The More, the Merrier? Membership Expansion and Incumbents' Boundary Work Divergence in the Platformization of Belgian Philanthropy

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ABSTRACT   When actors emerge on the periphery of a field, incumbents either engage in protective boundary work to enforce the field's membership criteria, or opt for membership expansion by adapting these criteria to accommodate peripheral actors. Less explored is the divergence configuration where a minority of incumbents pursue expansion whereas the majority adopt a protective strategy. Since the inclusion of peripheral actors may challenge membership criteria (i.e., the symbolic boundary) and shift the resource distribution and social hierarchy (i.e., the social boundary), how minority incumbents induce membership expansion against the majority's protective stance is an intriguing question. Drawing on a qualitative field-level case study of Belgian philanthropy, we examine incumbent foundations' responses to the rise of 'social-mission platforms.' We identify four mechanisms through which minority incumbents can overcome the majority's initial opposition and bring about support to membership expansion: affirming divergent expansive posture, leveraging definitional ambiguity, demonstrating comparative reinforcement, and facilitating shared buy-in. We further show how each mechanism bridges the social and symbolic boundaries through the combined (re)actions of the diverging incumbents and the peripheral actors. Our findings extend understandings of membership expansion as a contested, multi-actor process and unpack the interaction of social and symbolic boundaries in shaping field evolution.

Keywords: boundary work, incumbent, membership expansion, philanthropy, social boundary, symbolic boundary

INTRODUCTION

Boundaries are central in the institutionalization of fields (DiMaggio and Powell, 1983). While symbolic boundaries define the field's central and distinctive characteristics, social boundaries serve to regulate resource allocation and within-field power relations (Lamont and Molnár, 2002; Tilly, 2004). Yet, boundaries are not set in stone. Field actors, in particular incumbents – organizations 'who wield disproportionate influence within a field' (Fligstein and McAdam, 2015, p. 5) – can alter them through 'boundary work' (Gieryn, 1983, 1999). Prior research suggests that incumbents are more likely to engage in boundary work when actors emerge on the periphery of a field and introduce new practices that potentially question field membership criteria (Hensmans, 2003; Leblebici et al., 1991). While the strategies of incumbents to resist 'challengers' that aim to enter the field and capture its resources are well documented (Edman and Arora-Jonsson, 2022; Fligstein and McAdam, 2015; Zietsma and Lawrence, 2010), their reaction in the face of actors that develop new practices yet do not necessarily claim field membership – which we refer to as 'peripheral actors' (Grodal, 2018; Zietsma et al., 2017) – is less clear.

Most often, incumbents seek to integrate the new practices, rather than the actors embodying them, within the field (Faulconbridge et al., 2023; Gawer and Phillips, 2013). Incumbents tend to adopt such a 'protective' approach, leaving membership criteria intact (Langley et al., 2019; Lawrence, 2004), because integrating distinctive peripheral actors risks diluting incumbents' collective identity and access to resources (Grodal, 2018; Patvardhan et al., 2015), thereby shifting power relations and threatening incumbents' centrality in the field (Kipping and Kirkpatrick, 2013). In some cases, however, to increase the field's critical mass and legitimacy (Huybrechts et al., 2023; Lee et al., 2017), incumbents may seek to integrate the peripheral actors as field members, thereby pursuing 'membership expansion' (Grafström and Windell, 2012). Prior work has paid attention to membership expansion mainly when it is commonly adopted by field incumbents (Faulconbridge et al., 2023; Grodal, 2018), often under the impetus of their 'collective networks' – such as professional or trade associations (Kipping and Kirkpatrick, 2013). Since collective networks often have the capacity to discipline potentially divergent incumbents (Buchanan and Barnett, 2022) and to build consensus internally (Cloutier and Couture, 2024), prior research has assumed relatively spontaneous convergence among incumbents regarding whether to expand membership to include peripheral actors. For example, when sustainable tourism operators emerged on the fringes of the Dutch outbound tour operations field, the field's collective network decided to extend membership to these actors, despite certain incumbents' reluctance to address sustainability issues (van Wijk et al., 2013).

By focusing on such convergent outcomes, however, this research has tended to overshadow the possible divergence in boundary work strategies among incumbents and the way in which such divergence can be dealt with. In other words, when some incumbents engage in protective boundary work to enforce extant membership criteria while others opt for membership expansion, adapting those criteria to accommodate peripheral actors, collective consensus is unlikely to be easily reached (Bucher et al., 2016; Helfen, 2015). Divergence is more likely to be observed in fields formed

around an issue, so-called 'issue fields', because in such settings 'isomorphic pressures are weak, field identity is ambiguous [and] boundaries are highly permeable.' (Zietsma et al., 2017, p. 401). Yet we know little about instances in which membership expansion comes to be supported by a minority of incumbents whereas the majority of other incumbents adopt the more expected protective stance. In this context, to maintain their powerful positions and vested interests, the majority of incumbents are likely to oppose membership expansion by protecting the field's social and symbolic boundaries (Faulconbridge et al., 2023). Therefore, in order to achieve membership expansion despite such resistance, the minority of incumbents will need to skilfully leverage expansion of both symbolic and social boundaries. Therefore, we ask: *How can a minority of incumbents overcome boundary work divergence and induce membership expansion?* Understanding this process is important to shed light on less documented trajectories through which field membership expansion can be achieved in a way that does not necessarily correspond to the expected stance of the majority of incumbents. Moreover, answering this question helps to understand how the contested process leading to membership expansion may reconfigure power relations not only between incumbents and peripheral actors, but also among incumbents themselves.

To answer this question, we explore the field of organizational philanthropy in Belgium. More particularly, we focus on how incumbent foundations and their collective networks reacted to the 'platformization' trend (Helmond, 2015; Kenney and Zysman, 2016) embodied by the growing numbers of 'social-mission platforms' at the field's periphery (Hajiheydari and Delgosha, 2023). Focused on democratizing philanthropy by enabling platform-based giving, as illustrated internationally by success stories such as Spacehive (UK) (Logue and Grimes, 2022), these platforms explore alternatives to philanthropy's exclusive reliance on top-down allocation of resources through foundations. In our study, while most incumbent foundations considered that platformization could be pursued from within, that is, without granting membership to the platform-based peripheral actors, a few foundations advocated for the inclusion of such platforms as the best way to endorse the platformization trend. Over time, a bit unexpectedly, the latter minority managed to convince the – initially reluctant – majority of incumbents to embrace membership expansion.

Our analysis identifies four core mechanisms through which a minority of incumbents (which we label as 'expanders') may succeed in bringing about membership expansion despite the initial opposition of the majority of incumbents (which we call 'protectors'). These mechanisms connect and gradually shift the balance between protective and expansive boundary work strategies, ultimately favouring membership expansion. First, taking advantage of their cross-field positioning derived from their emergence from outside of the field, expanders brought the emergence of peripheral actors into the spotlight and signalled their willingness to include these actors in the field, thereby *affirming a divergent expansive posture* in contrast to the other incumbents' protective stance. Second, expanders succeeded in *leveraging definitional ambiguity* in how membership criteria were defined, challenging the field's symbolic consensus to accommodate platforms as legitimate members and partners. Peripheral actors took advantage of such divergence – and the subsequent reframing of the field's membership criteria – to claim their affiliation to philanthropy in a way that could not be countered

by protector incumbents. Third, through *demonstrating comparative reinforcement*, expanders showed to protectors how collaborating with platforms, rather than only among foundations, could be more beneficial in reinforcing foundations' resources and expertise. Finally, based on such benefits, expanders gained sufficient leverage to redefine philanthropy in a way that accommodated platforms' participation, thereby *facilitating shared buy-in* from the broader group of incumbents. Such buy-in was smoothed by the selective nature of membership expansion, in which a membership sub-category was created for the most 'compatible', that is, non-commercial and non-competing, platforms. Overall, our analysis shows how, through the compounding interplay of the three types of actors, each mechanism leveraged shifts in symbolic and social boundaries in a way that enabled membership expansion.

These findings bring two contributions to the literature on boundary work and field boundaries. First, we develop a finer-grained understanding of how incumbents manage divergence in boundary work strategies, extending beyond the often-assumed homogeneous and protective view of incumbents' collective boundary work (Helfen, 2015; Langley et al., 2019). In doing so, we theorize membership expansion as a contested, multi-actor process (Cloutier and Couture, 2024) through which a minority of incumbents may skillfully reshape symbolic and social boundaries, drawing in other incumbents in support of their expansive strategy. Second, we refine understandings of the interaction between social and symbolic boundaries (Grodal, 2018; Lamont and Molnár, 2002). While extant literature has shown how the symbolic boundary influences the social boundary, our process model extends this view by documenting how, conversely, incumbents may leverage social boundary shifts to affect the symbolic boundary. By showing how a minority of incumbents may seize the contradictions between symbolic and social boundaries to generate de facto membership expansion in a way that cannot be countered by the majority of incumbents, our study brings a more nuanced understanding of how both types of boundaries can be strategically articulated and influence field evolution (Zietsma et al., 2017).

THEORETICAL BACKGROUND

Field Membership, Boundaries and Boundary Work

An organizational field is commonly defined as 'a community of organizations that partakes of a common meanings system and whose participants interact more frequently and fatefully with one another than with actors outside the field' (Scott, 1995, p. 65). The process of deciding who belongs to a field or not is of strategic importance as membership grants access to material (e.g., funding) and non-material resources (e.g., expertise, reputation, networks) (Lounsbury and Glynn, 2001). As organizations increasingly interact around shared interests and identify themselves as field members, they collectively establish membership criteria – formal and informal rules that define who is eligible to the field and its associated resources (Lawrence, 2004). These membership criteria, in turn, form the basis of field boundaries, which we conceptualize here as 'a distinction among people and groups' (Zietsma and Lawrence, 2010, p. 191) – that is, between those who meet membership criteria and are recognized as

field members and those who fail to meet these criteria and are excluded from membership. Membership criteria tend to reflect the vested interests of powerful, incumbent field members, who define and police boundaries to safeguard their privileged access to the resources associated with membership (Edman and Arora-Jonsson, 2022; Fligstein and McAdam, 2015).

Studies of field boundaries have revealed the interdependent role of two types of boundaries in delineating and regulating field membership: symbolic and social boundaries (Grodal, 2018; Lamont and Molnár, 2002). The symbolic boundary represents 'conceptual distinctions made by social actors' (Lamont and Molnár, 2002, p. 168): it draws the central and distinctive characteristics categorizing field members as similar to one another and different from outsiders, thereby forging the field's collective identity (Glynn, 2008; Patvardhan et al., 2015). The symbolic boundary acts as a threshold for actors to be deemed eligible to field membership. For example, Peifer (2014) shows how religious mutual funds either blurred or sharpened their compliance with the characteristics that define religion and finance, depending on whether they sought to claim membership in one field or the other.

