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Institutional work and institutional entrepreneurship in the Ontario craft beer industry

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Abstract: This paper explores how Ontario's craft brewers created new as well as disrupted and changed existing institutions at local and regional levels in the province's beer industry. Using a relational economic geography framework and a markets-as-practices perspective, this study highlights the brewer's collaborative and pro-social practices, showing how close inter-firm relations and engagement with local communities resulted in resource mobilization such as better access to financial capital and greater social capital, which mobilized public support for the industry, and ultimately which helped individual and collective institutional work efforts succeed. The findings are significant as they show how actors in the industry overcame the constraints imposed on them in an oligopolistic market dominated by multinational firms. It also posits craft brewers acted individually at a local scale as institutional entrepreneurs, revisiting criticisms around this concept. This research contributes to understanding how localized market actors can achieve broader institutional change and offers insights into the relationship between market practices and institutional work, including entrepreneurship in craft industries.

Keywords: craft beer; craft industry; institutional entrepreneurship; collective institutional work; markets-as-practices; relational economic geography

1 Introduction

The North American craft brewing industry has grown from a single brewery in 1976 (Acitelli 2013) to thousands of breweries across the US and Canada. Much of this growth occurred during a boom in the early 2010s when an influx of entrepreneurs opened craft breweries alongside the large multinational firms that dominate the conventional beer market (Garavaglia and Swinnen 2018; Weersink et al. 2018). Early craft breweries faced a slew of hurdles wherever they established their business (Garavaglia and Swinnen 2018). In Ontario, they contended with stricter regulations than most other jurisdictions and a distribution system largely operated by their incumbent multinational competitors (Weersink et al. 2018). This paper explores how Ontario's craft brewers established successful businesses and a thriving industry characterized by collaborative practices and strong community engagement. They achieved this by creating a more favorable localized institutional market context.

However, the institutional change witnessed in Ontario's craft beer industry requires complex work and substantial resources. Such change is often difficult or impossible for the agents most interested in it, who usually have limited financial resources and political power (Hardy and Maguire 2008). For example, in recent work, Glückler and Eckhardt (2022) found that craft brewers in Bavaria lacked the resources and power to disrupt and change legally regulated institutions. The authors assert that this type of disruptive institutional work is unlikely in oligopolistic brewing markets, as found in Ontario. Glückler and Eckhardt (2022) argue that the brewers they examined worked collectively to undermine local legislation limiting their businesses, concurrently *folding* a new institutional understanding overlaying the older regulation, creating a more favorable business environment. These findings offer an intriguing foundation for the primary research question this study aims to answer: (how) did Ontario craft brewers create new institutions and disrupt and replace existing regulatory institutions in their localized oligopolistic market? Further, this research asks whether (and how) the collaborative nature and pro-social initiatives of Ontario craft brewers facilitated collective institutional work that led to these changes?

This project uses a markets-as-practices perspective (Kjellberg and Helgesson 2007) applied through a relational

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economic geography framework (Bathelt and Glückler 2011). It takes an abductive approach (Easton 2010) in exploring Ontario craft brewers' practices to explain institutional work there. I argue that the brewers institutionalized collaborative and cooperative tendencies among themselves and an informally united competitive position against the conventional brewers. Additionally, the breweries institutionalized pro-social business practices, generating public goodwill toward them. The industry's cohesive nature and close proximity helped the brewers engage in collective institutional work, including gathering resources and support, leading to the disruption and change in the existing regulatory framework designed for and supporting the conventional brewing industry. In demonstrating this, this research refers back to criticism that institutional entrepreneurship is the purview of a few heroic actors (Delmestri 2006; Lawrence et al. 2009; Leca et al. 2008). Instead, I show how the individual efforts of small firms with limited power and impact did realize local institutional change. They also contributed to collective work with a more significant impact. Beyond its central focus, this empirical relational study contextualized at the micro- and meso-levels of a localized market addresses and calls for economic geographers to focus more on spatiality in critical market studies (Berndt et al. 2020) and for increased attention on craft firms and their contexts in the entrepreneurship and innovation literature (Hasanah et al. 2023; Pret and Cogan 2019).

The remainder of the paper is structured as follows: I start with a brief history and overview of the craft beer industry. Next, I discuss the conceptual grounding supporting my exploration of institutions in the craft beer industry. I then describe the methodology I applied for this research. The paper proceeds with a discussion of my empirical findings and how they relate to the literature on institutional entrepreneurship. Finally, I summarize my findings, demonstrating their significance to economic geography, entrepreneurship literature, and practical policy efforts.

1.1 Overview of the craft beer industry

Understanding the history of brewing in North America can help us better understand the trajectory and developments in the contemporary Ontario craft beer industry (Martin and Sunley 2022). Early colonists set up local breweries in most communities to account for beer's perishability and difficulties transporting a heavy liquid (Sneath 2001). The early US brewing industry peaked in 1873 with 4,131 breweries (Brewers Association n.d.). However, technological advances, such as improvements in transportation and refrigeration, ushered in a period of consolidation as breweries sought a competitive advantage over their counterparts (Cabras et al. 2023; Howard 2014). By 1978, just 89 breweries were operating in the US (Brewers Association n.d.). There was a similar history of industry contraction in Canada, where the number of breweries fell from 120 in 1910 to just 10 by 1985 (Weersink et al. 2018). Over time, breweries also increased efficiency, market reach, and profit by adjusting their ingredients; however, this also homogenized the flavor profiles of their beers (Choi and Stack 2005). By the 1990s, mass-market beers tasted so similar that consumers could not distinguish between conventional lagers. In sum, the ascendance of large multinational breweries came at the cost of dwindling local and regional breweries and the diversity of beers available (Roy and Bathelt 2024).

