Augmented role identity saliency of CSR in corporate heritage organizations

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ABSTRACT

Examines senior managers cognitions of CSR augmented corporate role identity in three, nascent, heritage organizations. The findings revealed CSR augmented role identity to be valuable in organizational, social, and spatial contexts. In specifying the significance of CSR as an augmented role identity, this was attributable to three qualities: community (organizational participation in community development), responsibility (organizational concern with societal and national concerns), and utility (organizational mindfulness of demonstrable national and economic efficacy). Senior managers found a CSR augmented role identity to be meaningful because it instilled their organizations with a distinctiveness beyond their core business purposes as financial institutions. Given the above insights, managers of corporate heritage organizations should uncover their organization's augmented identities; should appraise their value and importance; and should demonstrate on-going stewardship of the same. In particular, managers of corporate heritage organizations should recognize that a CSR augmented role identity can be of inestimable value.

1. Introduction

This study expounds the importance accorded to a heritage organization's augmented role identity as conceived by senior managers. Utilizing a theory-building case study methodology, it aims to produce research insights which are analytically generalizable. The research is distinctive for several reasons owing to its emphasis on emergent heritage organizations in a developing country, namely Jordan; its focus on the financial services sector; and because it spotlights corporate social responsibility (CSR) as an augmented role identity. Given the above, this study responds to the call for increased importance to be afforded to the non-economic and societal characteristics of corporate heritage institutions (Balmer & Chen, 2017). Consequently, this study is dissimilar from extant corporate heritage research which, routinely, concentrates on exemplary heritage organizations in industrialized countries (cf. Bargenda, 2015; Burghausen & Balmer, 2014; Cooper, Merrilees, & Miller, 2015; Cooper, Miller, & Merrilees, 2015; Hudson, 2017; Lee & Davies, 2021; Maier & Andersen, 2017; Pecot, Valette-Florence, & De Barnier, 2019; Rindell, 2017; Rindell & Santos, 2021; Spielmann, Cruz, Tyler, & Beukel, 2021).

The findings of this case study established that senior managers

perceived their banks' CSR augmented role identities to be salient and efficacious. Additionally, senior managers conceived these augmented identities to be significant in social-spatial contexts. Thus, CSR augmented role identities were meaningful and valuable because they invested these financial organizations with a troika of distinctive and valuable qualities, encompassing *community, responsibility,* and *utility*. Community encapsulates the bank managers' sense of neighbourliness among the country's diverse communities (East Bank Jordanian, Palestinian Jordanian, Circassian, etc.). Thus, at a micro-level, the banks supported educational, health, and poverty amelioration schemes, for example, among diverse communities. Responsibility captures bank managers' mindset, which displayed commitment to national (macro-level) concerns, including the support of cultural initiatives. Utility embraces bank managers' cognitions that their banks were demonstrably interlaced with the country as cornerstone institutions of national importance. Moreover, the banks were committed in demonstrating their value and, thereby, expressing a sense of 'Jordanianship'.

The article continues by discussing corporate heritage, augmented role identities, and corporate social responsibility (CSR), and explains the national and organizational contexts of the study. Following this, an

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exposition of this study's research methodology is enumerated, and the research findings are detailed. Finally, managerial implications, weaknesses and future research pathways are outlined.

2. Corporate heritage

Since the formal introduction of the corporate heritage concept (Balmer, Greyser, & Urde, 2006), and its broader explication (Urde, Greyser, & Balmer, 2007), there has been an exponential growth of interest in the corporate heritage sphere. As the recent literature attests, academic engagement in the field has intensified since then (Balmer & Burghausen, 2019; Cooper, Merrilees, & Miller, 2021; Lee & Davies, 2021; Mencarelli, Chaney, & Pulh, 2020; Moussa & de Barnier, 2020; Pecot, Merchant, Valette-Florence, & De Barnier, 2018; Pizzi & Scarpi, 2019; Rindell & Santos, 2021; Spielmann et al., 2021).

Corporate heritage identity organizations are distinct in that they have identity traits that have remained invariant over the passage of time (Balmer, 2011). These traits confer long-time strategic value for organizations, since heritage traits are not readily replicable (Balmer, 2013). Although these organizational characteristics were originally understood as traversing the timescales of the past, present, and future (Balmer et al., 2006; Urde et al., 2007), it was subsequently argued that corporate heritage traits are omni-temporal because they synthesize all time frames, which constitutes a new mode of temporality where corporate heritage organizations are, simultaneously, of the past, present, and future (Balmer, 2013).

To be designated as a corporate heritage identity institution, it has been asserted that an organization should meet the following criteria: omni-temporality, institutional trait constancy, external/internal tri-generational heredity; augmented role identities; ceaseless multigenerational stakeholder utility, and unremitting management tenacity (Balmer, 2013). Notably, augmented role identity is identified as one of the criteria.

