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In recent years among researchers concerned with migration, dispersed ethnic groups and multiculturalism high popularity has gained the concept of ‘transnationalism’. A new analytical research approach assumes that as a result of increasing migration flows and differentiation of ethnic populations there have developed new forms of socio-cultural, economic and political activities of migrating individuals that cross countries’ borders. As noted by Alejandro Portes, one of the theoreticians of the new concept, transnational activities can be defined “as those that take place on a recurrent basis across national borders and that require a regular and significant commitment of time by participants” [1999, p. 464].

In this context, the objective of the article is thus to demonstrate what new arrangements the increasingly popular transnational perspective introduces to studies of migration, ethnicity and multiculturalism. It will be also important to stipulate the usefulness of transnationalism in studying of individuals’ life strategies while staying abroad. Furthermore, as the new concept raises many controversies, it will be necessary to present critical approach towards transnationalism.

1. Intensification of migrations

Migration, both within and between countries, is obviously not a new phenomenon. For centuries movement of people across borders was a manifestation of existing socio-economic disparities and individuals’ seeking better living conditions and security. In the post-Cold War period, however, migration adopted a new character resulting from advancing processes of globalization. Nicholas Van Hear has distinguished four novel phenomena that gave migrations a new dimension and contributed to their intensification, and consequently – an increase of interest among researchers [1998, p. 2]. The first
factor has been the technological revolution in the area of communication and transport, as a consequence of which information about new (real or imagined) opportunities in other countries has become more accessible and cheaper to large parts of the world’s population. The emergence of technological innovations have contributed notably to the increasing migratory flows from countries of the “South” (the developing countries) to the “North” (the developed countries). Another feature in raising the importance of global migration movement has made the political constraints of mobility loosened after the collapse of the communist bloc, marking out new areas of migration on an East-West direction. Liberalization of political regimes in Asian countries (particularly in China) may further intensify movement of migrants. Third factor has been the rebirth of nationalist, ethnic and religious aspirations and tensions, resulting in destabilization of nation-states and further forced migrations. The fourth and final factor has been the “rights revolution”, i.e. the diffusion of individual rights and entitlements (such as polyethnic rights and anti-discrimination policies), but also the growing importance of ethnic, migrant and refugee lobby groups (especially in host countries) that often facilitate migration. It also results in growing migrants’ capacity for political organisation in both sending and receiving countries [Van Hear 1998, p. 3; see also Faist 2006, pp.3–4; Vertovec 2001, p. 573].

Following the processes described above, increasing numbers of people move to countries of settlement (and back to their countries of origin) with unprecedented ease. Furthermore, new communication technologies allow migrants to maintain free contacts with family or friends in their homeland. However, freedom of crossing the nation-states’ borders does not only apply to people, but also to goods, financial capital, technology, ideas and cultural patterns [Trąbka 2009, p. 74]. On the other hand there are also new factors that inhibit migration. Part of receiving countries that have accommodated migrants in the past are now proving unable or unwilling to accept successive waves of newcomers, pointing to the limited absorption of labour by local economies. Growing negative perception of migrants in political, social and security terms, as well as a general failure of foreigners’ integration in the developed countries further constrain free movement of people. As a result, paradoxically there are more and more migrants but at the same time a shrinking number of places where they could settle down [Van Hear 1998, p. 3].

2. Transnational approach

One of the consequences of intensification of global migrations in recent decades is a creation of new forms of mobility across national borders – transnational migration. This new approach to migrants’ activities is associated with the change of understanding the concept of migration itself. Since the beginning of the XX century scholars’ interests were mainly focused upon migrants’ assimilation
processes in their places of settlement. However, in early 1990s researchers on migration noticed importance of migrants’ stable attachments to families, communities, traditions and cultures outside the countries to which they have moved [Vertovec 2001, p. 574]. At the same time scholars started to note that both differentiation between migrants and people staying in sending countries as well as assimilation concept that predominated in studies of migration, ethnicity and multiculturalism are theoretically and ideologically inadequate [Kołbon 2006, pp. 203–204].