The roots of the craft brewing industry lay in consumers' response to the beer market's lack of variety. In the 1970s, some dissatisfied beer drinkers started homebrewing, with some eventually scaling their hobby up to small businesses (Acitelli 2013). Craft breweries typically start as small businesses with founders handling most roles (Flanagan et al. 2018). They often start with minimal capital, low production capacity, and serve only a small local market (Garavaglia and Swinnen 2018). Early craft breweries faced regulatory challenges, operated in legal grey areas, and had to educate the public and push for legislative changes while piecing together equipment and establishing supply networks (Calagione 2011). They did this while competing against established multinationals with optimized, cost-effective supply chains.

Historical accounts of the craft brewing industry in North America (c.f. Acitelli 2013; Calagione 2011; McLeod and St. John 2014; Sneath 2001) suggest pioneering craft brewers were institutional entrepreneurs. Many early craft brewery founders worked to adapt or change existing laws that either did not accommodate or prohibited their brewery operations. In the late 1970s, home brewing was illegal in the US (Acitelli 2013). With no precedents to draw on, craft brewing pioneers in California and Colorado campaigned for their local governments to recognize and establish approval processes. Similarly, in the 1980s, it took two years for the founders of Canada's first microbrewery, Granville Island Brewing in British Columbia, to establish licensing legislation and garner government approval (Sneath 2001). The necessary laws appear to have been in place when the founders of Ontario's first craft brewery, Brick Brewing Company, became the first brewery in Eastern Canada in 37 years to be granted a new license, suggesting there were likely regulatory hurdles (Roy and Bathelt 2024). The work of these first entrants to introduce and change legal and other formally regulated institutions eased the process for future entrants.

This grassroots brewing movement opened the doors for and drove a considerable increase in breweries across the US and Canada (Garavaglia and Swinnen 2018). There was a gradual start in the US, as the 92 breweries operating in 1980 grew to 1,813 in 2010. Subsequently, the industry experienced massive expansion, growing to 2,670 breweries in 2012, 5,780 in 2016, and 9,247 in 2021 (Brewers Association n.d.). In 2022, craft brewers' made a significant economic contribution to the US market: 24.6 % of the $115.4 billion in total beer sales, 13.2 % of 182 million barrels brewed, and directly employing nearly 190,000 people (Brewers Association n.d.). On a smaller scale, similar trends followed the opening of Canada's first two craft breweries in 1984 (Sneath 2001). Breweries grew from 310 in 2010 to 640 in 2015, 1,005 in 2019, and 1,210 in 2020 (Beer Canada n.d.; Canadian Craft Brewers Association 2019; Weersink et al. 2018). In Ontario, breweries increased from fewer than 100 in 2010 to 340 in 2019, employing over 4,600 people, accounting for over 80 % of provincial brewery jobs before COVID-19 (Ontario Craft Brewers 2022). Craft beer sales were estimated to make up at least 10 % of Canada's $9.1 billion total beer sales in 2022 (Comeau 2022). Thus, the craft beer industry is a significant source of employment, sales, and entrepreneurship.

The US and Canadian craft beer markets have nonetheless slowed recently. Some explanations for this shift include market saturation, changing consumer preferences, and the COVID-19 crisis, which led many craft brewers to close, consolidate, merge, or seek cooperative strategies to survive and rising costs since then (Kirby and Lundy 2022). In this paper, I focus on the market's formative years and do not address later developments. However, these developments have likely impacted the industry and may present an opportunity for comparison. In sum, craft breweries represent a substantial industry segment, accounting for a substantial portion of the overall North American brewing industry's firms, sales, and employment.

As mentioned, Ontario's regulatory and competitive environment placed more barriers to growth and innovation on craft brewers than most other regions, including burdensome regulation and licensing processes and steep taxes and fees (Roy and Bathelt 2024; Weersink et al. 2018). Ontario craft brewers were subject to market access, direct sales, and advertising restrictions that limited growth and innovation opportunities. Production caps and tight quality control rules introduce other constraints. However, the distribution system may have been their most significant impediment.

In 1940, Ontario breweries acquired the private contractors distributing their beer, forming Brewers' Retail, later renamed The Beer Store (TBS) (McLeod and St. John 2014). Over time, ownership of TBS consolidated, leaving it controlled by only three firms – Molson Coors, Labatt, and Sleeman – the latter two being subsidiaries of larger multinational firms AB InBev and Sapporo, respectively, and Molson Coors being a multinational itself. Until legislative changes in 2015, home consumers could only buy beer onsite at the brewery, through Liquor Control Board of Ontario (LCBO) stores – owned by the Ontario government, or at TBS, which sold up to 90 % of the beer consumed in Ontario (Rubin 2024). TBS also charged craft breweries listing fees to sell products at their locations (Weersink et al. 2018). However, in 2015, Ontario's provincial government introduced arguably "the biggest change in beer distribution in Ontario since prohibition" (Johnson 2015). These changes primarily resulted from craft brewers' and their supporters' persistent lobbying. The actors advocated for policy reforms, secured tax breaks, and won the right to sell beer in grocery stores (Government of Ontario 2015), which increased consumer access and reduced the large breweries' stranglehold on sales through TBS. The brewers also won the right to direct sales through on-site brewery stores and could expand their market presence with sales at farmers' markets. Importantly, craft brewers secured means to establish collaborative distribution networks, further reducing their dependence on TBS. I propose that the industry's smaller-scale individual and collective institutional work effectively set the stage for the larger-scale collective institutional work that followed.