2.1. Augmented role identity

Corporate heritage organizations have multiple role identities, which are associated with non-corporate-specific identities (Balmer, 2011). These multifaceted identities afford an explanation of why corporate heritage institutions are meaningful and, therefore, valuable (Balmer, 2011). Consequently, corporate heritage entities can be characterized as repositories of multiple, and meaningful, identities which go beyond focusing on an organization's core mission and purpose. Thus, over the passage of time, corporate heritage organizations acquire additional non-institutional identities which are of social-spatial significance. As such, the 'augmented role identity' notion (Balmer, 2013) takes cognizance that corporate heritage institutions can have other, non-corporate, roles (Balmer, 2011). Consequently, a corporate heritage organization is likely to possess one or more augmented role identities that augment its core identity. To date, several empirical studies have explored the notions of augmented role identity and multiple role identity (cf. Balmer & Chen, 2017; Lee & Davies, 2021; Spielmann et al., 2021).

For example, it has been shown that an organization's augmented corporate identity/multiple role identities can accord corporate heritage organizations particular relevance and legitimacy in their socio-spatial contexts (Balmer & Chen, 2015; Blombäck & Scandelius, 2013; Burghausen & Balmer, 2014). Such associations can give a heritage entity legitimacy (Blombäck & Scandelius, 2013); and can be emblematic. Where an organization's augmented role identity has pronounced national and cultural traits, a heritage organization can engender pride in a country and culture, not only among society at large, but also, importantly, across the generations (Balmer & Chen, 2015). This is because heritage organizations with strong cultural and historical associations can *define*, as well as *confer*, diverse identities that are linked to the identity of peoples, territories, and cultures in multi-generational terms (Balmer, 2013).

Although empirical research on CSR as an augmented role identity is absent, the significance of CSR to corporate heritage has been asserted within the canon. For example, CSR can be an important dimension for a heritage organization's corporate communications (Blombäck & Scandelius, 2013). Also, from a brand discourse perspective, the interrelationship between CSR reporting and brand heritage has also been shown to be important (Gill & Broderick, 2014).

3. Corporate social responsibility

With its origins in the 1950s and early 1960s (Bowen, 1953; Chase, Ruttenberg, Nourse, & Given, 1950; Davis, 1960), CSR is now a mainstream management concern. However, CSR has undergone several metamorphoses (Matten & Moon, 2020). Arguably, the most fundamental of these is the shift from an area concerned with the CSR activities of businessmen (Bowen, 1953; Davis, 1960) to an area focused on the CSR activities of organizations (Carroll, 1979; Heald, 1970). Heterogeneous in nature (Secchi, 2007), CSR has been scrutinized from a variety of management and theoretical perspectives (Matten & Moon, 2008; Wang & Gibson, 2020). Moreover, CSR can be characterized as a nucleus for a plethora of analogous notions, including sustainability, business ethics, conscious capitalism, corporate citizenship, stakeholder management (Carroll, 2015, 2016), and corporate governance (Zaman, Jain, Samara, & Jamali, 2022). Recently, CSR conceptualizations have departed from the original focus on social roles (cf. Carroll, 1979, 1991; Davis, 1973; Jones, 1980; Kotler & Lee, 2005) and have embraced political and cultural dimensions. It has also been reasoned that CSR is stakeholder-driven, rather than corporate-driven (Benyaminova, Mathews, Langley, & Rieple, 2019; Öberseder, Schlegelmilch, & Murphy, 2013); is shaped by local needs and priorities (cf. Eweje, 2007), and that its meanings are context-specific (Turker, 2018; Zhang & Dong, 2021).

Although the precise nature of CSR is contested (Fernández-Gago, Cabeza-Garcia, & Godos-Díez, 2020; Gond & Moon, 2011; Mitnick, Windsor, & Wood, 2021; Okoye, 2009), three dominant CSR perspectives can be discerned (Secchi, 2007): utilitarian, managerial, and relational. The utilitarian perspective views CSR as part of a wider economic system; the managerial standpoint sees CSR though the lenses of managers and their organizations, and the relational stance focuses on interactions between organizations and society-at-large. It is the last two approaches (managerial/organizational and relational) which speak to the subject matter of this study. This study is also partly informed by the proposition that a firm's ethical identity is formed relationally, among parties, within a community of business and social exchange (Balmer, Fukukawa, & Gray, 2007). It also corresponds to the nascent Political Corporate Social Responsibility (PCSR) and Corporate Cultural Responsibility (CCR) notions. PCSR is where organizations – especially in failed, weak, or volatile countries – fill the void left by governments and engage in activities traditionally undertaken by nation states, such as social security, public health, education, and protection of human rights (Ingenhoff & Marschlich, 2019; Scherer & Palazzo, 2011). Analogously, CCR refers to the roles of non-governmental organizations in protecting and promoting a society's culture through their business operations and CSR endeavours (Córdoba, 2017; Maon & Lindgreen, 2015).

However, given the complexities of CSR, a pragmatic stance was adopted apropos the framing of CSR for this study. As such, the nature of CSR as referred to in this study is informed by Matten and Moon (2008) influential definition, which emphasizes how CSR-informed corporate policies and practices should meet one or more societal goods.

> Thus, CSR (and its synonyms) empirically consists of (clearly articulated and communicated) policies and practices of corporations that reflect business responsibility for some wider social good. Yet, the precise manifestations and direction of the responsibility lie at the discretion of the corporation. (Matten & Moon, 2008, p. 405)

In terms of this study, the policies and practices of CSR as an augmented role identity can be compared to an organizational-wide

management philosophy.