On the other hand, the social boundary concretizes the abstract symbolic boundary by enabling members to access field resources (Grodal, 2018). The social boundary represents 'objectified forms of social differences manifested in unequal access to and unequal distribution of resources (material and non-material) and social opportunities' (Lamont and Molnár, 2002, p. 168). Through resource allocation, the social boundary serves to regulate within field-interactions, to stratify power relations and to determine field members' social position (Tilly, 2004). For example, Zietsma and Lawrence (2010) document how the social boundary of the British Columbia forestry industry was regulated by the Ministry of Forests which owned the forest land and controlled access to forest resources through the allocation of tenures to forest companies.

Given the centrality of symbolic and social boundaries in protecting field resources and incumbents' interests, they are never 'incidental' (Hernes, 2004, p. 10) nor 'a priori given' (Lindberg et al., 2017, p. 82); instead, they are the object of strategic considerations (Lawrence, 2004). Boundaries are typically subject to redefinition following disruption in the broader institutional environment such as regulatory changes, technological innovations or new consumer demands (Hoffman, 1999). Such shifts often lead to the emergence of new actors on the field's periphery (Leblebici et al., 1991), whether pro-active 'challengers' who aim to outcompete field incumbents (Fligstein and McAdam, 2015; Hensmans, 2003), or more passive 'peripheral actors' who do not necessarily claim field membership (Grodal, 2018; Zietsma et al., 2017). The emergence of challengers or peripheral actors may question field boundaries and lead incumbents to undertake 'boundary work' (Gieryn, 1983), that is, 'the ongoing and interactive sequences of actors' situated efforts to establish, maintain, challenge and/or move across boundaries' (Glimmerveen et al., 2020, p. 1509).

When faced with the arrival of potentially challenging actors, incumbents generally engage in 'protective' boundary work, enforcing membership criteria to prevent these actors' potential entry and access to field resources (Gieryn, 1999; Langley et al., 2019). In this protective boundary work, incumbents adapt their set of practices rather than revising membership criteria, maintaining the symbolic and social distinction between current field

members and outsiders (Evans, 2021). For example, when online music services emerged on the fringes of the American music industry, challenging the market dominance of major music labels, the latter engaged in protective boundary work to resist online players' entry into the field (Hensmans, 2003; Sauder, 2008). However, in the case of more passive peripheral actors that do not directly threaten their position, incumbents may be willing to revise membership criteria to integrate these actors into the field (Faulconbridge et al., 2023) and seize the trends and innovations emerging at the periphery of the field (Grafström and Windell, 2012). While prior research has shown how, under such circumstances, incumbents collectively and unanimously favour membership expansion (Grodal, 2018; Helfen, 2015), instances in which such strategy is pursued only by certain incumbents against the common protective stance have remained less understood so far.

Incumbents' Divergence Around Membership Expansion

Membership expansion presents both risks and opportunities, the perception of which will influence incumbents' boundary work strategies (Langley et al., 2019). When the field is already well established and enjoys abundant resources and external recognition (e.g., Greenwood and Suddaby, 2006), membership expansion may be seen as unnecessary and risky (Kipping and Kirkpatrick, 2013). Indeed, including peripheral actors that do not fully align with the field's central and distinctive characteristics risks diluting the field's collective identity and thereby reducing its attractiveness and legitimacy (Grodal, 2018; Patvardhan et al., 2015). For example, Kipping and Kirkpatrick (2013) observed the fragmentation of the professional field of management consulting as the professional association accommodated new entrants, allowing them to benefit from the field's reputation (social boundary) despite their divergence from its distinctive organizational characteristics (symbolic boundary).

As the latter example illustrates, collective networks, such as professional associations and federations, play a significant role in shaping incumbents' collective response to the arrival of actors on their field's periphery (Vermeulen et al., 2007). Conceived as 'field-governing bodies' (Zietsma et al., 2017), collective networks have the mandate to formalize, enforce and amend membership criteria that regulate access to field resources and safeguard incumbents' position within the field, often resulting in protective boundary work (Buchanan and Barnett, 2022). In the boundary work literature, the predominance of empirical research on fields with strong collective networks has reinforced the view that incumbents spontaneously converge in their protective boundary work when faced with the development of peripheral actors (Bucher et al., 2016; Helfen, 2015). However, in more weakly governed settings such as in 'issue fields' (Zietsma et al., 2017), several studies have hinted at situations in which incumbents hold divergent views as to whether or not engage in membership expansion (Cloutier and Couture, 2024; Kim and Schifeling, 2022). For example, in their study of the contestation over the boundary between home sharing and short-term rental triggered by the rise of platforms like Airbnb, Klopf et al. (2024) observed that some short-term rental incumbents supported home sharing actors and models while others, including the field's collective networks, defended their established model.

The outcome of such divergence among incumbents is likely to depend on the power positions of the two diverging incumbent groups. Typically, when a minority of incumbents favours membership expansion, we may expect a more powerful

group, led by one or several collective networks, to impose a protective stance upon the divergent incumbents, typically through threats of sanctions and delegitimization. For example, Buchanan and Barnett (2022) illustrate how a trade association in the Canadian mining industry threatened to exclude non-compliant members in order to preserve its reputation with key stakeholders. Nevertheless, since power positions are not set in stone, some incumbents may see the perspective of membership expansion as a favourable pathway to pursue, even if it challenges the dominant consensus. This is likely to be the case when these incumbents perceive opportunities that others do not (Greenwood and Suddaby, 2006), and expect to reinforce their position through, for example, gaining privileged access to peripheral actors (De Clercq and Voronov, 2009), enhancing their innovative potential and reputation (Compagni et al., 2015), and pioneering field change to their advantage (Gawer and Phillips, 2013). Yet, how a minority of divergent incumbents can engage in expansive boundary work while the majority pursues a protective strategy and how the interaction between these two opposed strategies ultimately shapes field evolution is less clear. To overcome the resistance of their protective counterparts and induce membership expansion, we suggest that the minority of incumbents favouring expansive boundary work will need to skilfully act on both symbolic and social boundaries. The field of organizational philanthropy in Belgium provides a particularly relevant setting to explore this process.

METHODS

The Field of Organizational Philanthropy in Belgium

Philanthropy is commonly defined as 'the use of private resources – treasure, time and talent – for public purposes' (Phillips and Jung, 2016, p. 7). Given the diverse interpretations of 'what constitutes the "good" for the "public"' (Phillips and Jung, 2016, p. 9), philanthropy is a historically contested field (Gautier, 2019). Peripheral actors have regularly emerged at the fringes of the field to question its meanings and suggest alternative philanthropic practices in light of broader societal developments (Cunningham, 2016). For example, in the 2000s, the dot-com boom brought venture-capitalist entrepreneurs to the fringes of philanthropy, pushing the idea of 'venture philanthropy', which rejected the opacity and unaccountability of traditional philanthropy and instead favoured 'investing in and strengthening the organizational capacity of social-purpose organizations' (Mair and Hehenberger, 2014, p. 177).

More recently, as 'platformization' of our society has become a global phenomenon (Helmond, 2015; Kenney and Zysman, 2016), digital platforms have emerged to tackle complex societal challenges (Gegenhuber and Mair, 2024). In the philanthropic field, 'social-mission platforms' have leveraged the power of digital technologies to develop more open and participatory philanthropic tools (Hajiheydari and Delgosha, 2023). Such 'platformization' seeks to enable the involvement of a variety of stakeholders (e.g., not only foundations, but also businesses and citizens) in philanthropic activity and decision making around what projects or causes are a priority, and how they are funded (Presenza et al., 2019). A well-known example is UK-based

Spacehive that enables citizens to improve their local areas by crowdfunding social-purpose projects in collaboration with local authorities, businesses and foundations (Logue and Grimes, 2022). While increasingly praised as effective vehicles for making philanthropy more participatory (Bernholz, 2016), platforms' integration into philanthropy has also been resisted because of the commercial nature of certain platforms and their financial interests in defining what is 'legitimate' for the public good (Banerjee, 2021; Davies, 2020).

Our study focuses on a period of contestation among Belgian foundations as to the opportunity to integrate platforms as members of the philanthropic field. In Belgium, as in other countries, philanthropy has long been associated with the work of foundations (Jung et al., 2018). The country counts approximately 2000 philanthropic foundations, active in areas such as social welfare, medical research and cultural heritage preservation. Most foundations focus on fundraising and grant-making, while some of them also organize volunteering and policy support (Mernier and Xhauflair, 2017). Belgian foundations are regulated by a law dating from 1921 and updated in 2002 (Vandenbulke, 2016). Yet, this law does not define what philanthropy is nor specify that only foundations can engage in philanthropic activities. Moreover, from a fiscal viewpoint, any type of non-profit organization can raise donations and grant tax deductibility certificates to their donors. However, in terms of field membership definition, the criteria to self-identify and be recognized as a 'philanthropic' actor have been left to the authority of foundations and in particular a few major, long-established incumbent foundations (Mernier, 2017). These large incumbents have played a central role in the founding of three collective networks: the Association (representing foundations), the Fundraising Centre (promoting 'good governance' in fundraising), and the Volunteering Centre (advocating for best practices in volunteering). These collective networks have the mandate to build the capacity of their members and defend their interests in front of external stakeholders.

Between 2014 and 2016, diverse types of social-mission platforms emerged in Belgium to promote a more participatory and transparent approach to giving. Some of them were crowdfunding platforms enabling citizens to co-fund social-purpose projects (e.g., Money&More); others enabled customers to engage in micro-giving when purchasing in given shops (e.g., Biz4Good); and still others facilitated volunteering through 'crowd-timing' (e.g., Time2Give). As expected, the majority of incumbent foundations in the field adopted a protective stance and ignored the development of these platforms, relying on the symbolic boundary that implicitly equated philanthropic membership with foundations. Such a protective stance was supported by Belgian authorities, which denied platforms the right to issue certificates for tax-deductible donations, a privilege reserved to foundations and non-profit organizations. Yet, in parallel, three foundations positively welcomed platforms as a potential new type of philanthropic actor that could help foundations to adopt a more participative, 'platformized' model. Besides differences of size and activities, these foundations had in common that they were created by a non-philanthropic parent organization and therefore seemed to display a stronger interest in activities and innovations taking place outside of and at the periphery of the philanthropic field. From 2016 on, these expansion-driven foundations initiated a study to deepen their understanding of platforms, invited platforms to field-configuring events, offered them support, and encouraged others to collaborate with them. In doing so, they

challenged the membership criteria of philanthropy (i.e., its symbolic boundary) and the allocation of resources and interactions associated with membership (i.e., its social boundary).

Although divergent approaches on field membership and boundaries between incumbent foundations could have led to field fragmentation or to the exclusion of the three expansion-driven foundations from the field, over time, the latter managed to rally the majority of foundations in supporting the integration of platforms as members of the Belgian field of philanthropy. The reshaping of field boundaries was visible, for example, through the platforms' access to financial and logistical collaborations with all foundations, their recognition as philanthropic actors by the fiscal administration, and hence their right to issue certificates to donors for tax-deductible donations. From 2019 onwards, such integration enabled platforms to significantly increase their financial resources, as illustrated in Figure 1.