Craft brewing is consistent with the 'lifestyle' entrepreneurship business typology. This term describes businesses where entrepreneurs' primary motivations are intrinsic to their work rather than the profit motive (Ivanycheva et al. 2024; Roy and Bathelt 2024). Findings from other cultural markets show entrepreneurs may instead prioritize quality or tradition, they may have driving ethical concerns, or they may prioritize cultural and social capital over economic gain (Cadby et al. 2021; Evren and Akdoğan-Odabaş 2024; Pret et al. 2016; Roy and Bathelt 2024; Scott 2012). However, entrepreneurs in Ontario's oligopolistic beer market had a tough time starting and establishing strong and competitive businesses in their day-to-day business dealings. Further, the market share gained and craft brewers' success in educating the public and changing regulatory and distribution channels demonstrate how significant craft enterprises can be in contemporary economies. The ‘lifestyle’-label overlooks this and undermines the academic attention these firms and industries deserve.

2 Conceptual grounding

This section outlines the theoretical framework applied for this research. It describes how the relational economic geography and markets-as-practices perspectives consider economic and social processes to explain market development. It also examines institutional work and entrepreneurship, showing how Ontario craft beer industry actors could influence and transform institutions through their practices and interactions.

2.1 Institutions and markets

The research presented in this paper is grounded in Bathelt and Glückler’s (2011) relational economic geography perspective, which presupposes actual markets exist in real spatio-temporal contexts and develop through the interaction of actors and intertwined economic and social processes. The relational approach maintains that intersecting contextual path-dependent and contingent economic and social processes influence market development. Relations, actions, and interdependencies at the individual agent and firm level within specific localized contexts are crucial. The relational perspective provides a comprehensive research framework (Bathelt and Glückler 2018) that is well suited to identifying and understanding relationships, practices, and processes in particular localized market or industry contexts (Berndt and Boeckler 2009).

Institutions are a central consideration in a relational economic perspective. Because economic action is contextual, it is influenced by the institutions that intersect within that context (Bathelt and Glückler 2014, 2018). Bathelt and Glückler define institutions as “forms of ongoing and relatively stable patterns of social practice based on mutual expectations that owe their existence to either purposeful constitution or unintentional emergence” (2014, p. 346). They may develop based on laws, rules, or expectations (Bathelt and Glückler 2014; Loasby 2000) and are “formed as meanings come to be shared and taken for granted” (Hardy and Maguire 2008, p. 205). Once established, institutional contexts are relatively stable, changing more slowly than other socioeconomic processes (Bathelt and Glückler 2014). They are also normative; they guide decisions, partly because contravening them incurs some formal or informal, legal or social penalty. However, while institutions are structural arrangements that guide agents’ actions, they do not determine them. And because of their longevity, they offer assurance about an action’s likely outcome, facilitating decision-making (Araujo 2007). Thus, understanding institutions is integral to understanding markets.

Real markets change and can be (re)adjusted by the actors within them. Menard (1995, p. 170) defines markets as “a specific institutional arrangement consisting of rules and conventions that make possible a large number of voluntary transfers of property rights on a regular basis”. Callon (1998) asserts that agents (de)stabilize and (re)produce markets through their intentional practices. This view also forms the basis of the markets-as-practices perspective (Araujo 2007). Market practices can include diverse work through which agents create, maintain, and transform their businesses and markets (Kjellberg and Helgesson 2007; Roy and Bathelt 2024). They may include mundane day-to-day operations, pricing strategies, marketing and advertising, establishing distribution systems, R & D, regulatory compliance, or other activities. Thus, the focus is on firm-side practices rather than the consumers on the other side of the transfer, as defined above. Further, markets typically comprise a range of firms, each providing different goods and services required for the operation of that market. However, this paper focuses on the practices of the breweries in Ontario’s craft beer market and will often use the term *industry*, which more commonly describes a group of firms that produce similar products, to specify this group of actors within the market.

The markets-as-practices perspective agrees with Callon but also explicitly considers the role of institutions in markets, which Callon and related authors discuss less directly (Çalışkan and Callon 2009; Callon 1998; Callon and Muniesa 2005; Callon et al. 2002). If firms in a localized industry use a practice regularly, it may become institutionalized and subsequently be dispersed to other related actors in markets elsewhere. For example, research has identified inter-firm cooperative practices in craft beer markets across diverse, distant regions, such as the US (Flanagan et al. 2018; Mathias et al. 2018), Europe (Kraus et al. 2019), and Ontario (Roy and Bathelt 2024). While it is unclear from where these practices stem, and since more conventional competitive practices are typical in these areas, it is likely cooperation was institutionalized in a craft brewing market at some point and then dispersed as new localized markets were established (and possibly also back to earlier established ones). Although the local context influences the localized manifestation of institutionalized practices and likewise impacts particular events, institutions are stable and influential, linking these markets through space and over time.

This explanation raises two points. First, the sequence of events shows how insights from a localized case study, such as the Ontario craft beer industry, can be applied to other nearby or related distant markets. Second, it illustrates how a practice approach to markets can inform the study of institutional work, which I will discuss in greater detail below.

Markets are effective in part because actors share an understanding of local (market) institutions. Menard explains that institutions and markets operate at different levels, "with institutions being an overarching class" (1995, p. 163). Market institutions help agents "behave intelligently despite pervasive uncertainty" (Loasby 2000, p. 117) by limiting the choices they must consider. In a non-market environment (without institutions), there would be so many considerations that the transaction costs of making a decision would prove too high (Araujo 2007). Because markets have established institutions, they facilitate large numbers of transactions between agents more effectively than without them (Loasby 2000).