The first researchers to conceptualize a new phenomenon of transnationalism in beginning of 1990s were Americans, anthropologist Linda Basch, Nina Glick Schiller and Cristina Blanc-Szanton, who conducted research on migrants from Latin America and Asia living in the United States [Trąbka 2009, p. 74]. Other notable scholars who have later contributed to the development of the transnational perspective were Alejandro Portes, Peter Kivisto, Thomas Faist and Steven Vertovec. From the very beginning the new approach has been raised many controversies. For many scholars it has appeared as a methodological revelation giving a fresh overview of today’s migration processes and therefore it has gained many supporters in academic circles in the USA, Great Britain or Germany (interestingly, the transnational perspective is still nearly absent in the Polish scientific discourse). At the same time for some it has just become a trend gaining more and more popularity with limited explanatory capabilities. The dispute over the transnationalism’s adequacy has determined its development. Therefore we can observe two general phases – the first one relating to excessive interest in transnationalism arising from opposition towards dominant assimilation concept, and the second being focused on the process of proving and strengthening its theoretical significance [Kołbon 2006, p. 203–204]. It is also worth noticing, that the term ‘transnationalism’ may refer to two separate phenomena. The first one (transnationalism from above) relates to activities conducted by representatives of governmental structures, groups of countries or multinational corporations. It is thus close to initial understanding of the term “transnational” that refers to specific character of companies operating in many markets simultaneously. However, what will be the main focus of attention is so called transnationalism from below which pertain only to cross-border activities initiated by single individuals or groups of migrants [Kindler 2008, p. 51].

Clear overview of the presented problem was given by L. Basch, N. Glick Schiller and C. Blanc-Szanton. They related transnationalism to processes of creating and sustaining by migrating individuals multiple social, cultural, political and economic (and of a different nature) relations that link both sending and receiving societies: “We define transnationalism as the processes by which immigrants forge and sustain multi-stranded social relations that link together their societies of origin and settlement. We call these processes transnationalism to emphasize that many immigrants today build social fields
that cross geographic, cultural, and political borders... An essential element is the multiplicity of involvements that transmigrants sustain in both home and host societies” [Basch et al., 2003, p. 7].

As a result of transmigration a new model of migrants has been developed, individuals and groups who maintain multiple territorial affiliations as nowadays precisely limited identification with one community or locality is outdated and individuals’ identities do not depend on concrete space but are deterritorialized or territorialized in a different way. Consequently, transmigrants are involved in activities and build their life strategies across national, political, or socio-cultural boundaries. Thus, the transnational nature of migration determines the diversity of flows between countries, resulting from the bonds created by migrants with people and institutions in the country of origin and other co-ethnic members around the world. However, transnational activity does not only relate to those who left their homeland, but also to those who remained in it, as they create transnational ties by maintaining contact with their relatives or friends abroad. Finally, it results in creation of transnational networks between all contacting parties [Van Hear 1998, p. 3; Kindler 2008, pp. 51–52; Trąbka 2009, pp. 74–82].

The network character of transnational linkages is also underlined by other researcher on transmigration – Alejandro Portes. He mentions that as a result of accumulation of migrants’ social networks that cross state borders, there have developed transnational communities that are located “neither here nor there”, but in two (or more) places simultaneously [1998, p. 3]. At the same time migrants are engaged in transnational activities across borders at the same time in order to gain primarily economic and social position. However, this requires them to maintain regular and timely ties with both the hosting and the sending societies. As it was noted before, transnational activities can be initiated either by ordinary individuals and whole groups of migrants (transnationalism from below), as well as relatively powerful actors, such as representatives of governmental structures and international corporations (transnationalism from above). These activities are not limited solely to establish and then maintain international economic ties, but also include various cultural, social, political and religious initiatives, which are equally important in creation of international social capital [1999, p. 464]. A. Portes emphasizes that the phenomenon of transnationalism has cumulative character, as, for instance, initially little financial support from migrants to families in the homeland can turn into structured activities that extend to other, non-economic spheres of life [Trąbka 2009, p. 75].