Furthermore, as Matten and Moon (2020) subsequently explained, their 'capacious' definition allows for CSR to be applied in different national contexts which have different business systems, social structures, and values (cf. Boswell, 1983; Granvetter, 1985). Thus, CSR policies allow organizations to gain, maintain, and repair their legitimacy (cf. Suchman, 1995). As such, this definition is especially salient to this study, which took place in the Hashemite Kingdom of Jordan.

4. National and organizational contexts

4.1. Jordan

This research is distinctive in that it was undertaken in a pre-industrialized country of the Levant: the Hashemite Kingdom of Jordan. Jordan, as a new and developing socio-political entity (cf. Bani & El-Edwan, 2016; Brand, 1995; Massad, 2001; Reiter, 2004), has precious few natural resources. The country is heavily reliant on overseas aid, and is encumbered with a sizeable refugee population (The World Bank (2021), 2021). As a nation, Jordan suffers from manifold economic, political, and social adversities. Yet, within the literature, it has been noted that where nations experience hardship and economic travails, corporate heritage institutions can be particularly meaningful (Hakala, Lätti, & Sandberg, 2011; Wiedmann, Hennigs, Schmidt, & Wuestefeld, 2011; Wiedmann, Hennigs, Schmidt, & Wuestefeld, 2011). As such, the scrutiny of three nascent heritage organizations within the Kingdom can be seen to be both timely and opportune.

4.2. Organizational contexts

This study focuses on three prominent commercial banks operating in Jordan. All three banks were established in the 1960s, and all can be viewed as nascent corporate heritage institutions (cf. Balmer, 2017). They are 'home-grown' and are broadly similar in terms of their characteristics. For example, they each employ between 1500 and 1800 staff. Furthermore, each bank operates between 50 and 80 branches, and the three banks have a regional presence beyond Jordan, including Palestine. Additionally, their paid-up capital is broadly similar, ranging between 150 and 180 million Jordanian Dinar. Conspicuously, and in economic terms, the banking sector is one of the most important, and developed, sectors within Jordan (Al-abedallat, 2017; Alrgaibat, 2015; World Finance (2015), 2015). The broad characteristics of the three banks constituting this study are as follows.

4.2.1. Bank 1

Established in the 1960s as a corporate bank, it shortly afterwards moved into retail banking. Today, it is one of Jordan's major retail banks and has close associations with the public sector and its employees. It pioneered the democratization of retail banking practices and, consequently, is known for its openness and engagement with Jordanian society. It has an enviable tradition of providing charitable donations to various social causes, charities, and national social initiatives. It is noted for its initiatives in fostering financial inclusion and financial literature within marginalized groups.

4.2.2. Bank 2

Also established in the 1960s, the bank's activities are broad in scope and encompass the retail, corporate, and SME sectors. It has also advocated and supported financial inclusion and has combatted financial illiteracy in Jordan, and has been a prominent financial contributor to social, charitable, and national causes. Celebrated for its high standards and professionalism, it is a favoured bank in which to work, and its employees are often sought after by other banks.

4.2.3. Bank 3

Founded in the 1960s, the bank – the smallest of the three – has a particular focus on SMEs and offers broad support to SMEs which goes beyond financial concerns. Notably, it was the first bank to offer such support to SMEs in Jordan. While noted for its SME activities, it also serves the retail and corporate sectors. It has also supported social, charitable, and national initiatives. It has a prominent role in fostering acculturation in Jordan.

5. Methodology

This empirical study is informed by an interpretive research perspective; is apprised by the precepts of multiple case study research (Stake, 1995; Yin, 2003); and utilizes qualitative methods of data collection (Creswell & Poth, 2018; Miles & Huberman, 1994; Myers, 2009). Customarily, case study research results in theory generation (Eisenhardt & Graebner, 2007; Eisenhardt, 1989; Levy, 2005; Perry, 1998). Case study research is noted for its ability to yield an in-depth understanding of naturally occurring phenomena within their real-life social contexts (Stake, 1995; Yin, 2003). Notably, a similar methodological approach has characterized several empirical studies within the corporate heritage domain (Burghausen & Balmer, 2014; Rindell, Santos, & de Lima, 2015).

Since corporate heritage is a socially constructed phenomenon (2013; Balmer, 2011), and in accordance with the research traditions of this study, this research seeks to explicate, and not merely describe, the phenomena under scrutiny (Bryman, 2016). Such an approach is efficacious to a nascent area such as corporate heritage, where the extant literature is limited (Creswell, 2014), and, moreover, where importance is attached to the context in which a phenomenon is situated (Stake, 1995; Yin, 2003).

Initially, six pilot interviews were undertaken with managers within the three banks, in accordance with the precepts of case study research (Yin, 2003). The pilot interviews revealed that managers viewed their banks to be nascent corporate heritage institutions. These interviews also confirmed the efficacy and feasibility of undertaking in-depth qualitative data collection within the three banks.

Following the above, the primary mode of data collection comprised in-depth, semi-structured interviews (Charmaz, 2006). The unit of analysis was the banks' senior managers (Bryman, 2016; Yin, 2003). Senior managers were selected for a variety of reasons, including their broad grasp of their organizations; their engagement with strategic planning; and their intimate knowledge of their institutions' corporate identities. Furthermore, given that CSR policies and practices are informed by managers' values, ideals, and beliefs (Duarte, 2010; Hemingway & Maclagan, 2004), there was logic in focusing on senior managers. This is because an organization's CSR policies, and especially its CSR credentials, are primarily shaped by senior managers (Scott & Lane, 2000; Wang & Dou, 2012).