2.2 Institutional change

While stable, institutions can change, sometimes resulting in new institutions and markets (Baker et al. 2019; Bathelt and Glückler 2014; Loasby 2000). On the one hand, agents may seek to maintain the institutional status quo. On the other, reflexive and determined agents can extend progress away from the status quo (Bathelt and Glückler 2014; Lawrence and Suddaby 2006). Lawrence and Suddaby describe institutional work as "the purposive action of individuals and organizations aimed at creating, maintaining, and disrupting institutions" (2006, P. 215). In a subsequent paper that unpacks this definition and concept, Lawrence et al. (2009) show how even agents who do not make a conscious purposive effort toward an intended institutional work goal can nonetheless be considered as engaging in it. The authors also define institutional work as comprising a wide range of activities, from mundane day-to-day practices that sustain existing norms to strategic actions that challenge and alter institutional structures. Thus, we see a strong link between the markets-as-practices perspective and the institutional work concept. This link supports the choices and analysis in this research exploring how the practices agents in Ontario's craft beer industry engaged in institutional work, although the brewers did not necessarily set out in each instance with institutional work as an explicit goal. This paper examines how brewers' regular (institutionalized) market practices and other specific initiatives were institutional work that reinforced, disrupted, and changed the industry's institutional framework.

2.2.1 Institutional work and institutional entrepreneurship

Institutional work and institutional entrepreneurship are related but distinct concepts. As mentioned, Lawrence and Suddaby (2006) introduced the concept and term institutional work after earlier research on institutional entrepreneurship. Institutional work refers to the purposive actions of individuals and organizations aimed at creating, maintaining, or disrupting institutions. It emphasizes ongoing, everyday activities and practices that stabilize or change institutions. Institutional work has been further divided into two categories: 1.) institutional creation (described in this paper also as creative institutional work), which may result from "political actions, changes to actor belief systems, and changes to boundaries and abstract meaning" (Baker et al. 2019); and 2.) institutional disruption, which entails "attacking or undermining the mechanisms that lead members to comply with institutions" (Lawrence and Suddaby 2006, p. 235). Institutional work is also an umbrella term encompassing institutional entrepreneurship.

DiMaggio (1988, p. 14) devised the concept of institutional entrepreneurship to describe the process by which "new institutions arise when organized actors with sufficient resources (institutional entrepreneurs) see in them an opportunity to realize interests that they value highly". Subsequent research focused on individual agents leveraging resources and opportunities to create new institutions or transform existing ones (Hardy and Maguire 2008). This often involves visible, strategic actions such as framing issues, mobilizing support, and advocating for regulatory changes. Institutional entrepreneurs are depicted as key agents who initiate and lead institutional change by mobilizing resources and allies for their projects (Hardy and Maguire 2008; Lawrence and Suddaby 2006; Lawrence et al. 2009). In sum, institutional entrepreneurship is a specific form of institutional work describing individuals focused on establishing institutional change (Lawrence et al. 2009).

The concept of institutional entrepreneurship has been criticized for lionizing a few heroic, individualistic, or influential figures (Delmestri 2006; Lawrence et al. 2009). However, the research presented here shows that, in many cases, the founders of small craft breweries in Ontario acted not only individually, but also collectively to successfully change local institutions in their favor. This research recognizes the difference between institutional work and institutional entrepreneurship and acknowledges the valuable contribution of institutional work to institutional studies. However, it uses the term institutional entrepreneurship not to imply any powerful or heroic actions of individuals but as an appropriate concept to describe the work these small firms undertook. Thus, this research suggests that the blanket criticism of institutional entrepreneurship may be too harsh and that the use of the concept is justified.

Individual or collective actors working to disrupt or change institutions, including institutional entrepreneurs, often must mobilize resources, including materials, symbols, and people (Baker et al. 2019; DiMaggio 1988; Hardy and Maguire 2008; Lawrence and Suddaby 2006). Actors in craft and artisan markets who often have limited financial capital have been shown to sometimes rely on stores of cultural and social capital that they can convert into financial capital or trade in-kind for services or support they need (Pret et al. 2016). However, the firms with access to these resources tend to be large and established with little incentive to (help) make changes that hold the possibility of economic loss or instability (Hardy and Maguire 2008). Conversely, agents operating on the periphery of a market often have more to gain from institutional change, so they are motivated but also tend to have fewer resources available. This research describes how Ontario craft breweries mobilized resources to (re)establish localized market institutions.

Mobilizing people requires institutional entrepreneurs to communicate why the proposed changes or new institutions (or markets) are important (Hardy and Maguire 2008). Callon's (1998) explication of *framing* describes how institutional entrepreneurs may achieve these ends. Framing describes the process of defining agents, goods, and their relations as distinct, identifiable and separable. Some ways goods are framed and defined include formally through legal contracts defining property rights or patents and establishing fixed prices (Callon 1998; Callon et al. 2002). More informally, firms frame themselves and their goods as distinct from others via packaging and marketing. A real-world example of framing in institutional work is found in the history of institutional entrepreneurs disrupting the commercial whaling industry by reframing whale hunting as undesirable and promoting whale-watching as a positive eco-tourism and sustainable economic alternative for former whaling communities (Bathelt and Glückler 2014). In this paper, I explore how Ontario craft brewers framed their industry as having positive social and cultural impacts to mobilize needed resources and harness public awareness and support to disrupt and change existing regional market institutions.

Institutional entrepreneurs may also seek assistance from the government or other organizations (Hardy and Maguire 2008). Government endorsement can include regulatory and financial support, training opportunities, public acknowledgment, or other forms of help. Such endorsement was critical for the Ontario craft beer industry because of the heavy regulation of alcohol production, distribution, and sale in Ontario (Weersink et al. 2018). However, institutional creation through political action (Baker et al. 2019) requires industry momentum with sufficient firms and market influence to garner public support and prompt favorable government action and (re)legislation. Alternatively, institutional entrepreneurs may engage with other organizations, such as professional bodies or colleges, that can provide formalized training or public education, thereby lending greater legitimacy to a new market (Cohendet 2022; Cohendet et al. 2014).