Data Collection

We conducted a qualitative field-level case study (Eisenhardt, 1989; Gioia et al., 2013) of Belgian philanthropy through collecting four types of data from 2016 to 2021 (see Table I for an overview and Appendices I-II-III for full specification): (1) 38 semi-structured interviews, including 24 with incumbent philanthropic foundations and their collective networks and 14 with social-mission platforms; (2) an in-depth focus group with platforms; (3) ethnographic observations at seven field-configuring events and (4) the analysis of 225 archival documents.
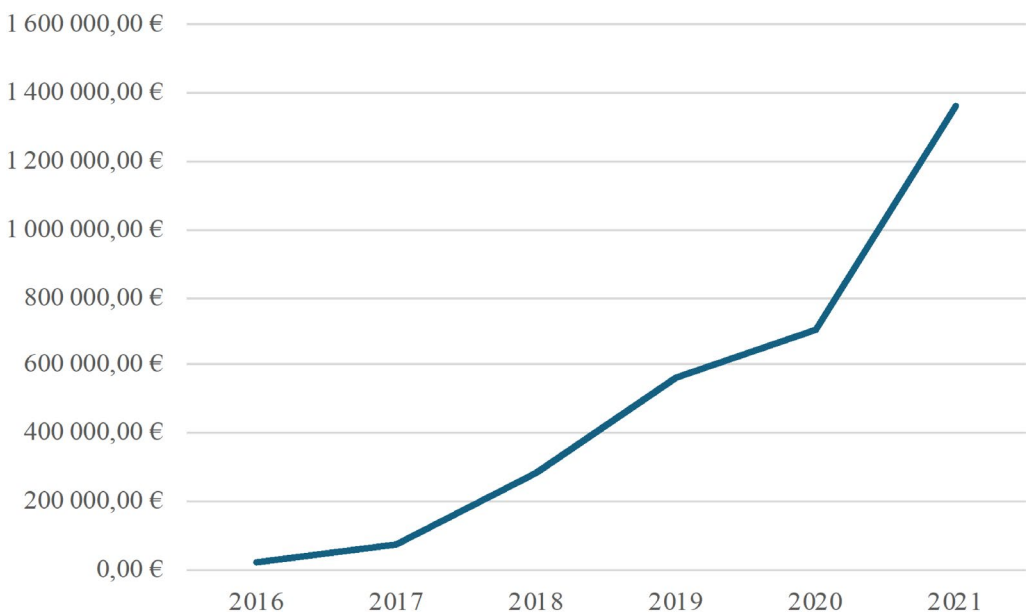

Figure 1. Evolution of platforms' financial resources
Source: Platforms' revenue as reported in their financial statements published on the website of the National Bank of Belgium.

Table I. Data collection

Type	Number of sources	Description
2016–2017		
Expanders		
Observations	Event 1 & 2	Organized by Big Foundation
Archival materials	11 documents	4 meeting minutes; 3 event-related documents; 4 emails threads
Platforms		
Semi-structured interviews	7 interviews	Platform founders
Focus group	4 hours	6 platform founders; 1 Nextdoor Bank representative
Archival materials	45 documents	19 emails threads; 6 legal documents; 6 press articles; 6 websites; 8 social media pages
2018–2019		
Expanders		
Semi-structured interviews	5 interviews	Representatives of expansion-driven foundations
Observations	Events 3 and 6	Respectively, organized by Nextdoor Bank and Big Foundation, and by Citizenship Foundation
Archival materials	35 documents	1 meeting minute; 5 event-related documents; 2 legal documents; 2 newsletters; 1 press article; 5 websites; 4 social media pages; 8 emails threads; 7 reports
Protectors		
Semi-structured interviews	12 interviews	Representatives of protective foundations and collective networks
Observations	Events 4 and 5	Respectively, organized by Transformative Foundation and Association
Archival materials	61 documents	3 event-related documents; 11 legal documents; 4 newsletters; 11 websites; 6 social media pages; 7 reports; 19 emails threads
Platforms		
Semi-structured interviews	7 interviews	Platform founders
Archival materials	33 documents	4 legal documents; 6 press articles; 5 websites; 4 social media pages; 14 emails threads
2020–2023		
Expanders		
Semi-structured interviews	2 interviews	Representatives of expansion-driven foundations
Archival materials	15 documents	1 event-related document; 8 reports; 6 emails threads
Protectors		
Semi-structured interviews	5 interviews	Representatives of protective foundations collective networks

Table I. (Continued)

Type	Number of sources	Description
Observation	Event 7	Organized by Association
Archival materials	21 documents	1 legal document; 1 press article; 10 reports; 8 emails threads; 1 website
Platforms		
Archival materials	4 documents	3 press articles: 1 email thread

Our data collection started in October 2016 with a study commissioned by two expansion-driven foundations, the Big Foundation and the Nextdoor Bank, to better understand how platforms could bring innovative practices to philanthropy. The second author led the study and gained privileged access to the field, including access to informal meetings and regular conversations with numerous informants (Langley and Klag, 2019). They interviewed seven founders of platforms between March and July 2017 and organized a focus group with six of them in October 2017. The results of this study were presented in a report and at a conference gathering the bulk of Belgian foundations (Event 3). This study and its associated events unveiled the diverging approaches of foundations in terms of their vision of and interaction with platforms.

To further explore such divergence, the second author conducted interviews with the largest incumbent foundations and their main collective networks in 2018 and 2019. Consistent with our research objective, we focused on fundraising and grant-making foundations that serve a public purpose, excluding operating foundations (e.g., museum or hospitals) and foundations that pursue personal objectives for their founders (e.g., taking care of vulnerable family members). We targeted the 12 largest incumbent foundations, meaning those with a turnover exceeding 200,000 euros and highest involvement in the collective networks and associated field-configuring events (see Table II for an overview).

Interview questions concerned incumbents' perceived definition of philanthropy, membership criteria and positioning regarding the development of platforms. These interviews allowed us to better understand the divergence between three foundations that positively welcomed platforms (the Big Foundation, Nextdoor Bank and Citizenship Foundation) and the majority of foundations, as well as their collective networks, which resisted the integration of platforms within the philanthropic field. We labelled the three incumbent foundations engaging in expansive boundary work as 'expanders', whereas those pursuing protective boundary work were designated as 'protectors.'

In 2019, the second author conducted additional interviews with seven platforms, four of which had already participated in the initial study and the focus group organized in 2017. The three others were identified through interviews with foundations. Interviews with platforms aimed to assess their perception of foundations' expansive and protective postures and their own objectives with regard to the field of philanthropy. Table III presents an overview of the characteristics of the platforms examined in our study.

Then, between 2020 and 2021, we conducted a follow-up wave of seven interviews with the collective networks and the foundations that appeared most emblematic of the

Table II. Overview of incumbent philanthropic foundations and collective networks

Interview	Name	Created by	Year	Assets	Staff	Initial posture with regard to platforms
Philanthropic foundations						
Expanders						
1	Big Foundation	Belgian State	1976	1.391.749.646	105	'There is a whole new generation of actors who are very capable of developing tools quickly, which are quite efficient and quite fun.'
2						
3						
4						
13	Citizenship Foundation	Cooperative insurance group	2000	500.000	2	'[The platforms] are not foundations, but they are also a kind of philanthropists.'
14						
18	Nextdoor Bank (philanthropy department)	Bank	2008	200.000	6	'There is something that doesn't work [in traditional philanthropy], we need to change our glasses! [...] And that's how we came to this subject [...] of platforms and philanthropy. [...] And it's encouraging!'
Protectors						
9	Well-Being Coop	Cooperative bank	1998	4.953.503.866	43	'[Platforms] come at full speed with a new idea but if they had looked at the existing landscape [they would have realized that] there is already someone who's doing it.'
15	Oldest Fund	Individual philanthropist	1974	81.008.562	2	'It's mostly communication.'
10	YouthPower	Individual philanthropist	1974	53.250.426	4	'What is the added value of this platform compared to [incumbents]? What sets it apart?'
11						
12	Job4All Foundation	Private bank	2008	25.972.057	3	'[These] are commercial platforms. [Their] main mission is to sell IT tools.'
5	Transformative Foundation	Individual philanthropist	1998	7.532.371	13	'These [platform leaders] are rushing into things, believing that they have completely new solutions [while] in fact it is simply the same thing over and over again.'
6						
7						

(Continues)

Table II. (Continued)

Interview	Name	Created by	Year	Assets	Staff	Initial posture with regard to platforms
8	Family Foundation	Wealthy family	2015	1.568.269	3	'Just because it's digital doesn't mean it's going to bring about transformation. [...] It's an individual dynamic, with everyone remaining behind their screens.'
23	Funds4Impact	Individual philanthropist	2015	1.168.583	27	'From the moment they need funds that are not from themselves to develop something, for us, they cannot be philanthropists.'
17	GlobalizAid	Wealthy family	1995	954.647	7	'[Platforms] to do what? For whom? It is the main question, always, in philanthropy. For me, philanthropy is a profession.'
16	Holism&Harmony	Individual philanthropist	2013	Not available	2	'We see them emerging, but honestly, I don't think these platforms [...] will lead us to change our practices.'
Collective networks						
21	Volunteering Centre	Created by foundations and non-profit organizations	2002	283.958	9	'I find that there is a lot of arrogance in [platforms], which I really don't like. [...] I want to ask them: who do you think you are, guys? We exist, after all!'
22						
24	Fundraising Centre	Created by foundations and non-profit organizations	1996	100.980	3	'These platforms are currently very, very marginal [...]. Over the past [...], I've seen quite a few similar initiatives come and go. So, we remain relatively [...] cautious.'
19	Association	Created by foundations	2004	40.500	2	'They are service providers [...] that targets players in the philanthropic field. Now, are they themselves philanthropic? I don't think so.'
20						

Note: Information derived from organizations' website and annual reports. Total assets are presented as published by the National Bank of Belgium, except for The Nextdoor Bank where assets have been estimated based on our data collection.

Table III. Overview of social-mission platforms

Interview	Name	Type	Legal form	Creation	End Year
25	Biz4Good	Crowdfunding	For-profit	2016	2020
26					
27	Money&More	Crowdfunding	For-profit	2014	/
28					
29	SkillUp	Crowdtiming	Non-profit	2015	2021
30	Time2Give	Crowdtiming	Cooperative	2016	/
31					
32	GivingWhizz	Crowdfunding	For-profit	2014	/
33					
34	LinkedUp	Crowdtiming	Non-profit	2016	2020
35	Smile&Pick	Crowdtiming	Non-profit	2016	/
36	SolyNet	Crowdfunding	Non-profit	2014	/
37	HelpPooling	Crowdfunding	Non-profit	2016	/
38	Colibris Booster	Crowdtiming	Non-profit	2018	/
/	AdvertRaising	Crowdtiming	For-profit	2019	/

expansive and protective postures. These follow-up interviews allowed us to deepen our understanding of the interactions among foundations and to identify how the integration of platforms by the three 'expanders' influenced the relationship among foundations and with platforms, which had multiplied since the first waves of interviews. Overall, the interviews lasted 90 minutes on average and were fully recorded and transcribed. For the sake of anonymity, the names of the organizations were replaced by pseudonyms.