Also a German scholar Thomas Faist refers to this two-dimensional character of contemporary migration processes when he writes about “transnational social spaces”. Individuals that move across borders form a “bridge” between the sending and receiving communities, which is a factor of high importance in their
adaptation processes. Transnational social spaces are characterized by a high density of informal ties and institutional linkages that are part of social networks and organizations in several countries. Informal ties are constituted by various forms of social capital of spatially mobile and immobile people. Its scope relies on mutual trust, group solidarity and self-help between migrants in a situation of uncertainty caused by the migration process. On the other hand, transnational networks are also influenced by the regulations imposed by particular countries (for instance migration and multicultural policies). Transnationality is thus determined by the complex relationships between both governments and social organizations in sending and receiving countries and transnational groups – migrants [Faist 2000, p. 192–193; Faist 2006, p. 3; Kindler 2008, p. 53]. As Thomas Faist remarks: “The reality of transnational social spaces made up of migrants indicates, first, that migration and re-migration may not be definite, irrevocable and irreversible decisions - transnational lives in themselves may become a strategy of survival and betterment. Also, transnational webs include relatively immobile persons and collectives. Second, even those migrants and refugees who have settled for a considerable time outside the original country of origin, frequently entertain strong transnational links. Third, these links can be of a more informal nature, such as intra-household or family ties, or they can be institutionalized, such as political parties entertaining branches in various countries of immigration and emigration” [2006, p. 6]

Contrary to traditional economic understanding of migration, which highlights the movement of financial capital and goods across state borders, in the transnational approach the emphasis is rather put on the essence of social and symbolic ties, and thus on a form of social integration of foreigners. What is of special importance, migration is here so understood as processes and circumstances increasing possibilities of individuals and groups rather than just a result of unfavourable conditions that push people out of homelands [Kindler 2008, p. 53].

3. Consequences of transmigration

Both Alejandro Portes and Thomas Faist refer to factors enhancing the transnational dimension of contemporary migration flows. Firstly, Portes singles out political factors (revolutions, rebellions, persecutions, etc.) that foster sustaining linkages by migrants (or refugees) with community members in their countries of origin. Secondly, transmigration might be reinforced by individual – successfully completed – mobility of community members, who make up relatively stable connections with relatively immobile group in the sending country. Transmigrants often form chains of migration within which migration of one member of the sending community involves more people (for instance family members) emigrate. It is worth mentioning that these migration networks make use of similar mechanisms as transnational corporation. They
benefit from the development of communication and transport technologies as well as differences in economic conditions between countries. Thirdly, the maintenance of transnational ties is determined by the scope of discrimination that is faced by both migrants abroad and their families in the homeland. Consequently, high importance has the degree of migrants’ integration with the host society, including access to its structures and institutions [Portes 1999, pp. 464–465]. On the other hand, as mentioned above, both Nina Glick-Schiller and Thomas Faist stress that receiving and sending countries’ policies (especially migration policies) and their institutional processes also strongly contribute to the development of transnational ties. Faist underlines that the more liberal immigration policy and more tolerant society towards cultural diversity in the receiving country (and thus foreigners are not forced to assimilate), the more opportunities to preserve identity and cross-border ties with the homeland immigrants have. In case of sending countries their policies towards own citizens living abroad (like encouraging migrants to re-invest remittances and gained knowledge in the country of origin) may also empower transnational tendencies [Faist 2006, p. 3–4]. Finally, working in international environment may further foster process of transnationalization. It seems that particularly employees of transnational companies and organizations, whose daily routine is connected with working and commuting between different countries, can easily maintain transnational practices. However, it should be emphasized that not every person traveling from country to country and living there automatically becomes a transmigrant. As Portes argues, transnational communities are “characterized by dense networks across space and by an increasing number of people who lead dual lives. Members are at least bilingual, move easily between different cultures, frequently maintain homes in two countries, and pursue economic, political, and cultural interests that require a simultaneous presence in both” [1998, p. 16]. Consequently, transmigrant is the one who maintains the potential for life in both the sending county and the host country (countries).

It is thus not a situation of incomplete migration, when a migrating individual does not integrate with the host society, or a pendulum migration, when a migrant lives abroad from time to time, usually conducting seasonal work. Transmigrants are equipped with sufficiently high social and cultural capital (and thus rather highly qualified) that allows them to function in different environments, i.e. to maintain numerous and, above all, sustained contacts across the frontiers or even re-construct own identity in relation to more than one nation-state. Furthermore, they are often able to run more than one household and to be “in touch” with the situation in both countries and participate in making decisions about current affairs. For instance, transmigrants might act in favour of changing political situation in the home country or work in cultural institutions/charities aimed at the home country [Portes 1998, p. 16; Trąbka 2009, p. 75]. Their activities across countries’ borders might be also partly determined by the
need to fulfill cultural, social and religious etc. responsibilities arising out of the homeland-shaped habitus.