Institutional work is complex. Likely more so for agents in markets with longstanding institutional frameworks preferencing large, influential incumbents, such as Ontario's craft beer industry. However, studying it informs us about a type of industry, mode of production, and market processes that economic geographers often overlook. Moreover, understanding localized business practices and institutional work informs how institutional arrangements develop and operate in other localized markets. In sum, this section describes how markets develop through the interactions and relationships of participating actors. It explains that agents actively shape and are shaped by their market contexts, partly through institutional work. It also explains how institutional entrepreneurship is a specific form of institutional work.

3 Methodology

A typical case study approach (Seawright and Gerring 2008) was used for this project. The research process began by reviewing academic and non-academic literature around craft brewing to: 1.) gain a better understanding of the industry in Ontario and elsewhere, and 2.) begin identifying and theorizing institutional conditions present in the industry locally and elsewhere. Because most of the academic literature focuses on the US market, Ontario-specific information was mostly gathered from non-academic sources, such as industry publications, government reports, and other media like newspaper and magazine articles, books, and websites.

Empirical research included 19 semi-structured interviews with key Ontario craft brewing representatives, owners and entrepreneurs, key employees (e.g. head brewers customer relations managers) and 1 policymaker.[1] Sample firms were drawn from the Mom and Hops Ontario Craft Brewers Directory, a website with a nearly comprehensive list of breweries in the province (Mom and Hops 2014).[2] Of the 275 craft brewers listed as open when interviews began, 205 met the definition of being small, independent and traditional.

Convenience sampling was used first to gather most interview participants. Over the summers of 2014–2016, I engaged with craft brewery operators by volunteering at local beer festivals. These festivals also provided an excellent opportunity to observe actors and interactions in the industry. During these events, I introduced the study to firm founders and head brewers and asked whether they might participate in interviews. After the event, I followed up again by email or phone with operators who expressed interest. Twelve interviews were arranged in this way. Six more interviews were secured by directly calling select breweries in the population. These additional firms were chosen partly to ensure a more diverse sample; consideration was given to the firms' location, for greater distribution across the province, and for the interviewee's gender, for greater diversity in the sample.

Interviews were held between January 2015 and July 2016. Each lasted an average of 60 min, ranging from 30 to 105 min. Eight were telephone interviews and eleven were in person. Of the in-person interviews, nine took place onsite at the breweries, one with an owner offsite, and one with a policymaker in his office. A semi-structured interview guide was used for the interviews, in line with standard qualitative research practices (Clark 1998). The interview questions were organized into eight categories: 1.) firm and participant background; 2.) market and logistics; 3.) firm identity and market development; 4.) competition; 5.) services; 6.) employees and training; 7.) industry institutional context; and 8.) participant, firm and industry future. The semi-structured approach facilitated a more open exchange with participants (Esterberg 2002), letting them respond in their own words, eliciting engaged responses, and providing valuable insights into the market from the participants' perspective. The interview process concluded upon reaching theoretical saturation of the project's questions (Eisenhardt 1989).

Analysis of the interview data followed a recursive approach to identify patterns and highlight significant comments (Yin 2009). Each interview was audio-recorded and transcribed initially in summary afterward. Sections that initially seemed important were next transcribed verbatim for more detailed analysis. A reference spreadsheet was then developed to track questions and corresponding responses to ensure a balanced data analysis. Findings were then written up using an iterative approach, writing and refining the findings by repeatedly comparing and cross-referencing the research questions, the reference document, and the write-up, along with listening to and transcribing the interviews again as needed.

This recursive approach helped me carry out a clear, accurate, and detailed analysis that revealed relationships and underlying causes in the findings. I then abductively connected these findings with existing theory (Easton 2010) – bridging the empirical evidence with existing theoretical frameworks – to hypothesize their most plausible explanations. This helped to generate a comprehensive understanding of events in the local industry and how they may connect to similar industries elsewhere. Although this method aimed to ensure that the write-up accurately reflected the data without biasing findings towards specific examples, it remained inherently subjective.

4 Empirical analysis of institutional work and institutional entrepreneurship in the Ontario craft beer industry

This research shows how Ontario craft brewers worked during the industry's high-growth stage in the early and mid-2010s to adjust local and regional institutional contexts. The empirical section discusses three aspects of the brewers' practices that were important to the institutional changes in the industry. It first discusses how Ontario craft brewers institutionalized norms around cooperation, competition, collaboration, and communication, enhancing the industry's potential for collective institutional work. It then shows how small craft brewers individually changed or established new legally regulated institutions in their communities. Some of these efforts align with the concept of institutional entrepreneurs as conceived in the literature

1 Most of the primary research for this paper was undertaken as part of my Master's work (Roy 2016). Some of the analysis and especially certain quotes included in this paper can also be found verbatim in that thesis. The same primary data and research was used as the basis for another paper on the industry (Roy and Bathelt 2024).

2 This website was rebranded as the Ontario Craft Brewery Network in 2015.

(DiMaggio 1988; Hardy and Maguire 2008), though on a more limited scale. The changes entrepreneurs ushered in also strongly indicate components of collective institutional work. Finally, I describe how craft brewers and other agents in the market gathered resources to support these changes, connecting and helping explicate both previous sections. Although discussed separately, the efforts described in each section were likely often ongoing concurrently with feedback between the various activities and no strict chronological order is implied or should be inferred.