To triangulate our findings (Rouse and Harrison, 2016), we also analysed three types of archival documents. First, we aggregated minutes from meetings (N = 5) during the conduct of the commissioned study and emails exchanged (N = 79) with interviewees from 2017 to 2021. Second, for each of the seven events, we obtained supporting data (N = 12) such as programs, reports and lists of participants, deepening our understanding of members of the field, social positions, relationships, and resources. Third, until 2 years after the observation period (i.e., until 2023), we collected publicly available documents (legal documents, newsletters, press articles) (N = 47) and information from websites (N = 28) and social media accounts (N = 22) of foundations, collective networks and platforms interviewed as well as publications issued by foundations and collective networks (such as annual reports and analyses) (N = 32). Finally, the second author attended seven field events organized by foundations and their collective networks between 2017 and 2021, providing an opportunity to 'witness a field in action' (Wooten and Hoffman, 2017, p. 60).

Data Analysis

While the second author's deep involvement in Belgian philanthropy allowed access to rich data, emerging insights were analysed collectively with the help of two co-authors

having more distance from the empirical phenomenon. The interaction between insider and outsider team members was essential to reduce potential biases and improve the rigour of the analysis (Gioia et al., 2010). Our analytical process was iterative (Timmermans and Tavory, 2012), cycling between theory and data in an abductive way and acknowledging the role of theory in enriching the coding process (Kreiner, 2016).

We started by examining the response and positioning of the different foundations with regard to the arrival of platforms. We considered whether these differences could be explained by key differences in terms of size. Interestingly, the three foundations supporting membership expansion did not seem to differ from other incumbents in terms of financial resources, as indicated in Table II and depicted in Figure 2: one foundation was among the larger ones (yet not the largest), while the two others were among the smallest. However, what distinguished the three expander foundations from the majority was their distinct emergence trajectory. Unlike protector foundations, they were not created by a family or wealthy individual but by a parent organization outside of the philanthropic field, such as a bank and an insurance cooperative.

Then, with the insights from the two groups of incumbents (i.e., expanders and protectors) as well as from the platforms, we organized our empirical data chronologically, highlighting sequences demarcated by key events (Langley, 1999). We identified five sets of events (see Figure 3) that reflected important shifts in how foundations responded to the arrival of platforms on the periphery of Belgian philanthropy. While negotiations of membership criteria marked changes in the field's symbolic boundary, other events related to interactions and allocation of resources indicated shifts in the social boundary. Two co-authors then proceeded to open coding of the positions of and interactions between foundations and platforms over time, and they each proposed a provisional list of first-order codes. After discussing the codes in the co-authors' team, we agreed on a list
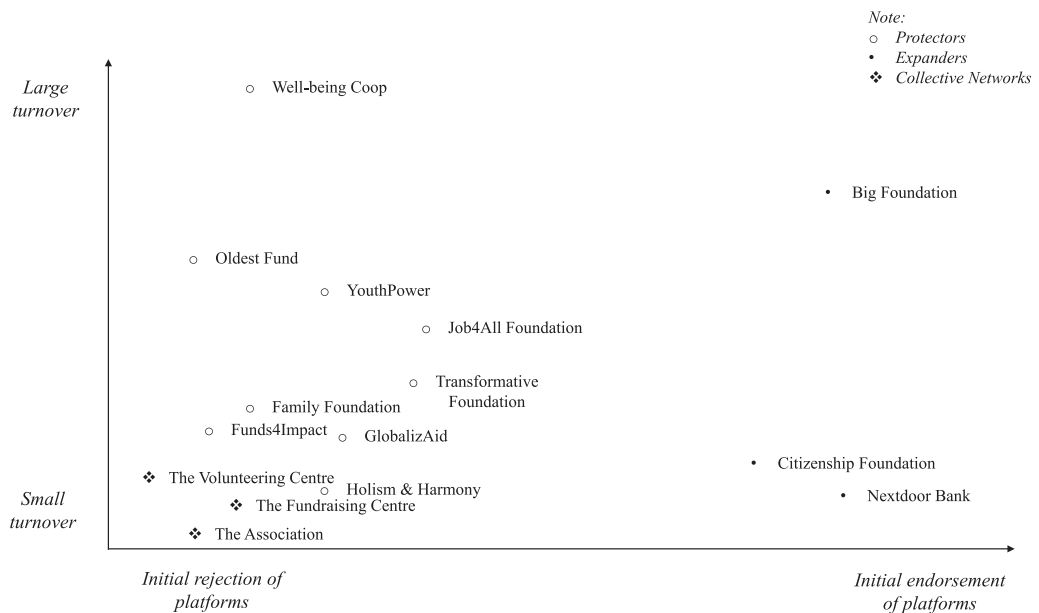

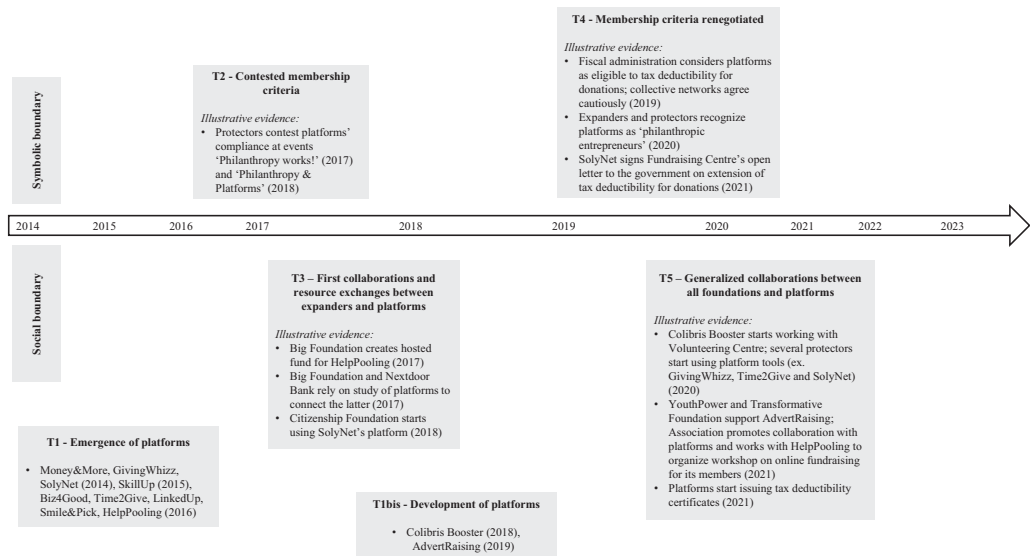Figure 2. Categorization of incumbents

Figure 3. Chronology of events

of 37 first-order codes encapsulating the boundary-related discourse and actions undertaken by the three sets of actors (i.e., expanders, protectors and platforms) in between key events.

Through axial coding, we merged first-order codes into second-order codes that grouped similar discourse and actions by the three sets of actors in their attempts to maintain or reshape philanthropy's social and symbolic boundaries. Consistent with Lamont and Molnár (2002), we associated with the symbolic boundary the codes related to membership criteria, including distinctive characteristics and values. Then, we grouped under 'social' the codes describing how field membership granted access to material and non-material resources as well as collaboration opportunities.

Finally, going back and forth between our empirical data and extant literature on field boundaries and boundary work (Grodal, 2018; Zietsma and Lawrence, 2010), we identified four aggregate dimensions encapsulating the mechanisms through which expansive boundary work gradually took precedence over protective boundary work, ultimately enabling membership expansion: (1) *affirming divergent expansive posture*, (2) *leveraging definitional ambiguity*, (3) *demonstrating comparative reinforcement* and (4) *facilitating shared buy-in*. We realized that each mechanism relied on a shift in one boundary but also directly enabled a shift in the other boundary. Moreover, the connection between symbolic and social boundaries relied on a compounding 'snowball-like' interplay of actions and reactions undertaken by the three groups of actors: the strategy deployed by expanders to bring about membership expansion; the amplifying reaction of platforms taking advantage of expanders' strategy; and the difficulty of protective incumbents to counter expanders' strategy, ultimately leading them to concede on and embrace membership expansion. Table IV shows the data structure and Table V provides illustrative empirical material.

Table IV. Coding structure

First order codes	Second order codes	Aggregate dimensions
Connecting with non-philanthropic emergence roots	Scrutinizing societal trends through external stakeholder engagement	1. Affirming divergent expansive posture
Integrating stakeholders from diverse societal domains in decision-making processes		
Contributing to field-spanning societal challenges		
Becoming acquainted with platformization trends and actors	Making platforms visible in the field	
Diffusing platformization trends and actors to other foundations and collective networks		
Attempting to define common exclusive definition of philanthropy	Struggling to define common ineligibility criteria	2. Leveraging definitional ambiguity
Rejecting the idea of commercial philanthropic actors		
Assigning diverse non-philanthropic labels to platforms		
Questioning impact and novelty of platforms		
Diverging on possible alternatives to platforms' integration		
Promoting flexible definition of philanthropy	Using definitional ambiguity in favour of membership expansion	
Promoting diverse organizational vehicles beyond foundations		
Framing platforms as complementary philanthropic actors		
Identifying with flexible definition of philanthropy	Exploiting definitional ambiguity to claim field membership	
Responding to philanthropy's limitations and contradictions		
Justifying a distinctive (non-foundation) form		
Identifying complementarity with philanthropic foundations		
Supporting platforms through diverse resources	Generating mutual reinforcement through membership expansion	3. Demonstrating comparative reinforcement
Providing credibility and visibility to platforms		
Feeding internal innovation thanks to platform collaborations		
Gaining visibility thanks to platform collaborations		
Endorsing bridge-building role		
Benefiting from foundations' financial support	Taking advantage of field resources through collaborating with foundations	
Benefiting from foundations' credibility and visibility		
Benefiting from foundations' networking		
Refusing to collaborate with platforms	Enduring closed collaborations	
Struggling to diffuse foundation-based platformization project		
Struggling to build systematic collaborations among foundations		
Failing to achieve unified collective representation		

(Continues)

Table IV.   (Continued)

First order codes	Second order codes	Aggregate dimensions
Proposing a multi-layered definition of philanthropy	Acknowledging platforms as distinctive members	4. Facilitating shared buy-in
Creating a distinctive philanthropic sub-designation for platforms		
Making platform tools available to broader group of foundations	Offering collaboration opportunities to broader group of foundations	
Developing joint projects with broader group of foundations		
Acknowledging platforms as complementary philanthropic actors	Conceding selective endorsement of and collaboration with platforms	
Differentiating among platforms		
Connecting platforms with other philanthropic foundations		
Developing experimental collaboration with platforms		

Note: White = expander incumbents; light grey = protector incumbents; dark grey = platforms.

FINDINGS

The findings are organized according to the four aggregate dimensions that describe the successive mechanisms through which expansive boundary work gradually took precedence over protective boundary work, enabling membership expansion. Table VI summarizes how each mechanism connects pivotal changes in the social and symbolic boundaries of the field, as detailed in the research context.

