Schwartz' Values and Motivation Theory

Abstract Shalom H. Schwartz' values and motivation theory constitutes the conceptual backbone of this book. This chapter introduces the reader to both the early and the refined version of the theory. It provides an overview of the various values and sub-values and the dynamic relationship between them. Schwartz arranges the values on a circular motivational continuum. Attending to this continuum, the chapter illustrates the existence of two underlying bipolar dimensions, namely, (a) self-enhancement vs. self-transcendence and (b) change vs. conservation.

Keywords Shalom H. Schwartz • Values and motivation theory • Circular motivational continuum

THE ORIGINAL AND THE REFINED THEORY

The theoretical framework of this book does not only refer to current social entrepreneurship and B Corp literature but further addresses psychological literature, particularly the original value theory developed by Schwartz (Schwartz, 1992; Schwartz et al., 2012). In motivational research on social entrepreneurs, this theory has been applied to a quantitative research strategy only (e.g. McCabe, 2012). However, Schwartz' concept and dynamic structure of values and derived motivational goals are also considered to be beneficial for the theoretical orientation of the present study.

Drawing on Schwartz and Bilsky (1987, 1990), the values and motivation theory departs from the assumption that all individuals and societies must respond to three universal requirements of human existence: (a) needs of individuals as biological organisms, (b) requisites of coordinated social interaction, and (c) welfare and survival needs of groups (Schwartz, 1992). Seeking to provide a set of values that help people to collectively cope with these requirements and that are valid in all societies, Schwartz (1992) suggests and tests ten universal values recognized in any culture. These values are considered to be the socially desirable concepts that people use to mentally represent motivational goals. Furthermore, values are the vocabulary available to people to express motivational goals in social interaction (Schwartz, 2012). The theory defines each value referring to the particular motivational goals that underlie the value (Schwartz, 2012). For example, the value "stimulation" is defined by the underlying motivational goals of "excitement, novelty, and challenge in life" (Schwartz, 2012, p. 5). The value "security" instead expresses the need for safety, harmony, and stability (Schwartz et al., 2012).

Schwartz et al. (2012) refined the original theory as a response to difficulties differentiating between some of the original values. They argue: "because the 10 values have fuzzy boundaries, some items inevitably also express elements of the motivations of adjacent values" (p. 668). Therefore they suggest to further subdivide some of the values like "power" into power-dominance, power-resources, and power-face. The value "security" is further distinguished into "security-personal" and "security-societal." Refining some of the original values, the revised theory allows scholars to better discriminate between them (Schwartz et al., 2012). The present study considers the refined theory of basic individual values appropriate due to the finer subdivision of assumed central values in B Corp entrepreneurship such as universalism, benevolence, and self-direction derived from existing research evidence in SE. The following description of the values and the related motivational goals that they express, therefore, follows Schwartz' (1992) original distinction of ten values and indicates respective sub-values of the refined theory (Schwartz et al., 2012) through a, b, and c.

Values and Sub-values

1. *Self-direction*

    (a) *Self-direction-thought*: Derived from biological needs for control and the pursuit of intrapersonal mastery, the motivational

goal of this sub-value is freedom to developing and under-standing one's own ideas, thought constructs, and intellectual competence. Components are creativity/imagination and curiosity/interest. This sub-value refers to an intrapersonal competence and not an external assessment (Schwartz, 1992; Schwartz et al., 2012).

(b) *Self-direction-action*: Likewise derived from the same biologi-cal needs, the motivational goal of this sub-value is the free-dom to determine one's own actions, that is, exercising one's capacity to attain self-chosen goals and concomitantly choos-ing one's own purposes. Independency and the reliance on oneself are central components. Again, this sub-value refers to an intrapersonal competence and not to an external assessment (Schwartz, 1992; Schwartz et al., 2012).

2. *Stimulation*: Derived from the biological need for an optimal level of arousal conditioned by social experience, individual dif-ferences arise in the motivation to attain excitement (stimulating experiences), novelty (variety in life/change), and challenge (dar-ing/seeking adventure) in life (Schwartz, 1992; Schwartz et al., 2012).

3. *Hedonism*: The motivational goal of hedonism is attaining plea-sure and sensuous gratification for oneself (Schwartz, 1992; Schwartz et al., 2012). It is not to be confused with happiness, which, according to Schwartz (1992), finds its attainment in the pursuit of any of the ten values and is positively correlated with all of them.

4. *Achievement*: This value refers to performance motivation and implies the strive for personal success according to social standards and being judged as successful by others (Schwartz, 1992; Schwartz et al., 2012).

5. *Power*:

(a) *Power-dominance*: The power to limit others in their choices entails the goal to exercise control over people (Schwartz, 1992; Schwartz et al., 2012).

(b) *Power-resources*: The power to control materials and social resources expresses the motivation to control events (Schwartz, 1992; Schwartz et al., 2012).

(c) *Power-face*: This sub-value expresses aspects of security as well as power values. The motivational goal of attaining security and power is to maintain one's public image/social status and prestige, and avoiding humiliation (Schwartz, 1992; Schwartz et al., 2012).