4.1 Industry norms

Ontario's craft brewing industry is notable for its competitive landscape. On the one hand, in line with orthodox economic assumptions (Lipsey and Ragan 2011), interviews revealed that 15 of 17 breweries identified macrobreweries specifically as their competition. Some nuances include one brewer saying. "Within craft brewing, it seems kind of like 'us and them' … as a collective, the big guys are what we are competing against," or "All of our competition is the big guys". At the same time, two participants considered only premium domestic beers as competition, and another focused on the issue of 'faux' craft beers.[3] This type of unified competition can be understood as the result of collective work to institutionalize competitive practices directed outside the craft beer industry, which minimized intra-market rivalry and maximized craft brewers' impact on the conventional beer market.

On the other hand, contrary to orthodox economic assumptions (Lipsey and Ragan 2011), nearly all participants indicated that they avoid competing with other craft brewers for customers. Instead, breweries wished other craft brewers to be successful, echoing the sentiment, "A rising tide floats all boats." One owner, who couched his response in a sports metaphor, captured the industry ethos: "Imagine that we both play for the [Toronto] Raptors … I want to score more points than you on our team … but we are both out to beat Cleveland". Research has identified a similar ethos of goodwill in other craft beer markets (Mathias et al. 2018) and various craft industries (Brewer 2017; Gibson 2016; Luckman 2018). Ontario craft brewers institutionalized supportive practices and directed competitive efforts away from each other, viewing these industry characteristics as strengths and likely building the foundation for collective institutional work.

The industry is notable for institutionalizing open communication and inter-firm collaboration. Every interviewee referenced examples of these characteristics. Information and resource sharing occurred through formal channels like the Ontario Craft Brewers (OCB) – the province's major industry association that offered information about events and presented a unified industry voice. Informally, firms collaborated when they shared space and equipment, for example, when one brewery was brewing at another brewery location while waiting for licensing. The firms also collaborated on recipes and brewing 'collabs': 10 participants collaborated on beers, and all but one intended to do so. They also frequently consulted on day-to-day problems and sought advice from other brewers, with one noting, "We do a lot of thought sharing and information sharing in terms of processes or people. Every week there is a call that goes out or a call that comes in from another brewery asking a question." Tours of other breweries were common, with experienced brewers offering advice and suggestions for equipment customization. As one brewer noted, "It is a very collegial industry, as most are when it is little guys against big guys." The widespread adoption of these supportive practices indicates their institutionalization, explaining the low intra-market rivalry and likely forming a basis for effective collective institutional work.

At the same time, interviews indicated that localized informal market institutions were changing in another direction. One Ottawa brewer mentioned increasing price competition among craft breweries in his region. Despite laws prohibiting it, macrobreweries often "buy taps" from bars with cash for exclusive sales rights. For example, the owner of a brewery in an Ontario resort town said several bars there were "off limits" to craft breweries because of such deals. Licensee kickbacks, like 'buy X number of kegs, get one free,' were common tactics macrobrewers used. That these technically illegal practices were accepted in the industry shows they were being institutionalized. It also shows how active institutions may not follow formal laws (Bathelt and Glückler 2014). Participants who mentioned this said that craft breweries were beginning to adopt these tactics to attract initial licensees as the market saturated despite the futility of competing with macrobrewers on price. For example, one participant mentioned that his firm's early sales were challenging because they had not built a reputation yet, and cash incentives were a way to overcome licensees' hesitancy about them.

Likely due to increasing market saturation or more concerted effort from macrobrewers, some brewers were beginning to adopt conventional market practices that contravened institutions directing competitive efforts outside

3 These are beers brewed by macrobrewers but marketed as craft-produced.

the craft beer industry. Nonetheless, the industry has a history of institutionalized practices such as open communication, inter-firm collaboration, and a unified front against macrobreweries. These practices created strong connections among the brewers, unlocking the potential for and facilitating the collective institutional work that realized changes in provincial regulations of the type Glückler and Eckhardt (2022) suggest is unlikely in an oligopolistic beer market.

4.2 Institutional entrepreneurship for regulated institutional change

As Ontario's craft beer industry expanded, new breweries were often the first of their kind in smaller communities. The founders of these breweries faced institutional hurdles in the form of: 1.) legally regulated institutions that were non-existent, inapplicable, or prohibitive of their business, 2.) existing social institutions that manifested themselves as public hesitancy about the nature of these firms and pushback on them. Founders worked with and lobbied local officials for regulatory adjustment while also engaging with the public in creative ways to change their perception of the firms, and ultimately ingratiate themselves with the community by encouraging local regulatory change.

Participants from smaller towns and rural areas indicated that regulations and public acceptance in these types of localities were still problematic in the 2010s, and they were working to improve institutional conditions. One brewery founder in rural Eastern Ontario faced legal and bureaucratic challenges in 2013 but overcame these through determination and efforts to engage the community positively. These efforts included buying local inputs, contributing to charities, and using donations from their beer delivery service to support local causes, including a youth sports camp, part of a staff member's tuition at a college-level brewing program, and environmental maintenance. The founder shared, "We had to explain not only our business model but also reassure the community about the positive impact we intended to bring." Two other breweries donated taproom tips to charities, with one participant explaining that they paid their staff fair wages, so the tips were an opportunity for positive community impact. Several other participants more generally described their efforts to influence their communities positively.

The industry's youth meant new firms were regularly opening in areas with little or no first-hand experience with craft brewing, requiring change or the creation of new regulated institutions. Participant responses show how they leveraged social engagement to engender social goodwill in their localities. These examples of creative institutional work (Baker et al. 2019) align with the definition of institutional entrepreneurs as individual agents leveraging resources and opportunities to create new institutions or transform existing ones (Hardy and Maguire 2008). Nonetheless, these agents were acting at a local scale, and their focus was on regulations of small individual municipalities, so less far-reaching than critics of the concept typically argue (Delmestri 2006; Lawrence et al. 2009; Leca et al. 2008).