Affirming Divergent Expansive Posture

The development of platforms on the fringes of the philanthropic field between 2014 and 2016 (t1) challenged the social boundary of philanthropy because it threatened to divert citizens' donations and other philanthropic resources away from foundations. In turn, such a threat directly questioned the field's symbolic boundary, challenging the model of the foundation as the exclusive, top-down model to conduct philanthropy. In contrast with the majority of incumbents who first ignored and later rejected platforms because they did not fully align with philanthropic membership criteria, three expanders affirmed an expansive posture that fundamentally diverged from the consensus of the broader group of incumbents. Such distinctive posture was enabled by two ways in which these incumbents leveraged their specific emergence trajectory from a 'non-philanthropic' parent organization: their capacity to scrutinize broader societal trends beyond the boundaries of the philanthropic field and, hence, their ability to notice the added value of platforms and make them visible in the field.

Scrutinizing societal trends through external stakeholder engagement. Thanks to their emergence from a non-philanthropic parent organization, expanders appeared to be better connected with trends unfolding in other fields. Expanders leveraged this field-spanning posture to claim a distinctive positioning with regard to the other foundations:

Table V. Illustrative quotes

1. Affirming divergent expansive posture

Expanders: Scrutinizing societal trends through external stakeholder engagement

Connecting with non-philanthropic emergence roots	Since 1930, the [Citizenship] insurance cooperative […] has devoted part of its profits to social causes. […] The [Citizenship] Foundation was established in 2000 […] and undertakes various projects both in Belgium and at the European level. (Citizenship Website, viewed on April 2019)
Integrating stakeholders from diverse societal domains in decision-making processes	We have an advisory board. These are mainly journalists, researchers, and individuals working in NGOs who help us identify future themes, what is important, and where we should focus. […] The network of experts changes depending on the themes. (Interview 13, Citizenship Foundation, 2019)
Contributing to field-spanning societal challenges	We contribute to a better society [as] an actor of change and innovation serving the public interest and social cohesion. (Big Foundation website, viewed on April 2017)

Expanders: Making platforms visible in the field

Becoming acquainted with platformization trends and actors	Today, there is an awful tendency towards regulation, imposing frameworks on the world, and categorizing everything. This is why we wanted to conduct this research [on new platforms] to challenge these frameworks and categories. It's encouraging! Ultimately […] we need a new perspective. (Event 3, Nextdoor Bank, October 2018)
Diffusing platformization trends and actors to other foundations and collective networks	We compile information collected by our various partners into reports and publications, which we make available to everyone. (Big Foundation website, viewed on April 2017)

2. Leveraging definitional ambiguity

Protectors: Struggling to define common ineligibility criteria

Attempting to define common exclusive definition of philanthropy	Philanthropy is still initially the idea of giving financial means, cash rather than donations in kind or time. I know that not everyone agrees on this, but to me to call something philanthropy there must be a dimension of giving money […]. If not, it is not really philanthropy. (Interview 23, Funds4Impact, 2018)
Rejecting the idea of commercial philanthropic actors	For me it is striking that [Time2Give] chose a commercial form. […] I see young people with a business model and money to make. [It's] sold to businesses, to schools, to municipalities, etc. […] On the contrary, being a not-for-profit organization ourselves, we clearly work for the general interest. (Interview 21, Volunteering Centre, 2019).
Assigning diverse non-philanthropic labels to platforms	He has a hybrid financing model. Now, does that make him a philanthropist? No! […] He is a social entrepreneur, he is someone who instead of going to work in the Big Five, decided to work for a social cause. (Interview 10, YouthPower, 2018)

(Continues)

Table V.   (Continued)

Questioning impact and novelty of platforms	I am quite sceptical on these [platforms]. When we look at what is accumulated through this kind of […] small donations, it doesn't mobilize impact in the same well-targeted way as foundations do. (Interview 23, Funds4Impact, 2018)
Diverging on possible alternatives to platforms' integration	The entire sector […] continues to disperse itself on this issue [platforms], when we could already converge upstream on a certain number of things […] There are very few people who are even aware of this. (Interview 5, Transformative Foundation, 2018)

Expanders: Using definitional ambiguity in favour of membership expansion

Promoting flexible definition of philanthropy	For me, philanthropy is very broad, […] there is giving, volunteering, people who create their foundation, etc. All of this, for me, is part of philanthropy […] [with] the common denominator of private means donated to the general interest […] It is in everyone's interest of being as inclusive as possible. (Interview 2, Big Foundation, 2018)
Promoting diverse organizational vehicles beyond foundations	I don't agree when people say that the first thing that comes to mind is foundations. That's […] counterproductive. I don't talk about foundations anymore; I talk about philanthropy – real philanthropy. Foundations are just one part of philanthropy. Foundations cannot claim that philanthropy is theirs. […]. We organize the 'Philanthropy works' event, not the 'Foundations work'; that's the best proof. (Interview 2, Big Foundation, 2018)
Framing platforms as complementary philanthropic actors	The large foundations and the small platforms, I think these are complementary […], and this dynamic will lead to mutual reinforcement. (Interview 3, Big Foundation, 2018)

Platforms: Exploiting definitional ambiguity to claim field membership

Identifying with flexible definition of philanthropy	I think we have to call a spade a spade: philanthropy is giving back to others what we have received. That's it. Now, it's no longer reserved for certain people. Anyone can do it and we need to reclaim the word. (Focus Group, Biz4Good)
Responding to philanthropy's limitations and contradictions	My speech at the [Big] Foundation was in the spirit of trying to get them to distribute their money […] in a more participatory, more transparent way. I think that it is changing little by little, but there is still work to be done. (Interview 36, SolyNet, 2019)
Justifying a distinctive (non-foundation) form	We could have […] created a non-profit organization. But the problem with a non-profit organization is that it limits all that you can do with your money. […] If we really wanted to be serious, we had to become a public limited company. (Interview 32, GivingWhizz, 2017)
Identifying complementarity with philanthropic foundations	Our ambition is not to revolutionize things, it is to be complementary to other sources. So, if we can be complementary and help, contribute our stone to the building, yes we have won. (Focus Group, Money&More)

(Continues)

Table V.　(Continued)

3. Demonstrating comparative reinforcement

Expanders: Generating mutual reinforcement through membership expansion

Supporting platforms through diverse resources	The goal is to try to do a small crowdfunding project, which we will finance with them [SolyNet] to see if it works […] when you don't have the network. It really has to be something where we can involve the community, but it also gives us more chance to make the project sustainable. (Interview 13, Citizenship Foundation, 2019)
Providing credibility and visibility to platforms	[Platforms say:] 'Give us the [Big] Foundation logo, it strengthens us, it gives us credibility.' It's good that we are still perceived like that. And then, there is the tax certificate, too, which allows deductibility for possible donations. (Interview 2, Big Foundation, 2018)
Feeding internal innovation thanks to platform collaborations	We will be very happy to learn from these people, from what they do to see if we can contribute in one way or another, if we can strengthen each other. We must be open to these innovations, we must be open to new ideas, we must be open to learning and we must see what we can do together with these new actors. (Interview 4, Big Foundation, 2020)
Gaining visibility thanks to platform collaborations	Through the project and the event that followed (October 2018), the [Nextdoor Bank] has a 'visibility objective on the map of philanthropy in Belgium' (Meeting Minute August 2017)
Endorsing bridge-building role	The initial founder of [Time2Give] came to see me. Two weeks later the founder of [Two Days] also came to see me. I put them together. I told them: listen, you're doing the same thing, do something together. […] So, this is bridge building. (Interview 2, Big Foundation, 2018)

Platforms: Taking advantage of field resources through collaborating with foundations

Benefiting from foundations' financial support	The first time I saw the [Big Foundation], I told them that I needed help for this project, that it could be useful to them. And after a year of discussion we created the fund. (Interview 37, HelpPooling, 2019)
Benefiting from foundations' credibility and visibility	Becoming a partner [of the Big Foundation] interests me much more than receiving 10,000 euros from them. […] Once we have a partnership, it's thousands of associations, it's visibility, it's credibility. It's much more promising. (Interview 31, Time2Give, 2019)
Benefiting from foundations' networking	Being in contact with [the Big Foundation] helps me a lot. Because they have a crazy network, with super strong entrepreneurs [who] help me in my day-to-day management. […] It's a whole little world. (Interview 36, SolyNet, 2019)

Protectors: Enduring closed interactions

Refusing to collaborate with platforms	And finally, the [Volunteering Centre] said: 'no, we don't want to work with you because you work with companies.' As a platform, we pay ourselves, so there is an economic model behind it, we make [users] pay for our interventions. And so, it was the idea to say: you make money on the back of volunteers. […] They have a very sclerotic, 'grandparent' vision of volunteering. (Interview 31, Time2Give, 2019)
Struggling to diffuse foundation-based platformization project	[Tango] seems to be brain dead in my view (Interview 5, Transformative Foundation, 2018)

(Continues)

Table V. (Continued)

Struggling to build systematic collaborations among foundations	If you want to work together, you have to know what the others are doing, be open about who are the partners. And most of them do not want to share that. [Other foundations] don't want to say to whom they give the money. (Interview 17, GlobalizAid, 2019)
Failing to achieve unified collective representation	To have a strong philanthropic sector, there is no secret, you have to invest in your sectoral organization. I think one of the reasons why foundations invest so little in the association that represents them is that […] the quality of the services we can offer is limited by the budget. […] As long as we don't put more money in, we lack expertise. (Interview 20, Association, 2021)

4. Facilitating shared buy-in

Expanders: Acknowledging platforms as distinctive members

Proposing a multi-layered definition of philanthropy	When we engage in advocacy for philanthropy, we need an inclusive definition to avoid opposition and simplify our discourse. However, when we discuss with other foundations, we can be more specific. (Interview 4, Big Foundation, 2020)
Creating a distinctive philanthropic sub-designation for platforms	They've brought a breath of fresh air […] that will last and is different from 'I work all my life, I have capital and then I create a foundation' […] Here it is something else, it is 'I am a philanthropic entrepreneur, I am doing good with my commitment, but I also want to earn a living'. (Interview 4, Big Foundation, 2020)

Platforms: Offering collaboration opportunities to broader group of foundations

Making platform tools available to broader group of foundations	Our platform is now used by [YouthPower]. (Time2Give website 22, viewed on November 2022)
Developing joint projects with broader group of foundations	[Growfunding] signed our open letter to the government for the maintenance of a 60% tax reduction on donations in 2021. (Fundraising Centre website, viewed on November 2022)

Protectors: Conceding selective endorsement of and collaboration with platforms

Acknowledging platforms as complementary philanthropic actors	Probably both are needed. These more spontaneous, more direct approaches […] have the advantage of flexibility. So, I think there is a complementarity between the two approaches. It puts pressure on the old players to demonstrate their added value. (Interview 5, Transformative Foundation, 2018)
Differentiating among platforms	There is still a distinction to be made regarding the purpose of the project. The purpose should not hide something that is not philanthropic. (Interview 11, YouthPower, 2021)
Connecting platforms with other philanthropic foundations	[AdvertRaising] came to us. But we didn't support them, not because we didn't find the project interesting but simply because they didn't fit into our priority […] themes. From the moment we don't have the possibility to support [platforms] […], we always direct [them] towards other philanthropic actors. (Interview 11, YouthPower, 2021)
Developing experimental collaborations with platforms	We try to collaborate. Typically, [SolyNet] and then others, we finally got together and we made a small consortium of the different crowdfunding platforms. […] So we really try to work together. (Interview 12, Job4All, 2019)