Next to the above-mentioned socio-cultural and political impacts of transnational migration, it has also considerable economic significance. Most of migrants make their decisions to emigrate for economic reasons. Despite minor changes, the traditional pattern of migration is present – people generally migrate from poor countries to developed ones, while in the opposite direction migrants make transfers of earned money. As mentioned before, transmigrants usually first assist financially their families and invest money in the homecountry and then extend their activities across borders to other non-economic spheres of life. According to Alejandro Portes emergence of transnational communities is therefore inherently linked to the logic of capitalism, i.e. a constant demand for cheap or low-skilled workforce and, on the other hand, infiltration of consumption patterns and popular culture to the peripheral societies of the world [1998, p. 4].

Transnational linkages have thus appreciable economic effect on migrants, their families and communities in homelands, as well as all localities in which they variably dwell [Vertovec 2001, p. 575]. It is worth to mention that remittances that migrants send to their countries of origin are constantly growing. According to the World Bank data, the sum of the international monetary transfers made by migrants through official channels in 1975 amounted to 2.9 billion USD, while in 2010 they are expected to raise up to 440 billion USD. Remittances transferred through unofficial channels may be even 50% higher. The new EU member states are among the biggest beneficiaries of these transfers. For example, according to the World Bank’s estimations in 2010 Polish emigrants transferred to Poland over 9 billion USD. [Mohapatra et al., 2010, p. 1; Trąbka 2009, pp. 76–79]. However, significantly high money transfers may have both positive and negative effect on particular groups and countries. The economies of developing countries became highly reliant upon migrants’ money as they reach amounts comparable to exports, development aid or tourism. For instance, in 2005 the total amount of money transferred by Polish emigrants equalled almost 10% of the whole Polish exports that year. Migrants’ money do not only support families (as they can be used for both current consumption or investment), but may progressively rework gender relations, support education and facilitate local community development through new health clinics, water systems or cultural and sports facilities. On the other hand, remittances may also undermine local labour markets, create new status hierarchies and generate patterns of economic dependence [Portes 1998, pp. 4–5; Vertovec 2001, p. 575].

4. Opposition towards assimilation concepts
As it was mentioned before, transnationalism has raised as an opposition towards theory of assimilation that had predominated studies of migration and
multiculturalism. The latter was criticized as the concept that implies a static vision of societies, which represent constant, separate and easily identifiable dominant or subordinate cultures. Thus it also assumes valuing cultures, which leads to relation of superiority and inferiority of respective cultures. Furthermore, critics emphasized that assimilation is in fact a one-way and irreversible process of migrants’ integration into the host society and therefore it puts migrants in passive role, where a foreigner is only an object (not subject) forced to melt with the dominant culture and its institutions in order to guarantee his/her social advancement [Kolbon 2006, pp. 203–207].

On the contrary, due to emphasis on the phenomena associated with incessant mobility, diversity, ambiguity of identification resulting from postmodernism, the shift in migration and multiculturalism studies is frequently named “a transnational turn”. What is of particular importance, while analyzing identification strategies of migrants, transnationalism takes into account the context of both the host and sending countries. Migrant uses social capital gained and rooted in both places while moving back and forth. He/she is thus not a passive object dependent on institutions of the host society, but an active subject of social life both in the county of origin and the country of the current stay [Kolbon 2006, p. 204].

Furthermore, contrary to preceding approaches that implied maintaining ties with homelands by migrants as a symptom of their social maladjustment or a failure of the receiving country’s integration policies, according to the transnational perspective migrants’ efforts to sustain and even strengthen linkages across borders are perceived as a voluntary and conscious choice. It is an effective strategy of reducing costs related with staying abroad. As a transnational migrant does not aspire to become a full member of the host society, adaptation to the receiving county is not a purpose in itself for them. Transmigrants are rather conscious decision-makers who take a strategy of minimal adaptation or even decide not to adapt at all. Thus migrating individual is not a vulnerable person overwhelmed by foreign country’s structures as there is no structural determinism that forces migrants to adapt to a certain society (to choose one territorial affiliation) and thus one localized identity [Kolbon 2006, p. 208]. As noted by Steven Vertovec, nowadays „the identities of numerous individuals and groups of people are negotiated within social worlds that span more than one place” [2001, p. 573]. Negotiation of identity in relation to more than one nation-state, when a migrant has multiple territorial affiliations also results in individual’s multitude of identification possibilities. Consequently, it can lead towards deterritorialized identity. Furthermore, due to processual character of migration experience, which is not only a one-time event, migrant’s identity is full of inconsistencies and contradictions, what may foster in development of a hybrid identity [Kolbon 2006, p. 212].
5. Critical voices

Despite growing popularity of transnationalism among numerous researchers on migration, ethnicity and multiculturalism, from the beginning the new approach has been arousing controversies. The critiques refer to not enough satisfactory grounded theoretical basis as well as unconvincing empirical proofs of transnationalism.

