recently worked for feedback. Relying on these elements, the employees draft a "letter of intent" in which they express their wish.

Round 2. First group session: review of letters of intent. During a group session, everyone presents and argues for their request and "solicits" their colleagues' opinions. During this deliberation, everyone is free to ask for clarifications. The aim is to check if all the requests are in line with the overall budget and the company's collective values.

Round 3. Informal time for self-regulation. Once everyone's wishes are known, informal exchanges are encouraged to readjust them for greater fairness.

Round 4. Second collective phase: adjustments for final decisions. In this second collective phase, everyone expresses their adjusted salary increase wishes. At the end of the meeting, the overall envelope must be respected, otherwise another stage of self-regulation is launched.

When talking about their experience in the salary increase process, the interviewees mention that courage is mainly based on the notion of balance. Three balances are particularly mentioned when considering the collective wage increase process.

Firstly, our respondents reported difficulties in integrating collective dimensions into situations - such as a pay rise - which are most often based on "individualistic" reflexes.

> *Our question was: how can we make our remuneration more collective? Because today it's very individual, very individualistic, and we could see what could happen, for example, if the manager then redistributes bonuses - which generally come from the organisation - to his or her employees. (MM)*

Individualistic considerations are not necessarily assessed as the most relevant argument by everyone. But at the same time, individuals might find it very difficult to directly contradict someone who, on a subject as taboo as money, screws up his courage to express his added value to the group. The following quote expresses this dilemma.

For example, you have Milady. In this round, she raises her salary saying that it's a bit of a catch-up, in order to have the same salary level as others, talking about inflation, all that. I don't think these are necessarily the right arguments.

[...] If I go to her and say to her: "listen to Milady ... think about what you're asking and your added value, does that seem fair to you?" It breaks her in two ....(JdM)

Secondly, the limits of collective deliberation are often referred to in terms of subjectivity. Indeed, people at Flex showed a tendency to "equip" their collective discussions with organisational devices based on objective criteria.

Perhaps we're thinking that the system we have collectively doesn't allow us to be sufficiently clear and precise about how things work. Maybe we need to review and introduce slightly more objective criteria… in relation to remuneration. (JdM)

To build objective support for collective deliberation, people at Flex rely on what they called "*sandpits*". With regard to the salary process, this is a financial simulation tool enabling everyone to assess the impact of an increase in the wage bill on the company's financial equilibrium.

What seems to be at stake here is the search for a point of balance between the subjectivity of the opinions and arguments brought by individuals to the collective deliberation, and the objectivity of robust knowledge or financial data that would serve, without possible

controversy, as a common basis for the discussion. For Flex, it became clear that relying on people's subjectivity is not enough when it comes to collectively deciding about pay rises. In the meantime, the absence of operational inter-understanding mechanisms based on intersubjectivity to fuel collective deliberation led Flex to think about building objective indicators, both collective and individual.

> *We rely on our subjectivity. We have very, very, very few indicators. We only have collective indicators, we don't monitor competences... [...] For example, we have revenue. But today we don't track individual sales, for example, where we don't track the number of days each person produces ... [...] You don't have any references, you don't have any objectivity on which to base your criticism, you see. So does my subjectivity have more value than another? So in fact we keep quiet. And I believe that it's intersubjectivity that will allow each of us to say to ourselves that there isn't one truth, but there are truths, and we must deal with all that. But if we don't express it, then we can't bring intersubjectivity into play. I think we're missing out on something, and that's potentially a major risk for a participative organisation.* (DL)

Thirdly, both individualism and subjectivism in the salary process seem to lead to another hot topic. To what extent is the collective capable of reaching a strong and impactful consensus, rather than a weak and loose one? Many respondents sometimes regretted the absence of ambitious positions, especially from people considered to be the most legitimate or to have the most authority within the collective. Others report self-censorship when it comes to expressing disagreement, reticence, questioning or frustration (DL). These self-censures seem to be explained by the fear of offending others, particularly their emotions, in an organisational culture that values benevolence. The fact remains, however, that a consensus that is perceived as loose is equated with a lack of courage within the organisation.