Table VI. Overview of findings

Overarching mechanisms	Expanders	Platforms	Protectors	Connection of boundaries
Affirming divergent expansive posture	Scrutinizing societal trends through external stakeholder engagement Making platforms visible in the field	/	/	Social (T1) → Symbolic (T2)
Leveraging definitional ambiguity	Using definitional ambiguity in favour of membership expansion	Exploiting definitional ambiguity to claim field membership	Struggling to define common ineligibility criteria	Symbolic (T2) → Social (T3)
Demonstrating comparative reinforcement	Generating mutual reinforcement through membership expansion	Taking advantage of field resources through collaborating with foundations	Enduring closed collaborations	Social (T3) → Symbolic (T4)
Facilitating shared buy-in	Acknowledging platforms as distinctive members	Offering collaboration opportunities to broader group of foundations	Conceding selective endorsement of and collaboration with platforms	Symbolic (T4) → Social (T5)

It's different, obviously, the impetus. It's a foundation that doesn't stem from the wealth of a great philanthropist. This is also what makes us unique; we are a foundation funded by society, so we are accountable to society. […] We are a foundation, but at the same time, we are a foundation like no other. (Interview 1, Big Foundation, 2018)

Expanders' capacity to scrutinize societal trends was also facilitated by their multi-stakeholder governance structures emerging from their non-philanthropic roots. Through advisory committees and boards of directors integrating stakeholders from other fields (for example, cooperatives or social finance), expanders were better able to keep up with new societal trends. This enabled them to identify the emergence of platforms before the other foundations, as illustrated by the study led by the Big Foundation and the Nextdoor Bank. The interest in platforms as potential philanthropic actors also relied on a more pragmatic, open vision of philanthropy induced by the expanders' multi-stakeholder governance, diverging from the narrower focus of foundations created by an individual or a family.

> We bring stakeholders concerned by the same issue to the table, including researchers and field actors, so they can share their experiences and visions. The goal may be to improve understanding of the issue, to reflect on shared solutions, or to pool best practices. (Big Foundation website)

Making platforms visible in the field. After identifying and considering platforms based on their field-spanning posture, the three expanders reached out to the main platforms to get to know them better. Expanders viewed them under 'the great denominator of philanthropy', contributing to 'ensuring that the general interest progresses' (Interview 2, Big Foundation, 2018). They identified the model and tools of platforms as complementary to their own philanthropic action and acknowledged that platforms brought 'a wealth of new skills, new energy and new visions.' (Interview 1, Big Foundation, 2018). Therefore, they publicly endorsed platforms as 'philanthropic', while acknowledging that they were 'not a classic philanthropic foundation, but still a sort of philanthropist' (Interview 13, Citizenship Foundation, 2019). Concretely, expanders showcased platforms on their websites and social media and regularly invited them to philanthropy events. For example, early 2017, the program of 'Philanthropy works!' advertized a session on how to 'integrate [platforms'] amazing potential in order to better define philanthropic action, better grasp what social causes to support, and optimize strategies' (Event Doc 2). Retrospectively, expanders viewed the 2017 'Philanthropy works!' event as instrumental in bringing platforms in the spotlight and making them difficult to reject, let alone ignore, by the broader group of foundations:

> The goal of this event was to say: friends, digital is here. And we succeeded, reaching numerous philanthropists […], although we felt there would be some delay in developing [their] awareness. (Interview 4, Big Foundation, 2020)

Yet, expanders quickly realized that bringing the spotlight on platforms as potential philanthropic actors raised strong contestation among the broader group of foundations. For example, at the event 'Philanthropy works!' in 2017, a foundation manager stood up and asserted that 'platforms cannot be viewed as philanthropy: platform founders are selfish while philanthropy is all about altruism' (field notes). When expanders organized a specific event on the potential of social-mission platforms (Event 3) 'to show that there are other ways to serve the general interest than creating […] a foundation' (Interview 2, Big Foundation, 2018), they witnessed similar concerns from other foundations that advocated to reject platforms.

In sum, the expanders' attention to and engagement with peripheral actors on the social boundary inevitably challenged the symbolic boundary of philanthropy, as it questioned the membership criteria aligned with foundations allocating resources in a top-down approach. Challenging the symbolic consensus raised opposition from protectors, prompting discussions about what defines membership in philanthropy (t2). Expanders thus realised that explicitly broadening membership criteria to make platforms potentially eligible (symbolic boundary) would be necessary to legitimise further collaborations with these platforms (social boundary).

Leveraging Definitional Ambiguity

Protectors: Struggling to define common ineligibility criteria. Facing the development of platforms and the expanders' willingness to include them as field members, protectors reflected on how to resist such inclusion by setting clearer common criteria to define philanthropy's membership. Yet, in addition to the lack of legally defined criteria, protectors also disagreed on whether philanthropy should be restricted to financial resources, or also include the provision of non-financial resources such as time (i.e., volunteering). Moreover, while protectors agreed that philanthropic actors should endorse a 'non-commercial' organizational form, what this precisely entailed was unclear. Protectors associated 'non-commercial' with a foundation form, or at the very least a non-profit form with an explicitly disinterested aim. Yet, they rejected not only the platforms that had adopted a for-profit legal form, but also those that had adopted a non-profit legal form, suspecting them of hiding a commercial aim: 'What is certain is that they do not have the legal form of […] foundations, so they are normally commercial companies. Or perhaps some of them claim they have a social purpose, I don't know, but in real they do not have the same objectives or the same history.' (Interview 19, Association, 2018). Protectors also questioned platforms' impact: 'just because it's digital doesn't mean it's going to bring about transformation' (Interview 8, Family Foundation, 2019). They further contested platforms' innovative nature, criticizing their lack of consideration for what already existed in the philanthropic landscape. As platforms' features did not match how protectors perceived philanthropy, the latter dismissed platforms as 'non-philanthropic' and tried to suggest alternative affiliations, yet using labels in a dispersed manner:

> They are social entrepreneurs looking for funds to develop their platform or pay themselves. From the moment they need funds that are not theirs to develop something, they cannot be philanthropists. (Interview 23, Funds4Impact, 2018)

Instead of membership expansion, protectors advocated for the integration of new practices to 'professionalize the philanthropic sector' (Interview 8, Family Foundation, 2019). For example, witnessing the development of platforms, one foundation, Job4All, launched its own platform-based grant-making tool in 2015 and invited other foundations to participate in its development. Called Tango, this platform was meant to provide crowdfunding solutions for existing philanthropic projects carried out by foundations (website 8). This example illustrates protectors' willingness to implement platformization practices within the framework of traditional philanthropy, that is, limited to foundations allocating resources in a top-down approach.

However, protectors struggled to find concrete grounds on which to clearly exclude platforms from philanthropy. Regretting that 'the 2002 legal framework was too vague' (Interview 8, Family Foundation, 2019) and allowed for multiple interpretations of what it means to be a philanthropic actor, protectors did not manage to organize a coordinated response to expanders' willingness to integrate platforms in the philanthropic field. Several interviewees complained about such a lack of collective spirit:

There are not many foundations who think about the evolution of philanthropy. For [other foundations] the foundation is a place where you defend your interests. Whereas we are here not only to defend our interests but above all to think about the evolution of philanthropy. (Interview 6, Transformative Foundation, 2019)

Expanders: Using definitional ambiguity in favour of membership expansion. Facing protectors' reluctance to welcome platforms in the philanthropic field, expanders worked to favour an inclusive definition of philanthropy. First, expanders sought to delegitimize the exclusive approach of the other incumbents that focused on allocating resources through foundations. Expanders suggested that opposing the various philanthropic approaches or excluding some of them was 'anti-philanthropic' (Interview 18, Nextdoor Bank, 2018) and 'counter-productive' as it 'deprived philanthropy of additional forces.' (Interview 4, Big Foundation, 2020).

Because of their connection with different actors involved in addressing societal challenges, they also advocated for a multiplicity of organizational vehicles to conduct philanthropy, beyond the well-established foundation model. To do so, they exploited the ambiguity in membership criteria enabled by the vague legal definition and advocated for a broad vision of philanthropy relying on different complementary models: 'a mille-feuille with all the layers coming on top of one another and each layer being interesting,' (Interview 1, Big Foundation, 2018). While expanders did not convince protectors of the need for a more diversified philanthropic landscape, they demonstrated that philanthropy had never been precisely defined as exclusive to foundations and that membership criteria thus enabled for multiple interpretations. Therefore, expanders leveraged definitional ambiguity to frame the participation of platforms at the very least as an issue to be debated among incumbent foundations.

Platforms: Exploiting definitional ambiguity to claim field membership. Expanders' inclusive definition of philanthropy resonated with platforms themselves, which were interested in connecting with the philanthropic field but never intended to embrace the traditional, foundation-based approach nor compete with incumbent foundations. They concurred with expanders that platformization was a needed solution to the perceived limitations and contradictions in foundations' practices:

Digital tools [...] are changing everything [and] can no longer be ignored. Foundations need to distribute their money in a [...] more participatory, more transparent way. And that's the beauty of our platform. (Interview 36, SolyNet, 2019)

Instead of positioning themselves as competitors, platforms worked together with expanders by reassuring the broader group of incumbents that they were 'not trying to reinvent the wheel' but aspired 'to help amplify existing initiatives' (Interview 28, Colibris Booster, 2019) and 'be complementary to others' (Interview 27, Money&More, 2017). In line with expanders' claims, they suggested that a broader understanding of philanthropy would help identify the added-value of different types of actors, while opposing the different models would be counter-productive:

I believe we can all have a positive impact and if we restrict ourselves solely to certain categories of people, we exclude a whole part of the economy. I have the impression that rather than creating a divide and pitting the good guys against the bad guys, it might be in everyone's interest to say: how can each of us do their bit? (Biz4Good, Focus Group, 2017)

In sum, since on the symbolic boundary front expanders considered platforms as philanthropic actors, protectors failed to impose their exclusive definition, and platforms themselves started to become interested in field membership, there was no formal obstacle against collaborations between expanders and platforms, which started to flourish around 2017 and 2018 (t3). By actively reframing philanthropy's membership criteria to make them more inclusive, expanders laid the ground for legitimizing the expansion of the field's social boundary.