Approval processes in larger urban areas with many craft breweries were also challenging. Interviews revealed that some firms in Toronto (with 27 brick-and-mortar breweries operating then) still found the regulatory process confusing. Having a taproom (a space where customers can drink beer and sometimes eat food) compounded the difficulty. For example, a brewery with a taproom legally differed from a brewpub as they required different licenses, but no formal regulation distinguished the two. However, breweries in Toronto also generated sufficient public interest to garner the political support of City Councilor Mike Layton, who championed their efforts at City Hall. Councilor Layton formed 'Cask Force' in 2015 to address the zoning and licensing issues the breweries faced. In 2017, official requests were made proposing significant zoning by-law amendments based on consultation with local craft brewers and public consultation, which were then endorsed in 2019 (City of Toronto 2019). Thus, participant responses suggest that numerous Toronto breweries engaged in collective institutional work, leveraging the social and political power they gathered to adjust existing legally regulated institutions.

Together, these interviews show how Ontario craft brewers worked individually and collectively for specific changes and suggest, in combination with the collaborative nature of the industry described above, how they succeeded in the collective institutional work that triggered significant regulatory changes in 2015. Once again, this collective institutional work counterbalances Glückler and Eckhardt's (2022) claim that such work and results are unlikely in this type of industry.

4.3 Mobilizing resources

Actors engaging in institutional work to disrupt or change institutions must mobilize materials, symbols, and people to change the status quo (Hardy and Maguire 2008). This can be a challenge for new or small firms, like the craft breweries studied here, because they often do not initially have significant financial capital or public sway. These entrepreneurs must work to establish vectors to acquire the financial capital or leverage the cultural or social capital they require to frame their market (Bourdieu 2018; Pret et al. 2016) to rally public support around their efforts. This section explores the practices actors in the Ontario craft beer market engaged in to mobilize resources needed for their work, partly discussed above, disrupting, changing, or developing favorable, localized institutional arrangements. I claim these efforts are illustrative of the collective institutional work the brewers engaged in and that the resources they gathered were instrumental in the success of the institutional work described above.

4.3.1 Financial capital

Institutional entrepreneurs establishing new markets often have fewer material resources than established dominant actors interested in maintaining the status quo (Hardy and Maguire 2008). This was the case in the craft beer industry, the history of which is replete with stories of outsiders scraping together scant finances and cobbling together equipment in ramshackle industrial spaces to brew their first beers (e.g. Acitelli 2013; Calagione 2011; McLeod and St. John 2014; Sneath 2001). In the Ontario market, this process appears to have been less romantic. Although one participant scoffed at the idea that the bank would have lent his venture money, theirs is one of the province's oldest breweries, dating from the 1990s. My interviews suggest that changes in the social perspective on craft brewers and official perspectives on them have made financial capital more readily available in Ontario since then.

Most brewery founders indicated they relied on typical sources of small-business start-up capital, including personal savings, friends and family members, bank credit, and government loans. Two breweries mentioned substantial government grants and incentives that helped them purchase equipment. Another brewer, who founded their firm in a small cottage-country town shortly before the craft brewery boom, said they thought it was harder to secure initial funding then, but "now the money seems more readily available". Despite craft breweries being capital-intensive and competing with large corporations that spent millions on marketing and acquisitions (Sneath 2001), Ontario's craft brewery entrepreneurs felt the industry had better access to financial capital in the mid-2010s than before.

According to my interview, actors in the Ontario craft brewing market have seemingly contributed to triggering this change at a government level and among formal lenders. Participants who started their breweries earlier had greater difficulty securing funding from the government or banks than did later entrants. While the particular practices, institutional work, or other causes that effected these changes are not fully clear, other findings from this research illustrating collective and entrepreneurial institutional work in lobbying government and building goodwill and trust with the public suggest brewers' efforts were significant.

4.3.2 Pro-social efforts

Social capital (Bourdieu 2018) can help institutional entrepreneurs build legitimacy, spark collaboration, mobilize public support, and leverage political influence, among other benefits (Pret et al. 2016). It can be traded or assist in trade for financial resources, expertise, and connections invaluable for driving institutional change. This paper has described numerous instances of craft brewers building and trading social capital. Other actors in the market also contributed to these efforts. For instance, the OCB mobilized public support by emphasizing the industry segment as a driver of localized employment growth and community renewal. At least by 2006, the OCB had begun putting out media releases highlighting the industry's contribution to local employment, reporting a 17 percent increase from the previous year, with more than 450 people employed, accounting for 20 percent of all direct brewery employment in the province (The Bar Towel 2006). The OCB periodically released this type of media information, and in one release from 2015 (Ontario Craft Brewers 2015a), announced that growth in craft beer retail channels "would double or triple the 1,000 plus full-time direct brewery jobs that craft brewers currently provide throughout large and small communities" – an imprecise but confident claim. Regular media reports framing craft breweries as drivers of employment in the early and mid-2010s mobilized public and government support and drove institutional work success.

A more sweeping effort to present the industry in a positive light is found in another OCB press release from 2015 (Ontario Craft Brewers 2015b), in which they claim:

> There are currently over 100 craft breweries in Ontario employing over 1,000 people in direct brewery jobs across the province … When a craft brewery opens in a community, particularly outside of a major urban area, it becomes an anchor business for that community and a catalyst for growth … Breweries attract new development in associated sectors such as agriculture, tourism and culinary arts … Craft breweries are bringing new life and energy to Ontario towns and cities … They have become an important employer in the community, hiring local talent and contracting local suppliers … This helps stimulate the economy as

> these professionals, in turn, spend money and pay income taxes in their own communities … Craft brewers also use local ingredients such as barley, hops, spices and fruit whenever possible … They are excellent tourism generators … They host festivals that draw visitors to a region … Not only are Ontario Craft Breweries making great beer, we're making Ontario great.