In total, twenty-one semi-structured interviews were undertaken with senior managers. Six were undertaken in Bank 1, seven in Bank 2, and eight in Bank 3. Typically, the interviews lasted between 25 and 70 min. The interviewees' length of employment within their respective banks averaged 12 years. The longest period of service was 26 years and the shortest was 2 years. All interviews were recorded and transcribed. The thoroughness of this approach was reflected in interview transcriptions which yielded approximately 92,000 words of textual data.

In addition to semi-structured interviews, corporate documents (i.e., annual reports and website content) were also collected. Although these documents were not subjected to formal qualitative coding, these additional sources allowed for the triangulation of data (Charmaz, 2006; Stake, 1995; Yin, 2003). Thus, the careful examination of these documents helped to corroborate the findings from the analysis of interviews. As such, the results of axial and selective coding were compared to the content of corporate documents, where concurrences in meaning were identified. Corporate documents are significant for theory-building case studies because they provide meaningful representations of organizations (Moisander & Valtonen, 2006). Moreover, corporate documents

can be revelatory apropos an entity's corporate heritage along with its identity claims (Chreim, 2005). Notably, corporate documents typically generate thick – and often comprehensive – descriptions of an organization and its history (Stake, 1995). Reference was also made to the annual reports of the three banks, since they provide authoritative sources of information relating to an organization's performance and identity (Adams, Hill, & Roberts, 1998). Specifically, annual reports are efficacious in enumerating a company's CSR and environmental credentials (De Grosbois, 2012; Holcomb, Upchurch, & Okumus, 2007; Tang & Li, 2009; Tschopp, 2005). Furthermore, data was also collected from the banks' corporate websites. Websites can be revelatory in both revealing and communicating a firm's CSR credentials (Capriotti & Moreno, 2007; Du, Bhattacharya, & Sen, 2010). Additionally, they also convey an organization's corporate identity (Mohammed, Guillet, Schuckert, & Law, 2016).

The analysis of interview transcripts was undertaken manually and utilized the tenets of multi-stage coding, as advocated by grounded theory scholars (Corbin & Strauss, 2008). As such, the coding of data underwent three stages of analysis, resulting in the generation of open, axial, and selective codes. Open coding represents a detailed first stage analysis of the data. Across all three cases, the stage one analytical coding process yielded 860 open codes. Axial coding constituted the second stage of analysis of data, where commonalities and relationships between open codes were identified and higher order categories (axial codes) were identified. In stage two of the analytical coding process, seventy-three different axial codes were established. Finally, the generation of selective codes represents the final stage of analysis, where links between axial codes are identified and higher order (selective) codes are generated. At this juncture, there is saturation of data. The final stage of the analytical process yielded nine selective codes. In addition to the multi-stage coding, the analytical process was informed by constant comparison, memo writing, and diagram drawing (Charmaz, 2006; Corbin & Strauss, 2008). Accordingly, the analytical process of this study, in accordance with the precepts of multi-stage coding, resulted in thick descriptions of the phenomenon under scrutiny (Miles & Huberman, 1994; Stake, 1995). The first researcher carried out the process of analysis independently, while the second researcher's input was supervisory in character, entailing, for example, reviewing the analysis and conclusions apropos each stage of analysis. This sequential process provided rigor and allowed for a consensus to be reached vis-à-vis the research findings.

Additional rigor was applied to the data via the adoption of cross-case analyses. This allowed for the comparison of theoretical insights (Eisenhardt, 1989). As such, the research and theoretical insights uncovered in the first case were found to have been broadly replicated in the findings in the second and third cases. Given the similitude of the findings between the three banks under investigation, and following the protocols of grounded theory analysis, it became apparent that data saturation had been reached. Data saturation is a key tenet of multi-stage coding (Guest, Bunce, & Johnson, 2006; Lincoln & Guba, 1985). Consequently, at this point, there was confidence that little was to be gained by studying additional cases or by engaging in further rounds of interviews (Creswell & Poth, 2018).

6. Findings

The in-depth qualitative analysis of data revealed corporate social responsibility to be a meaningful augmented role identity for managers. Consequently, it was found that CSR as an augmented role identity accorded the banks distinctiveness and meaning that went beyond their core business purposes. The meaningfulness of this augmented corporate heritage trait was manifest in three distinct dimensions relating to community, responsibility, and utility. These represent the selective codes of this study.

CSR as an augmented role identity was meaningful on two dimensions: the first internal, and the second external. Internally, it was

meaningful because it was a key constituent of each bank's corporate identity. Externally, in social-spatial contexts, it accorded national significance. Given the above, the CSR corporate heritage trait can be designated as a meaningful augmented role identity (Balmer, 2011, 2013). It was a trait which had significance and meaning beyond each bank's core business purposes (Balmer, 2013). Thus, the three banks – because of their corporate heritage traits – shared CSR qualities of *community, responsibility*, and *utility*: see Fig. 1.