Demonstrating Comparative Reinforcement

Expanders: Generating mutual reinforcement through membership expansion. Through different types of collaborations (t3), expanders supported the development and inclusion of platforms, which in turn enabled to increase the resources, digital expertise and innovative dimension of expanders. In some cases, expanders integrated platforms as partners in existing projects, offering complementary resources such as crowdfunding. For example, from May 2019 on, the Citizenship Foundation asked SolyNet to give fundraising advice to its beneficiary organizations (Website 10; Social media 5; Social media, 15), justifying the collaboration as follows: 'The advantage of suggesting our beneficiaries to launch a crowdfunding campaign alongside our funding is that, if the campaign succeeds, the project is more rooted locally and our funding becomes more long-lasting' (Interview 13, 2019). In other cases, expanders established connections among platforms and acted as intermediaries between platforms and other incumbents. For example, the founders of Time2Give met via the Big Foundation and managed to operate at a national scale thanks to this matchmaking. Expanders also adapted their support tools for platforms, for example through 'hosted funds' (Website 2):

I truly believe in the model of [HelpPooling]. So, I told them: 'listen, why don't you create a hosted fund within the foundation, this will help you develop the project.' This is a first for us, we had never done this before. (Interview 2, Big Foundation, 2018)

Platforms: Taking advantage of field resources through collaborating with foundations. The social boundary expansion pursued by expanders was consolidated by platforms' enthusiasm to embrace collaboration and leverage their growth opportunities:

The first time I met the Foundation, I told them that our platform could benefit them. And after a year of discussions, we created the 'hosted fund'. […] The Foundation likes our platform because they think it's a great tool. And now, thanks to the Foundation's network, we can meet many new users for our platform. (Interview 37, HelpPooling, 2019)

Benefiting from expanders' support and networks helped platforms enhance their capacities, getting access to the field's resources and its social relations, thereby contributing to reshaping the social boundary. Emboldened by their successful collaborations with expanders, platforms also tried to reach out to protectors, whom rejected their proposals and preferred collaborations among themselves.

Protectors: Enduring closed collaborations. Protectors' inability to challenge expanders' collaborations with platforms did not imply that they legitimated platforms' access to field resources. As mentioned, to try and limit platforms' progress within philanthropy, protectors systematically refused collaboration requests. For example, in May 2018, the Volunteering Centre refused to collaborate with Time2Give because they saw them as a direct threat, even though the platform had been endorsed by the Big Foundation:

> They were surprised we refused to collaborate with them, but they did not even come and discuss with us before building their platform. […] It's not easy to see another player come in with a different vision, because it means that this vision will compete with ours and that ours could potentially lose value. (Interview 21, 2019)

Protectors reacted to expanders' collaborations with platforms by developing 'defensive' collaborations among themselves, either building on existing initiatives, such as the peer-learning group organized by the Transformative Foundation (Publications 17 and 18) or creating new collaboration opportunities, such as 'spaces to discuss and exchange around various practices' (Family Foundation, Publication 22). Tango, the platform-based tool created by the Job4All Foundation in 2015, aimed to be another of these collaborative spaces for foundations. However, while most protectors initially agreed to support social-purpose projects through this tool, it quickly appeared that such participation was mainly symbolic and did not bring the involvement and resources that had been expected:

> In the partners we see very different levels of involvement. There are some who are […] never there. I think there are some who wanted to be part of the project in a more symbolic way. (Interview 12, Job4All Foundation, 2019)

In 2018, even if the tool still existed, it was considered 'brain dead' (Interview 5, Transformative Foundation, 2018) by most protectors. Moreover, the Big Foundation and the Citizenship Foundation, which had gained in importance and expertise thanks to their collaboration with platforms, declined to participate in the Tango project. Reflecting the difficulties of building platform practices among foundations only, the project was abandoned in 2020. In parallel, protectors tried to reinforce foundations' collective networks, as illustrated by the Association's president who called its members to 'stimulate interactions' and 'better defend the sector' during the network's General Assembly in March 2019 (Event 5, field notes). However, the Association admitted that it struggled to leverage a collective sense of belonging, since 'everyone is reluctant to share information' (Interview 19, Association, 2018).

Although they were a majority, the reaction of protectors, both foundations and collective networks, was too weak and dispersed to fundamentally challenge expanders' efforts to pursue membership expansion. While protectors endured closed interactions following established patterns, expanders and platforms reinforced one another through effective collaborations that seized the trend of platformization. Moreover, by leveraging their collaboration with platforms to develop innovative practices, expanders could showcase successful examples to demonstrate the added value of platforms in fostering more participative philanthropy. Therefore, successful expansion of the social boundary gave them leverage to claim further expansion of the symbolic boundary. Eventually, protectors began to accept platforms as philanthropic actors, a shift driven by expanders' collaborations with these platforms, which led to a renegotiation of membership criteria (t4). This renegotiation was formalized in a bill issued by Belgian authorities in September 2019, granting platforms the right to issue certificates for tax-deductible donations, thereby recognizing their philanthropic nature.

Despite this major achievement, expanders feared that some protectors' enduring resistance to platforms might eventually threaten incumbent foundations' collective identity and lead to field fragmentation, which could be detrimental to all field members. For example, when the Big Foundation learned about the Volunteering Centre's refusal to collaborate with Time2Give, they told them: 'We would like to support your platform more, but we don't want to antagonize [the Volunteering Centre]. Politically, it's complicated.' (Interview 31, Time2Give, 2019). This prompted expanders to then work to tone down their expansive impulse to actively facilitate the buy-in of protectors.

Facilitating Shared Buy-In

Expanders: Acknowledging platforms as distinctive members. Although membership expansion was to a certain extent already achieved de facto at both the social (t3) and symbolic (t4) levels, expanders deployed a fourth mechanism to finish rallying protectors and legitimize membership expansion as an orientation that would be collectively embraced by all foundations and thus endure. To appease protectors' resistance, they started using the distinctive label of 'philanthropic entrepreneurship' to designate platforms (Event Doc 4, program of 'Philanthropy works!'). By associating the field adjective ('philanthropic') to a noun external to the field vocabulary ('entrepreneurship'), expanders continued to legitimize platforms as field members but distinguished them from philanthropic foundations through a specific sub-category. Expanders hoped that using a distinct qualifier would appease the most sceptical protectors and ultimately facilitate generalized collaborations: 'It doesn't matter if they say, "This isn't exactly the same type of philanthropy"; what matters is that they find great ways to collaborate with these new players.' (Interview 4, Big Foundation, 2020). They expected that using this sub-category would formalize the symbolic boundary extension in a way that suited not only protectors but also platforms, which had never intended to become similar to foundations.

Platforms: Offering collaboration opportunities to a broader group of foundations. In parallel, platforms started extending their collaboration offers beyond the three expander

incumbents, with whom they had developed multiple collaborations. To do so, they made their platform tools available to protectors, as in the case of Time2Give (Website 22), or they even adapted these tools to the specific needs of foundations, as in the case of GivingWhizz (Website 25). Platforms also became involved in collective projects including those developed by collective networks. For example, in 2021, HelpPooling joined the Association's membership. When in 2022 the Association launched a broad training program for its members, this platform contributed to giving training sessions that 'introduced members to the use of online platforms to manage calls for projects.' (Publication 32). By doing so, platforms complemented expanders' symbolic opening with concrete social opportunities for protectors.

Protectors: Conceding selective endorsement of and collaboration with platforms. Welcoming the expanders' suggestion of a sub-category for platforms and considering the opportunity to benefit from the same mutually beneficial collaborations with platforms as those developed by expanders, protectors began to symbolically acknowledge platforms' participation in the philanthropic field. For example, at the end of 2020, the Volunteering Centre – which had previously refused collaboration with platforms – started to display several of them on its social media (Social media 8). Witnessing the added value of platforms, protectors began recognizing that platforms could complement their traditional philanthropic practices: 'they might stimulate micro-initiatives that address specific needs for specific groups of people [and] make philanthropic action more inclusive' (Interview 22, 2021).

In parallel, protectors began to differentiate among platforms based on how close they were from what protectors considered as a truly philanthropic, that is, non-commercial model. Building on expanders' sub-category proposition, protectors endorsed the most compatible, less commercial platforms as 'philanthropic entrepreneurs.' To do so, they paid much less attention to the platforms' legal form than to their, disinterested, 'non-competing' posture complementing foundations' actions. In contrast, platforms that showed a more commercial posture through competing with existing foundations were rejected:

> You need to make a distinction. [Some platforms] are like social entrepreneurs. But platforms like [AdvertRaising and SolyNet] are philanthropic entrepreneurs, because [they] serve as an interface connecting all sorts of initiatives looking for financial support and all sorts of citizens wondering how they can be useful. (Interview 11, YouthPower Foundation, 2021)

Therefore, protectors advocated for a selective approach that excluded platforms perceived as too commercial and competitive, which was the case in particular for Biz4Good, SkillUp and LinkedUp. In 2019, in its response to a bill on online donations issued by Belgian authorities, the Fundraising Centre reflected such selective endorsement: 'While the bill will enable a greater number of platforms to offer their services, it does not grant carte blanche to all operators.' (Publication 31). Interestingly, the platforms that had been endorsed contributed to the ongoing expansion of the field's symbolic boundary. For example, when, in 2021, the fundraising centre wrote

an open letter to the government to advocate for the renewal of the right to issue tax deductibility certificates, SolyNet was among the signatories, symbolizing the platform's contribution to and acceptance within the philanthropic field (website 18, Fundraising Centre).

Such symbolic acceptance had direct implications on the social boundary front: following their selective endorsement of platforms, protectors started collaborating with some of them or acting as intermediaries between certain platforms and other incumbents. Importantly, the collective networks also began encouraging their members to use the tools offered by platforms, which appeared as more effective solutions to overcome philanthropy's limitations than what collective networks were able to develop. For example, the Fundraising Centre authorized their members to raise funds through platforms such as GivingWhizz, ensuring donors that the platform complied with the rules of the Fundraising Centre and could therefore grant donors tax deductibility certificates (website 18). The Association also encouraged its members to 'compare the advantages and disadvantages of different platforms to see which type of platform works well according to their needs.' (Interview 20, Association, 2021). In contrast, the three platforms that were not acknowledged by the broader group of foundations (i.e., Biz4Good, SkillUp and LinkedUp) all went bankrupt between 2020 and 2021, demonstrating that the lack of symbolic and social inclusion disabled them from surviving in the philanthropic field.

Overall, expanders' evidence-based demonstrations of the platforms' added value and proposal of a distinctive membership sub-category (symbolic boundary) incentivized protectors to selectively collaborate with those platforms that they considered as most aligned with their vision of philanthropy (social boundary). By the end of our study (t5), the eight 'non-commercial' platforms had been recognized as philanthropic members through endorsement by several foundations, recognition by the fiscal administration and membership of collective networks. As a consequence, collaborations multiplied between platforms and foundations beyond the group of expanders. Although differences of visions among incumbent foundations remained to a certain extent, none of them contested the relevance of integrating social-mission platforms into the field as a way to adapt philanthropy to the platformization trend. By successfully piloting the membership expansion process, expanders improved their position in the field, becoming pioneers of platformized philanthropy practices and strengthening their resources through successful collaborations with platforms.

DISCUSSION

Our study aimed to understand the process through which a minority of incumbents can bring about membership expansion despite initial divergence among incumbent positions on what boundary work strategy to undertake when faced with the arrival of peripheral actors. Four core mechanisms emerged from our findings to explain how a minority of incumbents gradually rallied the majority of incumbents even when these more numerous incumbents initially opposed such expansion. Drawing on our findings, we theorize a model of membership expansion as the result of a contested, multi-actor

process through which, despite initially diverging boundary work strategies, a few incumbents can skilfully reshape social and symbolic boundaries to enable membership expansion (see Figure 4).