6. *Security*: The need for safety, harmony, and stability is divided into safety needs directed towards the self and towards others.

    (a) *Security-personal*: The motivation of safety in one's immediate environment includes a sense of belonging, the feeling that others care about oneself and about health, cleanliness, and reciprocating favors. Safety for family and loved ones is part of security-personal (Schwartz, 1992; Schwartz et al., 2012).
    (b) *Security-societal*: The defined goal of safety and stability in the wider society includes national security, and social order and stability (Schwartz, 1992; Schwartz et al., 2012).

7. *Conformity*:

    (a) *Conformity-rules*: The compliance with rules, laws, and formal obligations has the motivational goal to exercise self-discipline and obedience in everyday interaction (Schwartz, 1992; Schwartz et al., 2012).
    (b) *Conformity-interpersonal*: The avoidance of upsetting or harming other people strives for politeness, honoring, and respect towards others while restraining actions and impulses that are likely to provoke the contrary (Schwartz, 1992; Schwartz et al., 2012).

8. *Tradition*:

    (a) *Tradition*: Maintaining and preserving cultural, family, or religious traditions entails the motivational goal of respect, commitment, and the acceptance of one's portion in life. It also includes items related to religious faith (Schwartz, 1992; Schwartz et al., 2012).
    (b) *Humility*: The recognition of one's insignificance in the larger scheme of things entails modesty, self-effacement, submitting to one's life circumstances, and not to draw any attention to the self (Schwartz et al., 2012).

9. *Benevolence*: The care for in-group members is often referred to as prosocial motivation.

    (a) *Benevolence-dependability*: This sub-value is defined as being a reliable and trustworthy member of the in-group. The derived motivational goal is to act as a responsible and loyal friend (Schwartz, 1992; Schwartz et al., 2012).

    (b) *Benevolence-caring*: Devotion to the welfare of in-group members is another prosocial value type. The motivation derived therefrom is preserving and enhancing the welfare of people one is in frequent contact with (Schwartz, 1992; Schwartz et al., 2012).

10. *Universalism*: While benevolent values have a narrower focus on in-group members, universalist values include caring for people and nature outside of direct contact, which happens once individuals become aware of the life-threatening scarcity of global resources.

    (a) *Universalism-societal concern*: This sub-value finds its motivational expression in the commitment to equality, justice, and protection of all people (Schwartz, 1992; Schwartz et al., 2012).

    (b) *Universalism-protecting nature*: This sub-value expresses the motivation of preserving and caring for the natural environment and the attempt to fit into nature (Schwartz, 1992; Schwartz et al., 2012).

    (c) *Universalism-tolerance*: The motivational goal of this sub-value is the acceptance and understanding of those who are different from oneself (Schwartz, 1992; Schwartz et al., 2012).

The Dynamic Structure of Values

In addition to identifying the content of the basic and sub-values, the theory also attends to the dynamic structure of the values (see Fig. 4.1). Schwartz (2011) emphasizes that the ten distinct basic values the theory identifies form a continuum of related motivations which can be depicted in a circular structure.

Values that refer to similar motivational goals are deemed to be compatible (Schwartz, Caprara, & Vecchione, 2010). Hence, they are posi-
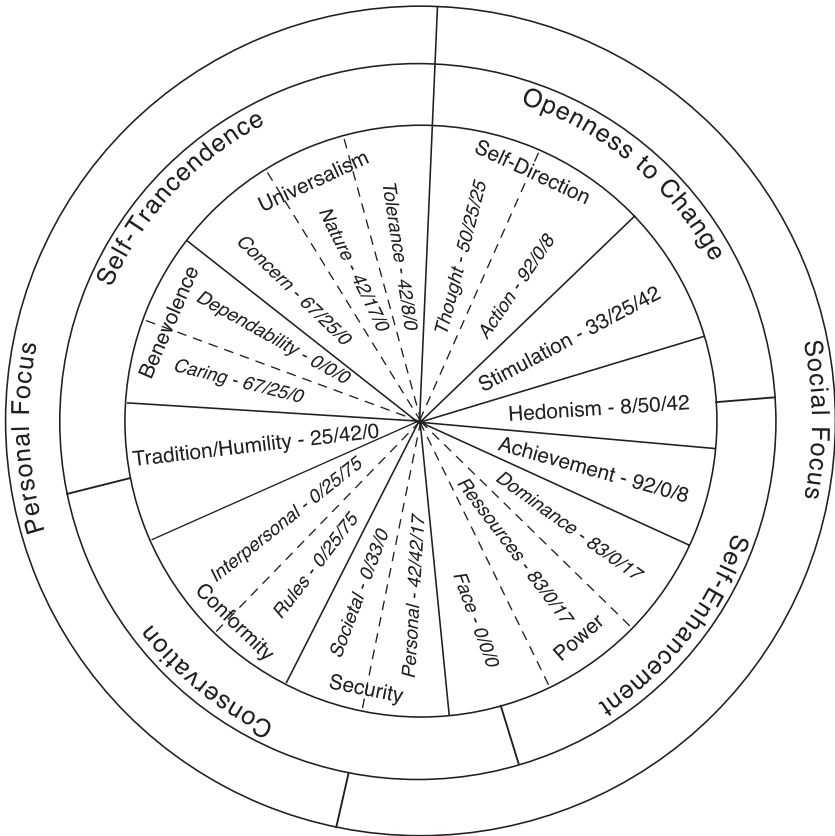
Fig. 4.1 The circular motivational continuum (adapted from: Schwartz et al., 2012)