Table 1 reports indicative quotes from the interviews relating to the banks' CSR heritage identity traits. Table 2 includes corroborative information from the banks' annual reports and websites.

6.1. Community manifestation

'Community' refers to issues of managers' sense of neighbourliness. The banks' neighbourliness was evidenced in their participation in community development and in providing welfare support for the varying needs and challenges of the country's diverse communities. For example, the three banks were engaged in a variety of community initiatives encompassing education, poverty amelioration, health service provision, and the support of cultural and arts activities. While all the banks participated in the above initiatives, there were differences in the ways in which the banks supported such activities. As such, although there were commonalities in terms of 'Community' across the banks, there were variations in the degree and sophistication to which this characteristic had been institutionalized. For example, a sense of community could be reflected in 'hands-off' financial support and could equally well be evinced in a more pronounced 'hands-on' approach. With the latter, a more engaged and initiative-taking stance was adopted.

6.2. Responsibility manifestation

'Responsibility' encompasses a managerial mindset where there is fealty with, and sensitivity towards, wider national societal concerns. Thus, 'responsibility' reflects a cognitive mindset which informed the banks' managers' overall concerns with CSR issues. While this characteristic was found to be present in all three banking institutions, it was manifested in a variety of ways by the banks. Thus, Bank 3 manifested 'Responsibility' by supporting various initiatives such as publishing books on Jordanian culture and folklore and establishing a numismatic museum. As a family-owned bank, with pronounced tribal roots and associations, the bank had a keen sense of national fealty. For Bank 2,
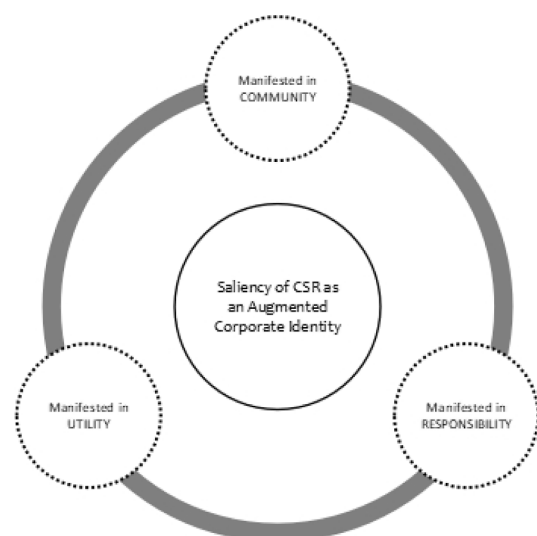

Fig. 1. Saliency of CSR as an augmented corporate identity for the heritage organizations examined.

Table 1

Indicative quotes from the interviews relating to the banks' CSR heritage identity traits.

CSR augmented corporate identity traits	Bank 1	Bank 2	Bank 3
Community	"Heritage is different from history; it is not your history. It is what you have been doing throughout these years, how you have been supporting the community. The schools you have built, for example. Our heritage is the things we have been doing for the community which we are part of … our bank's heritage is represented in its community participation, which is now a fifty-year-old practice." *Senior Manager 1* "With regard to the bank's community contributions, there is nothing that we have not contributed to. We contributed to all sectors: for example, the universities, all the state universities – we have been sponsoring their conferences and workshops. Another example is public schools: we contributed to the Madrasati ["My School"] initiative, which is led by her Majesty Queen Rania. We have also participated with the security bureaus in their national-level programs. Additionally, we have contributed a lot to King Hussain's Cancer Foundation: in fact, we are one of their biggest sponsors." *Senior Manager 3*	"At the end, we are ultimately a community service establishment. So, the community is important, as our customers basically come from this community. So, I have to interact with this community in both spheres: business and community service. Thus, I have to have sponsorships: for example, sponsorships for anything that is in line with the community's needs, wherever I have a presence … to be respected, an institution should be seen participating in its community, for example, by contributing to the community needs." *Senior Manager 5* "The CSR concept is new, but the bank was implementing it before its appearance in the market. I can talk about the period which I witnessed. I began working for the bank in 1990, and there were community participation programs and sponsorships for a variety of causes during that year and the years after." *Senior Manager 2*	"The bank has always, throughout the years since it was established, performed its community role. But it was unaware of CSR as a concept and as a structured practice, so its community role over the years used to take the form of charity and regular donations, aimed mainly at education and community empowerment." *Senior Manager 10* "Our CSR practice is unique in that it is a bottom-up one. This is an influential feature of our CSR orientation because the bank's employees and their belonging to their institution, and their belonging to their country, are the essential driving forces for the bank's CSR." *Senior Manager 13*
Responsibility	"For example, and as you know, we are currently	"[Bank 2] is probably the only bank that deals in	"[Bank 3] truly has a heritage that cannot be ignored.