Horizontally, the model illustrates how the four mechanisms enabling the achievement of membership expansion result from the interaction of expansive and protective boundary work strategies, respectively, pointing towards the right and the left. These strategies are pursued by expanders, protectors and peripheral actors (each represented by a different type of arrow). While expanders have a central role in favouring expansive boundary work (moving the model to the right), membership expansion is also enabled by the actions of the two other groups. First, the active engagement of peripheral actors amplifies each of the mechanisms. If these actors were not interested in field membership, or if they had a hostile stance aimed at capturing field resources at the expense of incumbents, expanders would be reluctant to engage in continued expansive boundary work. Second, membership expansion is facilitated by the inability of protectors to successfully oppose expanders due to the absence of both clear ineligibility criteria and a coordinated protective counter-strategy. Gradually, protectors come to support membership expansion from the moment they become convinced that this outcome is irreversible, does not threaten their identity (cf. creation of a membership sub-category for peripheral actors), and can also be beneficial for them (protector arrow evolving from left-pointing to right-pointing).

Vertically, the model shows how each mechanism connects social and symbolic boundary expansion in a specific way. As theorized in prior work (Grodal, 2018; Lamont and Molnár, 2002), the mechanisms of *leveraging definitional ambiguity* and *facilitating shared buy-in* go top-down, that is, they start from a shift in the symbolic boundary (respectively, the contestation and renegotiation of membership criteria) to enable a shift in the social boundary (respectively, first and generalized collaborations and resource exchanges with
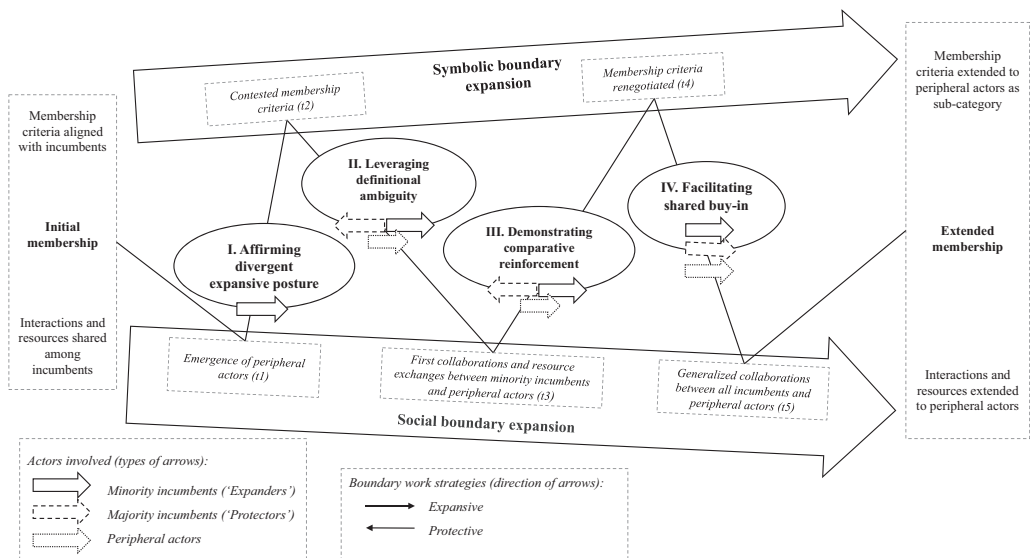

Figure 4. Process model

peripheral actors). However, the model also includes the mechanisms of *affirming a divergent expansive posture* and *demonstrating comparative reinforcement*, which conversely rely on a shift in the social boundary as a leverage to reshape the symbolic boundary (bottom-up direction). In other words, through these two mechanisms, the minority of incumbents can seize the opportunity of the integration of peripheral actors in a way that enables them to open the symbolic boundary and prevent other incumbents from successfully counter-reacting.

Our findings and model bring two contributions to the literature on field boundaries and boundary work. First, by offering a finer-grained view of how the divergence in boundary work strategies in the face of peripheral actors can be overcome by a minority of incumbents, our study extends prior literature that has often depicted incumbents as a homogeneous group converging in its efforts to either protect field boundaries (Bucher et al., 2016; Helfen, 2015) or, in rarer occasions, pursue expansion phases (Faulconbridge et al., 2023; Grodal, 2018). By emphasizing the role of divergent minority incumbents in rallying the majority and shaping the collective boundary work strategy, we suggest that incumbents' boundary work strategies may be more diverse and contested than what could appear by focusing only on their often converging outcome (Faulconbridge et al., 2023; Helfen, 2015). While disagreement and shifting power plays are natural conditions of inter-organizational relationships in any field (e.g., Phillips et al., 2000), our work shows that such divergence can be overcome in a way that does not necessarily align with the more numerous incumbents and collective networks.

Importantly, our findings show that, by doing so, minority incumbents may improve their power position and legitimacy in a field, gaining privileged access to the peripheral actors and their innovative practices, and pioneering the evolution of the field as a whole. Such benefits appear particularly relevant for incumbents that have emerged outside of the focal field. In other words, our findings show that favouring membership expansion may derive from a broader 'cross-field' positioning (Furnari, 2014; Zietsma et al., 2017) emerging from the incumbents' founding trajectories. Such distinctive positioning is instrumental to explaining why certain incumbents notice peripheral actors and envision the advantages of integrating them (De Clercq and Voronov, 2009; Greenwood and Suddaby, 2006), while most other incumbents do not.

Moreover, our theorization of the actions, reactions, and counter-reactions of two groups of incumbents and one group of peripheral actors contributes to recent work that extends the actors' configuration beyond the usual 'incumbents versus challengers' dichotomy (Klopf et al., 2024; van Wijk et al., 2013). Such 'snowball' effect triggered by minority incumbents – for example the creation of a membership sub-category by expanders as a response to protectors' need to uphold their identity – contributes to opening an 'attention space' (Cattani et al., 2017, p. 984) pressuring other incumbents to consider peripheral actors more carefully. This finding contributes to studies on the entry of new actors in established fields (Hensmans, 2003; Leblebici et al., 1991; Sauder, 2008) by showing that membership expansion does not necessarily require the homogeneous opening of boundaries by all incumbents (Grafström and Windell, 2012), nor a powerful coalition of peripheral actors (Helfen, 2015). Overall, through documenting how expansive and protective boundary work strategies relate to each other and compete in a way that gradually enables membership expansion, our findings further refine our understanding of how different

'types of boundary work are intricately intertwined in practice' and 'negotiations and mutual accommodation between groups […] are therefore inescapable to get things done' (Langley et al., 2019, p. 726; see also Faulconbridge et al., 2023).

Second, by shedding light on the interdependent role of symbolic and social boundaries in resolving divergence and enabling membership expansion, our findings and model contribute to advancing research on 'the dynamic linkages between different types of boundaries' to unveil 'how changes on one boundary reverberate elsewhere' (Langley et al., 2019, p. 729). While prior work suggests that symbolic boundary shifts only affects social boundaries when they are 'widely agreed upon' (Lamont and Molnár, 2002, p. 168), we show that even incomplete and contested symbolic shifts have social repercussions and that, conversely, a social boundary shift can be leveraged to reshape the symbolic boundary. In particular, we further enrich understanding of the reciprocal influence of work on social and symbolic boundaries (Grodal, 2018) by showing how a minority of incumbents may seize the contradictions between symbolic and social boundaries to generate de facto expansion. Therefore, contradictions between boundaries are not necessarily detrimental to incumbents and exploitable only by peripheral actors to enter the field (Grodal, 2018). Instead, they can be strategically exploited (or even intentionally created) by certain incumbents, reshaping and re-aligning boundaries in a way that advances membership expansion.

Overall, by emphasizing how symbolic and social boundaries can be bridged through skilful expansive boundary work, we also advance work that sheds light on the role of boundaries in enabling field evolution (Zietsma et al., 2017; Zietsma and Lawrence, 2010). Indeed, our theorization of membership expansion as the outcome of a contested process echoes the idea of 'provisional' micro settlements (Cloutier and Couture, 2024; Reinecke et al., 2017), that serve as 'a template for action' (Feront and Bertels, 2021, p. 1138) with regard to an external challenge – in this case, the development of peripheral actors. Such template, however, is likely to be fragile and therefore temporary. Indeed, as membership expansion increases the diversity of actors in the field, provisional settlement based on expansion leaves room for future field evolution. On one hand, the expansion of symbolic and social boundaries opens a space for incumbents to undertake other forms of work, such as practice or identity work (Patvardhan et al., 2015; Zietsma and Lawrence, 2010), to adapt to broader societal trends. On the other hand, it sets a precedent: some peripheral actors that are perceived as most divergent from incumbents' collective identity may first be excluded from membership expansion but become the seeds of future field evolutions (Hehenberger et al., 2019).

Our findings and contributions are influenced by two boundary conditions, which also offer opportunities for future research. First, with its long history and the recursive emergence of peripheral actors challenging its meanings and practices, philanthropy displays characteristics of established fields that have turned into issue fields following contested episodes (Wooten and Hoffman, 2017), as observed in the forestry (Zietsma and Lawrence, 2010) or chemical industries (Hoffman, 1999). Unlike in fields structured around the exchange of specific goods or services (Bucher et al., 2016; Faulconbridge et al., 2023), in issue fields incumbents' identity and field boundaries are more ambiguous and permeable (Zietsma et al., 2017). Under such conditions, social and symbolic boundaries are likely to be more 'elastic' (Grodal, 2018, p. 813)

and incumbents will hold multiple potential interpretations on appropriate actions to undertake (Furnari, 2018). In this context, membership expansion could be more likely to occur than in established exchange fields, where incumbents are likely to unanimously perceive peripheral actors as a competitive threat. Future research could examine and compare whether and how boundary work strategies are more or less diversified and expansion-driven in different types of fields and how the evolution of a given field affects such diversity of approaches.

Second, our case is characterized by a configuration in which incumbents' collective networks and membership criteria were not regulated through strong field governance. As a result, incumbents suffered from a lack of cohesion and clarity in terms of what exactly binds them together. Yet, in other field, collective networks may strongly consolidate incumbents through enforcing precise membership criteria (Buchanan and Barnett, 2022; Vermeulen et al., 2007). This will likely lead incumbents to offer a united front when facing the arrival of peripheral actors. Likewise, as initially explained, our study focused on peripheral actors that do not necessarily claim field membership and do not aim to outcompete incumbents. In the case of more pro-active, well-organized 'challengers', incumbents would more likely and unanimously perceive them as a threat (Edman and Arora-Jonsson, 2022) and converge to adopt protective boundary work. Therefore, future research could examine the interactions between and outcomes of diverging boundary work strategies in fields characterized by varying configurations of incumbents and different types of outsiders.

Overall, considering these limitations and boundary conditions, we expect that our findings and contributions will pave the way for research that deepens the understanding of how incumbents manage diverging boundary work strategies and how such processes shape field boundaries, membership and trajectories.

CONFLICT OF INTEREST STATEMENT

None.

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