Firstly, the opponents have been underlining that maintaining various forms of cross-border contacts by migrants with communities and institutions in their places of origin was not a new phenomenon. It had been observed by researchers since at least the turn of XIX and XX centuries when, for example, East European migrants in the USA had been sustaining ties with families and communities in Europe by mail correspondence or remittances [Vertovec 2001, p. 574]. However, Arjun Appadurai replies that the scale and character of transnational ties and flows is qualitatively different from those observed earlier [Trąbka 2009, p. 82]. Therefore, despite existing structural similarity, those two phenomena should not be compared.

Secondly, it seems also that the role of technology advancement in transport and, particularly, telecommunications in creation of transnational patterns is overstated, as it rather accelerated or enhanced transnational processes rather than caused them. On the other hand, Steven Vertovec replies that it is quite easy to find historical confirmation for the newly formulated theory, but it does not disavow the theory itself. Furthermore, thanks to today’s higher technological advancement the links of migrants with their homeland are much more tangible and intense. Transmigrants are also more capable to influence and participate in decision making processes relating to situation in their families or country in general [2001, p. 574; 2004, p. 4].

Thirdly, another accusation refers to lack of precise boundaries separating the new approach from the previous theories of migration. As noted by S. Vertovec, “transnationalism does not represent an altogether new theoretical approach, but one that inherently builds upon a number of preceding ones (including those of the Chicago School of Sociology and the Manchester School of Anthropology). Differences and similarities with prior theories of migration and immigrant experience should be elucidated so that we can realise whether theoretical advances are really being achieved, or whether we are merely pouring old wine into new bottles” [2001, p. 576]. Furthermore, the opponents argue excessive use of transnationalism in reference to today’s migratory flows. The term itself has become over-used to describe too wide range of phenomena (for instance migrant communities, migrants’ families in countries of origin, ethnic diasporas or even travellers and tourists) [Vertovec 2001, p. 576].

Fourthly, it is imputed that the transnationalism is poorly grounded in theoretical and empirical terms in comparison with preceding concepts and policies.
of assimilation, acculturation, cultural pluralism, integration, multiculturalism, etc. [Kindler 2008, pp. 52–53; Kolbon 2006, pp. 201–202]. Alejandro Portes et al. note: “Transnational migration studies form a highly fragmented, emergent field which still lacks both a well-defined theoretical framework and analytical rigour” [Portes et al., 1999, p. 218]. There are also many empirical areas that have not been examined at all or they were examined in limited extent. For instance, processes and patterns conditioning the intergenerational succession and reproduction of transnational ties and practices (in the second generation of immigrants, who were born and raised in host countries) are not sufficiently researched. There is also a need to examine the relationship between states’ structures, the formation of national identity and transnational processes, e.g. in the areas of borderlands, where there may be a multiplicity of national identities [Kindler 2008, pp. 52–53; Vertovec 2001, p. 577].

Furthermore, it seems that some concepts developed within transnational approach are similar to prior described phenomena. For instance, critics underline the notion ‘transnational community’ is just a new term to describe previously know ‘disapora’ that also refers to the world members of one nation dispersed throughout who maintain contacts with each other. However, other scholars, like Nicholas Van Hear, note that ‘transnational community’ is a broader term as it refers both to traditionally understood diasporas as well as neighbouring communities that are not dispersed. Moreover, diaspora is usually a result of forced migration out of the country of origin, whereas transnational movement also refer to voluntary movement between countries [Van Hear 1996, pp. 3–6; Krzyżowski 2009, pp. 21–22].