Table 1 (*continued*)

CSR augmented corporate identity traits	Bank 1	Bank 2	Bank 3
	going through another depression, and some institutions resort to irresponsible behaviour to increase their profitability during these reoccurring times, such as layoffs. Such behaviour is completely unacceptable according to our fundamental policy. It is impossible to lay off an employee, and this is an aspect of our humanitarian beliefs … we have never increased and will never increase the burden on the community by laying people off." *Executive Manager 1* "They [the bank's senior management] are nationally committed, their vision is firstly a national-level vision. They are always willing to contribute to anything that is in line with the national interest, and they feel proud to do so." *Senior Manager 4*	this highly transparent way, and according to the best banking traditions with clients, it deals with customers in a very transparent way, which is not an easy thing to do. And I am sure that if there were no bank's heritage in this respect, it would have been impossible to be that transparent with the customers – it would have been a complete mess. So, it is obvious to me that the bank has been using its heritage in this respect." *Executive Manager 2* "A second aspect of the bank's heritage, an aspect that has always existed, is its highly transparent dealing with its employees and clients and in accordance with the law and regulation, the policies, and the procedures. This is, in fact, a present heritage and competency that the bank has been maintaining. And being transparent is not an easy thing, I do not know if you have banking experience, but it is really difficult to be fully transparent, as sometimes this transparency will be at your own expense, the bank's expense." *Senior Manager 12*	And this is why [Bank 3] cannot be anything but a nationally loyal bank that contributes to and serves its country's economy, and this is something that is really important to the bank … this is something that makes us feel much more responsible for our country's market, economy, and people." *Senior Manager 11* "The owners of the bank are from a very reputable Jordanian family that has made lots of national commitments to Jordan…. National commitment has been something that characterises the bank's management and thus the bank. So, we work on the basis of the commitment we have to Jordan and to achieve the development of the Jordanian community and also to serve our customers. All these are elements of [Bank 3's] philosophy." *Senior Manager 18*
Utility	"We have been serving the state in different ways. One of these is the state fund collection. You know we are a bank of wide and intensive (national) presence." *Senior*	"What is really unique about the bank is that it is one of the very few old banks that were founded in Jordan. And that it is a bank of Jordanian national identity, and this is the most	"There were two occasions when the bank witnessed something of a regression. And these were when the bank entered mergers with * Bank and then with * Bank. Bank mergers at that time were

Table 1 (*continued*)

CSR augmented corporate identity traits	Bank 1	Bank 2	Bank 3
	Manager 6 "Look at the operational costs that we save for the state by getting involved in these projects [the Royal grants]. Our involvement in these projects helps to achieve great goals for other parties, for example by lowering the risks, managing these huge projects properly. Whatever the size and the nature of the project, we complete it within a month and a half. Note that these grants [subsidies] are also paid to people who live in remote locations, locations that you can't think of, and sometimes the value of the grant or the subsidy does not justify the cost and effort of travelling to the governorate centres to get it, so they need to pay these grants or subsidies in ways that are convenient." *Senior Manager 19*	important aspect of its uniqueness, because we represent that identity." *Senior Manager 20* "There are now several things that distinguish our bank. For example, it is known that it has been a school for the sector, for other banks. I consider this a heritage aspect, and we are all proud of it. All our employees have been attractive targets for recruitment by other banks because they assume that all the employees of [Bank 2] are highly experienced, competent, and skilful, and thus they stand out at the sector level." *Senior Manager14*	something that the Central bank had long requested and encouraged, since the number of banks was seen to be high relative to the size of the national economy. And this was felt to be an impediment, and for a long time stood in the way of the desired rate of development for the banking industry in Jordan." *Senior Manager 8* "Our numismatics museum has around 40 thousand different historical coins, and this is history by itself. It also has a full assortment of civil and military medals that were issued in Jordan since the days of the Emirate of Transjordan." *Senior Manager 7*

the 'Responsibility' sentiment was substantiated in its transparency, which was manifest in its pursuance of high ethical standards and fastidiousness that went beyond its strict adherence to legal and ethical requirements. Although this was an additional cost for the bank, this 'social responsibility' in terms of its heritage of transparency better served customers and employees. Transparency is often cited as a characteristic of CSR (cf. Dubbink, Graafland, & van Liedekerke, 2008; Sendlhofer & Tolstoy, 2022). As it has been noted: "Transparency is a quality of corporate social responsibility communication that enhances the relationship between the investors and the company" (Fernandez-Feijoo, Romero, & Ruiz, 2014, p. 53). Finally, Bank 1 adopted a hybrid approach in that it was proactive on some responsibility dimensions and reactive on others.

6.3. Utility manifestation

'Utility' refers to managers' mindfulness towards their national economic and social roles and where managers, and their organizations, had palpable CSR credentials. Consequently, profit maximization and shareholders concerns' were not their sole focus. Thus, the banks were attuned to their social responsibility concerns. All three banks embraced

Table 2

Corroboration of interview findings. Evidence from the banks' annual reports and websites.