tioned next to each other as they inform similar perceptions, preferences, and behaviors (Borg, Bardi, & Schwartz, 2017). Values that refer to oppositional motivations are located on opposite sides of the continuum. For example, both power and achievement express the motivational goals of social superiority and esteem and can be attained through similar actions (Schwartz, 1992, 2012). In contrast, while achievement implies the strive for personal success, the opposite value "benevolence" expresses the motivational goal of enhancing the welfare of others. Overall, as Fig. 4.1 depicts, the theory suggests the existence of two underlying bipolar

dimensions, namely, (a) self-enhancement vs. self-transcendence and (b) change vs. conservation (Schwartz, 1992, 1994). These dimensions refer to higher-order values along which basic values are grouped (Schwartz et al., 2012). Self-enhancement refers to values emphasizing dominance over others and pursuit of own success, whereas self-transcendence indicates a motivation in acceptance of others and an interest in their welfare. Openness to change indicates independent thought and action and readiness for change, while conservation values stress stability and submission to tradition. Furthermore, Schwartz (1992, 2010) and Schwartz et al. (2012) demonstrate that the left half of the circle depicts values that serve primarily self-interest. These self-directed values are power, achievement, hedonism, stimulation, self-direction, and personal security. The right half of the circle comprises the values that serve primarily collective interests, that is, universalism, benevolence, tradition, conformity, and social security. This distinction is important for the study of B Corp entrepreneurs as previous research assumes that actors in the domain of social business are concerned with both, outcomes for self and outcomes for others.

As the values in the circular structure can express similar or opposing motivational goals, actions in pursuit of some values have consequences that are congruent with adjacent values but in conflict with competing values (Schwartz, 2012). Actions to pursue the value of achievement, therefore, also contribute to pursuing the adjacent and, hence, compatible values of power and hedonism. In contrast, actions in pursuit of achievement, a self-directed value, have consequences that are in conflict with competing collective values such as benevolence and universalism (Schwartz, 1994). Hence, choosing actions that promote certain values has practical, psychological, and social consequences (Schwartz, 1992). The outcomes associated with pursuing one value while violating a competing one could become a manifest in psychological dissonance or social sanctions (Schwartz, 2012). For B Corp entrepreneurs, who are expected to have both a self and a social-orientation, pursuing self-directed values, hence, a concern for the self, may have conflicting outcomes with the simultaneous pursuit of collective values.

References

Borg, I., Bardi, A., & Schwartz, S. H. (2017). Does the value circle exist within persons or only across persons? *Journal of Personality, 85*(2), 151–162.

McCabe, L. (2012). *Human values of entrepreneurship: An empirical analysis of the human values of social and traditional entrepreneurs* (Unpublished doctoral dis-

sertation). Regent University, School of Global Leadership & Entrepreneurship, Virginia Beach, VA.

Schwartz, S. H. (1992). Universals in the content and structure of values: Theoretical advances and empirical tests in 20 countries. In M. P. Zanna (Ed.), *Advances in experimental social psychology* (Vol. 25, pp. 1–65). Academic Press.

Schwartz, S. H. (1994). Are there universal aspects in the structure and contents of human values? *Journal of Social Issues, 50*(4), 19–45.

Schwartz, S. H. (2010). Basic values: How they motivate and inhibit prosocial behavior. In M. Mikulincer & P. R. Shaver (Eds.), *Prosocial motives, emotions, and behavior: The better angels of our nature* (pp. 221–241). Washington, DC: American Psychological Association.

Schwartz, S. H. (2011). Studying values: Personal adventure, future directions. *Journal of Cross-Cultural Psychology, 42*(2), 307–319.

Schwartz, S. H. (2012). An overview of the Schwartz theory of basic values. *Online Readings in Psychology and Culture* (Article 11). Retrieved from https://scholarworks.gvsu.edu/cgi/viewcontent.cgi?article=1116&context=orpc

Schwartz, S. H., & Bilsky, W. (1987). Toward a universal psychological structure of human values. *Journal of Personality and Social Psychology, 53*(3), 550–562.

Schwartz, S. H., & Bilsky, W. (1990). Toward a theory of the universal content and structure of values: Extensions and cross-cultural replications. *Journal of Personality and Social Psychology, 58*(5), 878–891.

Schwartz, S., Caprara, G., & Vecchione, M. (2010). Basic personal values, core political values, and voting: A longitudinal analysis. *Political Psychology, 31*(3), 421–452.

Schwartz, S., Cieciuch, J., Vecchione, M., Davidov, E., Fischer, R., Beierlein, C., et al. (2012). Refining the theory of basic individual values. *Journal of Personality and Social Psychology, 103*(4), 663–688.