I'm almost shocked that the pillars of the company aren't getting bigger [pay rises]. When Danny or Sully e don't get raises ... but guys, what does that actually mean? Well ... OK, the workload, the commercial aspect, we could have more visibility, but the company's doing well, there's no loss of life, or what? Don't you have any confidence in what's going to happen, in your job, in the progress you've made? And you see, from time to time, I think there may be a lack of courage on these issues. (JdM)

This kind of quote told us a lot about how courage may be subject to paradoxes or dilemmas and how even in cases where level or courage (individual, collective, organisation) is articulated. Lack of courage may still be perceived because of the '*fear of breaking a relationship*' (MBe) or by '*hiding behind supposed incompetence*' (GJ). At the same time, excessive individual courage (which could refer to what we called '*classical courage*' above) may lead to a '*feeling of authoritarianism*' (ASR). In collective context, courage seems to find its limits in loose consensus phenomena or **conformism**.

it takes more courage to disagree with the majority than with a hierarchy, because in fact there's very little hierarchy. And so with the majority, I can see the strength of conformism ... When you have eight people saying something and you don't think the same thing, well it's not easy to say[...]. We have an objection system where we can block a decision if we don't agree with it, but we don't use it much at FLEX. And I think it's because of a lack of courage or because it requires a lot of courage. (DL)

Generalising the results of this salary rise situation, we note that individual and collective forms of courage maintain a paradoxical relationship that are regulated by organisational form of courage. In other words, if people need to learn how to hold a conviction, they must also be prepared to let themselves be influenced by the opinions of others, helped by specific deliberation rules and tools. The balance between individual, collective and organisational

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forms of courage seems to be precarious and driven by values. In the company we investigated, workers often talk about a difficult balance to strike between being kind and being demanding when it comes to human relations. The essence and sophistication of organisational courage lie in these articulations.

DISCUSSION AND CONTRIBUTIONS

This article aims to investigate the notion of courage in a particular organisational context, which raises the following research question: how can collective and individual forms of courage be reconciled in organisations, i.e., which managerial practices can further that goal? Relying on an abductive approach, we focused our attention on organisational situations to identify courage practices.

Our results allowed us to identify three levels of courage in organisations. We suggest that individual courage has more to do with *what* is said or done, which can be declined in three ways: 'daring to be' by expressing one's authenticity, 'daring to say' by defending one's convictions and sharing one's emotions, and finally 'daring to do' when taking on new responsibilities. Collective courage refers more to *how* things are done or one's thoughts expressed. In this sense, collective courage may be expressed by a reflexivity on practices that leads to continuous questioning of the relevance of the governance system, a slow-down in decision-making to allow collective intelligence to mature, and a particular attention to emotions so as not to hurt the people concerned. Finally, the organisational level of courage corresponds to the material and formal elements such as meeting processes, roles, group facilitation activities, etc. during which courageous behaviours are adopted.

These results contribute to the courage literature in two ways. Firstly, it allows one to clearly distinguish the different levels of analysis, and notably to see the distinction between collective

and organisational courage (Harbour & Kisfalvi, 2014). Secondly, we propose an understanding of the different articulations between the levels of analysis. We identify regulatory mechanisms between individual and collective courage. Indeed, reflexivity enables us to submit our ideas to others and thus avoid remaining obtuse in our convictions; slowing down the pace of decision-making helps not letting ourselves be guided by a form of impatience and individual spontaneity; and finally, taking emotions into account tempers individual impulsivity. These two levels of courage are then complementary, in the sense that their combination enables and sustains courageous practices. The materiality of the organisational level studied here reinforces this equilibrium by allowing both individual and collective courage to be expressed, and helping to ensure this regulation, thereby promoting virtuous behaviours (Srivastva & Cooperrider, 1998). However, this observation leads us to question the risks of such regulation by the organisational level. In other words, to what extent should organisational courage take on the fears of individuals, without leading to a lack of responsibility thus the risk of employees' disempowerment?

Concerning the practical implications of our analysis, we firstly consider that our article brings clarity to the understanding of what courage concretely looks like and how it is linked with other notions such as vulnerability, decision-making and authenticity (Detert & Bruno, 2017). We indeed noticed that authenticity, defined as 'daring to be ourselves' was considered by some interviewees as the first step to display further courageous behaviours. These insights echo the growing interest in authentic leadership theory (Gardner et al., 2021; Nübold et al., 2020). Finally, our study sheds new light on the organisational processes, rules, roles and artefacts that promote the courageous behaviours (both at the individual and collective levels) needed to develop and sustain an empowering organisation.

This research could be enriched by a specific analysis of courage expressions in liberated

companies (Mattelin-Pierrard et al., 2020; Picard & Islam, 2020; Sferrazzo & Ruffini, 2019; Arnaud et al., 2016). Future research could explain how its characteristics of distributed managerial practices influence the individual, collective and organisational capacity of courage. It could also be interesting to use our multi-level courage framework as a new perspective for defining how empowerment can be expressed and defined, and thus an original analytical grid to evaluate the degree of a company's 'liberation'.

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