Community	"(At Bank 1) we believe that banking business can only flourish in communities where every-one is empowered and has a decent opportunity to develop and grow. For this reason, our bank continuously supports initiatives that pour into social empowerment for the community at large and disadvantaged groups in particular.'' *Bank 1 Annual Report 2003* "(Bank 1) has developed its programmes and the quality of its partnership with the local community so as to implement its policy in promoting the overall development and its sustainability." *Bank 1 Website* "In pursuing its mission and deep-rooted values towards the local society and surrounding environment, the bank continued its generous drive in caring for and supporting various activities as a contribution to enhance local capabilities and potential for better services." *Bank 2 Annual Report 2006* "(Bank 2 is committed to) … serve its community and country. The bank adopts many social, cultural and charitable activities, as well as providing financial support to many volunteer and charitable organizations working in humanitarian, health, cultural, scientific and environmental fields, in addition to supporting scientific research activities." *Bank 2 Website* "(Bank 3) … has a wealth of experience in programs that contribute towards economic and social development in local communities. The Bank has succeeded in transforming the culture of charity and voluntary activities performed by the private sector into an acknowledged and accepted strategic approach that provides sustainable growth and development to society." *Bank 3 Annual Report 2011* "We work with a strategic, long-term vision based on principles of social, environmental, and economic responsibility with which we hope to positively impact as many people as possible from the different social backgrounds and sectors, and to provide new opportunities for the people and the youth." *Bank 3 Website*
Responsibility	"The board of directors …. presents to you the bank's annual report for the year ending on 31st of December 1965, which clearly points, with thanks to God, to progression the bank has achieved in growing its operations, and expanding its services. And thus, making a very significant contribution to the active economic development of the Hashemite Kingdom of Jordan." *Bank 1 Annual Report 1965* "Behind all this effort is the aim of supporting Jordan's economy and pushing the progression wheel further ahead." *Bank 1 Annual Report 1963* "(Bank 2's guidelines are) …based on the principles of integrity, objectivity, transparency, disclosure, openness, and accountability …. This stems from the Bank's belief that disclosure offers the only means to provide transparent, accurate, comprehensive, and timely information" *Bank 2 Website* "(Bank 3 has) …ingrained its roots into the heart of our national economy to become therefore one of its main constructive pillars, where the bank's branches are distributed all over the country." *Bank 3 Annual Report 2004* "With a rich national heritage and identity, (Bank 3) is one of the Kingdom's leading banking institutions. Established in the 1960 s as the first national bank in East Jordan, the bank played a pivotal role in the growth and evolution of the country's financial sector, employing its ambitious vision to drive the banking industry forward. (Bank 3) has always strived to serve as a role model for other banks, leading by example through high-quality products and services and a commitment to comprehensive and sustainable economic development." *Bank 3 Website*
Utility	"(Since the 1960 s, Bank 1) …has been keen on employing its strong capital and its five-decade, well-founded experience to play a distinguished leading role in promoting the national economy through providing a distinct and inclusive range of services and successful banking solutions that fulfil the various needs of its customers." *Bank 1 Website* "(Bank 1's) support for culture and art is manifested through the inauguration of a one-of-a-kind art gallery that is considered as a national incubator for artists and young talents; where beautiful paintings reflecting social and cultural heritage are exhibited." *Bank 1 Annual Report 2015* "Driven by a sense of responsibility towards the environment and community, (Bank 2) has continued to support and sponsor various scientific, cultural, sports and social activities and charities." *Bank 2 Website.* "(Bank 2) is keen on adopting a variety of diverse social and cultural charitable activities, and on providing monetary and in-kind support for a variety of charitable organisations that are concerned with human, health, cultural, educational, professional, and environmental causes." *Bank 2 Annual Report 2001* "The idea of

Table 2 (*continued*)

> founding a Jordanian bank established by a capital (from) Jordanian people … (had as its primary purposes) … to promote trade, to contribute to the construction processes, and to establish industrial and agricultural projects." *Bank 2 Annual Report 1960*"The bank's museum is the first of its kind in the region, with collections numbering about 40,000 coins. The ideals of a collector and the wisdom and generosity of a banking institution come together to produce an excellent educational legacy beneficial to society." *Bank 3 Website*"The National Museum of Numismatics was completed during 2002. This museum contains the rarest and most complete collection of coins and numismatics throughout four thousand years of the history of Jordan and the Arab Orient. The Municipality of Greater Amman will use this museum in its activities and cultural programs." *Bank 2 Annual Report 2002*

a sense of 'Jordanianness' as part of their identities and their desire to demonstrate their utility to the Kingdom of Jordan and its people. Consequently, the banks' activities were not only intricately intertwined with the country's economic development initiatives but also with helping to sustain the continuance of this troubled nation state. Thus, the banks' managers expounded the view that their banks meaningfully contributed to Jordan's collective sense of socio-political identification and provided an expression of national identity. Therefore, the banks were of a dual-faceted economic/socio-cultural utility to Jordan. The first facet was related to their provision of nation-wide finance: by this means, they shaped and underpinned Jordan's economy. The second, significantly, was related to the banks' CSR initiatives, which had utility for Jordan in socio-cultural terms.

7. Discussion and conclusion

The research insights from this study represents a substantial extension to corporate heritage literature for two reasons. By means of context, it is the first empirical study to focus on CSR as an augmented role identity. Furthermore, the study is distinctive in that it focuses on three nascent corporate heritage organizations operating in a developing country. The second reason is because this study advances our understanding of corporate heritage by revealing that senior managers within the three banks examined not only conceived augmented role identity to be of importance but also found their banks' CSR augmented role identities to be especially meaningful. As such, the CSR augmented role identity extended the banks' scope beyond a narrow concern with financial services. For managers, a CSR augmented role identity was significant and meaningful in social and spatial as well as organizational contexts.