The above quote claims that craft breweries improve their communities socially, culturally, and economically, presenting the breweries as a panacea for troubles that shrinking Ontario communities face (Bourne and Simmons 2003). Regardless of their validity, germane to this study is how strong efforts were to frame the industry as having positive local impacts to build public support for their institutional goals and thus support individual entrepreneurs' efforts to develop a sustainable business in an industry dominated by multinational enterprises.

My interviews indicated that craft breweries often participate in local community events like those suggested above. Moreover, in some cases, participants indicated their foremost motivation was to help improve those communities. For example, when asked why their firm participates in community events, the owner of a small brewery in the Ottawa region said, "To help grow the community and be a good positive thing in the local area … to do our part". In response to the same question, the owner of a Toronto brewery said, "It is important to be a part of your community in the ways that you can". And again, another said, "That is something we strongly believe in … we want to support our local community, we want to use local ingredients where we can … [that is] what we have been doing for the last 20 years." These were not isolated responses; they typify the general views participants expressed. The brewers' intentional practices to have a positive social impact indicate that at least some of the framing of the market as 'local' and socially beneficial accurately reflects the firms' efforts. The brewers' pro-social practices and the public framing of those practices are separate, related examples of institutional entrepreneurs engaging in creative institutional work (Baker et al. 2019) that built social capital and gathered public support they could leverage for institutional change.

These examples show that the OCB, an agency with a vested interest in the market, presented the market such that it would be perceived positively by two groups: 1.) consumers and 2.) the general public. To the first group, they presented craft beer as an alternative to conventional beer. For the second group, they presented the market as a whole as offering diverse social and economic benefits. Regardless of the accuracy of these claims, the OCB presented them in such a way as to promote the market and generate the support needed to adjust aspects of the existing institutional framework that was established by and for the large conventional brewers. These efforts certainly align with the concept of collective institutional work and may align with the more typical description of influential institutional entrepreneurs who construct meaning to mobilize people behind their efforts (DiMaggio 1988; Hardy and Maguire 2008; Lawrence et al. 2009). The growth in craft breweries, increased sales, and success in changing legislation show that the brewers' work was successful. These examples also demonstrate how and why it is that this particular localized industry was able to achieve institutional change that was not possible in brewing industries elsewhere (Glückler and Eckhardt 2022).

5 Conclusions

This empirical qualitative paper investigates the Ontario craft beer industry during a time when the industry was experiencing significant growth. Findings are primarily based on 19 interviews with key industry participants supplemented by other qualitative research. Historically, Ontario's beer market is best described as oligopolistic, traditionally dominated by a few large multinational firms. This study addresses calls for more spatiality in critical market studies (Berndt et al. 2020) and increased attention on craft firms in entrepreneurship and innovation studies (Hasanah et al. 2023; Pret and Cogan 2019) by providing insights into the practices and impacts of Ontario craft brewers. The paper addresses two primary research questions: how did Ontario craft brewers create new institutions and disrupt and replace existing regulatory institutions in their localized oligopolistic market? And did the collaborative nature and pro-social initiatives of Ontario craft brewers facilitate collective institutional work that led to these changes?

I argue that actors in the craft beer market engaged in collective institutional work and sometimes acted as institutional entrepreneurs to establish a distinct institutional environment. Ontario craft brewers faced a complex and incomplete regulatory system, local governments that were often unfamiliar with or hostile towards them, and a distribution system designed by and for their competitors in the conventional beer market. My analysis of participant responses shows that the brewers engaged with the public and lobbied local governments in their efforts toward regulatory changes. These efforts created a more favorable institutional environment.

My interviews reveal an industry with a deeply collaborative nature that broadly engaged in pro-social initiatives crucial in gathering public support, thereby facilitating collective institutional work. Brewers shared resources, collaborated on brews and discussed best practices. They supported each other, building a united front against the macrobrewers, strengthening the industry against these massive competitors and increasing their ability to effect change. Some examples of the brewers' mutually supportive practices include sharing space and equipment, consulting on day-to-day problems, and working together to advocate for regulatory change. The brewers harnessed public goodwill and political support through pro-social actions like participating in local events and supporting local causes.

I find that craft brewers institutionalized collaborative and cooperative tendencies among themselves while maintaining a competitive position against conventional brewers. This unity helped them engage in collective institutional work, gathering resources and support to change the regulatory framework designed for and supporting the conventional brewing industry. The brewers' engagement in pro-social business practices generated public goodwill towards them. Moving from Glückler and Eckhardt's (2022) claim that institutional change would be unlikely in an oligopolistic market like the brewing market, I show how the cohesive nature of this particular localized industry helped the brewers collectively gather resources and support, leading to the disruption and change of the existing regulatory framework designed to support the conventional brewing industry. Examples of individual work to change institutions also support my contention that the blanket criticism of institutional entrepreneurship (Delmestri 2006; Lawrence et al. 2009; Leca et al. 2008) is unwarranted and that the concept deserves reconsideration.

This research suggests several practical policy applications. First, it is important to establish local third-party or arm's length organizations to support small and diverse craft production industry groups in their regions. An organization like this might look for overlapping input or distribution needs or pool resources. It could organize small business training and other standard market solutions. Importantly, it could advocate for craft producers' interests, ensuring their sustainability and growth. Policymakers should more explicitly recognize how craft and artisan producers are important in our economies. This project shows how some craft entrepreneurs were engaged with their communities and genuinely interested in improving them. Therefore, policy interventions supporting craft firms' unique challenges would also support market-based community improvements.

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