In particular, the CSR augmented role identity was purposeful in both outward-directed and inward-directed terms. In external contexts, senior managers viewed this augmented role identity as a vehicle through which their organizations could participate in community development; engage in significant societal and national concerns; and demonstrate their economic worth to the Kingdom of Jordan. In internal contexts, managers reasoned that the CSR augmented role identity afforded their organizations a distinctiveness and meaning that went beyond their core business purposes grounded in finance.

Consequently, senior managers viewed their banks not only as financial institutions but also as socially responsible entities. Furthermore, managers conceived the CSR augmented role identity to be consequential in socio-spatial contexts. This is because they reasoned that it was of consequence to the people, culture, and territory of Jordan. These dimensions (people, culture, and territory) conform to an espoused key quality found in the corporate heritage trait (cf. Balmer, 2013). The findings corroborate a corporate heritage rationale: namely, the significance and success of many corporate heritage organizations owing to them being associated with non-typical organizational characteristics linked to culture and territory. These are characteristics that afford them a distinctiveness, and sometimes, an alluring aura of

exclusivity (cf. Balmer, 2013). In external contexts, according to the cognitions of senior managers, they were not only guided by their core heritage as financial institutions but also, significantly, were substantively guided by their organizations' CSR augmented corporate heritage trait.

7.1. Management advice

This empirical study has revealed how organizations with a CSR augmented role identity are bestowed with a meaningful, distinct, and sometimes inimitable organizational asset of strategic worth. For managers, this is noteworthy, because it affords organizations a peerless platform on which bilateral, societal and stakeholder relationships can be formed and progressed. This is, of course, in addition to the organization's core business activities. In an era where increased importance is attached to CSR by organizations, the public, policy makers, and society at large, managers should be cognizant, and mindful, that a CSR augmented role identity is valuable on many fronts. Specifically, for financial services heritage organizations in developing countries, managers should contemplate whether their organization has a CSR augmented role identity and, if so, demonstrate on-going custodianship of this identity and ensure that their organization's activities remain in meaningful alignment with it.

More generally, managers should be cognizant that where an organization has an augmented corporate identity, this can burnish the overall distinctiveness and attractiveness of the organization. As such, it may constitute a valuable corporate resource, and can inform an organization's corporate communications policies in narrating, visualizing, performing, and embodying its broader corporate heritage. Furthermore, it can be utilized as one dimension of an organization's corporate brand promise and can be marshalled as a supplementary benchmark against which an organization can appraise its activities. Context is important here. As this study has uncovered, a CSR augmented role identity has greater saliency when it benefits the organization, stakeholders, society, and the country.

Given that some institutions will have multiple augmented role identities, it is the task of managers to be apprised of these, including their scope, nature, and value. Finally, managers need to be continually apprised of the importance of corporate heritage stewardship. This study accentuates the importance of this and reinforces similar observations made in the literature (cf. Burghausen & Balmer, 2015; Cooper et al., 2021; Maier & Andersen, 2017).

7.2. Weaknesses

Although this empirical study advances the corporate heritage domain by explaining managers' cognitions of the salience and meaningfulness of CSR as an augmented role identity, the nature of qualitative explanatory research means that the findings are not claimed to be generalizable. However, this is not to discount the possibility that the findings have the potential for analytic generalizability.

Furthermore, this study is country- and industry-specific. For instance, Jordan encounters specific economic and social travails and deprivations. This also imposes a further limitation apropos theoretical generalizability of the findings of the study. This being noted, the research findings might speak to similar developing countries in the Levant, Africa, and beyond. Significantly, these regions are infrequently the focus of empirical research, not only in relation to the corporate heritage field but also, more expansively, in management.

7.3. Future research

Given the embryonic nature of corporate heritage research, there are many avenues for future research with specific reference to the broad territory of this study. For example, further research in financial institutions in other developing countries which have a pronounced CSR

augmented corporate identity would usefully supplement the research findings outlined in this study. Furthermore, there is utility in undertaking similar research on the CSR augmented corporate identity phenomenon from a stakeholder perspective. Thus, the cognitions of CSR augmented role identity – or of another augmented role identity mode – having a specific focus on personnel, customers, government, and communities, among others, would have utility. Furthermore, the issue of whether a CSR augmented role identity is of greater salience when it benefits the organization, stakeholders, society, and the country (as in this study) as opposed to other benefit modes could represent an important line of enquiry. These proposed studies could usefully be undertaken in developed as well as in developing countries. Additionally, there is scope to examine different industry sectors. Furthermore, cross-country comparative case studies might also be efficacious and could explore the interdependence between the CSR augmented role identity and the identities and characteristics of an institution's socio-spatial surroundings. Research could also scrutinize the usefulness of the CSR augmented role identity for CSR communications and for overcoming the challenge of scepticism towards CSR. More generally, while corporate heritage in prominent and well-established corporate heritage organizations in developed countries has clear utility, the focus could be expanded. Accordingly, there is also a need for this to be balanced with research into corporate heritage institutions that have a less defined provenance, and which are based in developing countries. The latter, of course, has been one of the characteristics of this study of three nascent corporate heritage organizations operating in the Levant.

CRediT authorship contribution statement

Amjad H. Al-Amad: Investigation. **John M.T. Balmer:** Supervision , Writing - review & editing.

Declaration of Competing Interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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