Critics also argue that as transnational linkages take so many forms in socio-cultural, economic and political arenas, they may be ‘broad’ or ‘narrow and may vary over time, depending on intensity of exchange and communication, we should single out a typology of transnationalisms and the conditions that affect them rather than a single theory of transnationalism that does not involve all described phenomena [Vertovec 2001, p. 574]. Finally, it is underlined that transnationalism does not have to oppose assimilation. Maintaining various ties between two (or more) countries does not only mean the total orientation of an individual towards the homeland, as it can also create new quality in the country of settlement basing on social and human capital that has been gained in both (or more) countries [Kolbon 2006, p. 211].

6. Conclusions
The emergence and growing popularity of the concept of transnationalism has raised many controversies. As presented in the paper the opponents argue it is just a highly emergent and fragmented concept with limited explanatory capabilities in reference to contemporary migration flows and migrants’ activities in a foreign environment. They particularly underline lack of well-
defined theoretical framework, analytical inconsistency and not satisfactory empirical proofs of transnationalism.

However, while some researchers deny its novel and inspiring approach to the study of migration and multiculturalism, it seems the new perspective allows to better understand current conditions and capabilities of migrants’ adaptation in host societies. What is of a particular importance, the transnational approach implies empowerment of migrating individuals. Migrants’ lack of adaptation with the hosting society and, at the same time, constant efforts to maintain ties with homeland is not an indication of their social exclusion or inefficiency of state’s integration policies, but a consequence of migrants’ conscious choice and strategy. Transmigration also increases identification possibilities of individuals and groups. In this context full adaptation to the receiving society is not a purpose in itself for migrants as structural and technological conditions allow them simultaneously to be ‘in touch’ and identify with different locations.

Abstract

The paper focuses on the concept of ‘transnationalism’, which has recently gained high popularity among researchers on migration, ethnicity and multiculturalism. It implies that as a result of increasing migration flows and differentiation of ethnic populations there have developed a new model of migrants who maintain multiple territorial affiliations and thus are involved in activities and build their life strategies across national, political or cultural boundaries.

The article considers what new findings the transnational approach introduce to studies of migration. It also determines the usefulness of transnationalism in studying of migrants’ life strategies. Finally, as the new concept raises many controversies, the article quotes most significant voices opposing new concept.

References


Factors Influencing the Expatriate’s Work

1. Introduction
According to J.H. Dunning, one of the most important tasks faced by international enterprises is the attempt to reconcile the global corporate strategy with different factors (cultural, political, economic, legal) specific to a country or a region where local units operate [Schaffer 2005, p. 59].

Therefore, it seems that the most important corporate resources which are a decisive factor in long-term success in the international arena is the staff of managers-expatriates capable of managing the branch in a country other than that of the person's residence.

Therefore, the goal of this article is to define the factors which determine the expatriate’s work in the country to which they have been sent.

2. Conditions of Operation of International Enterprises
Throughout the world, there are at present about 82,000 corporations having 807,363 branches and employing nearly 77 million employees (Figure 1).

Such a huge number of foreign units is connected with the issues of employing the expatriates. However, the decision about staffing managerial positions in foreign branches depends on the economic situation and worldwide trends in economy which have been influenced by the crisis and the necessity to economise during the last few years.

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1 Expatriate – also expat, is a manager who comes from the country of origin of a headquarter company or from the third country and is ultimately transferred by the headquarters for long or short contracts to foreign branches of the company or he/she travels among different branches of a given corporation: [Przytuła 2009, p. 476].
Figure 1. Amount of corporation and their subsidiaries in the world

Source: UNCTAD World Investment Report 2009, Overview, p. 21

As shown in the chart below, after the record increase in foreign direct investments (FDI—foreign direct investment)\(^2\) in 2000, the next three years were marked by significant decrease in those flows. According to the experts, it was influenced by such factors as [Adamczyk 2009, p. 11]: a slowdown in the economy of the developed countries, decrease in trust in international corporations in connection with the bankruptcy of numerous enterprises and the so-called “creative accounting”. The next growth of the inflow of FDI in the years 2004–2007 occurred due to relatively high economic growth in many parts of the world. Furthermore, such a structure of FDI was influenced by the mergers and takeovers which were the sign of competitive advantage of the biggest entities which were the strongest in economic terms (Figure 2).

Figure 2. FDI flows (millions of dollars)


\(^2\) Foreign direct investments may have one of the following forms: a) brownfield investment – the purchase of shares of a foreign enterprise sufficient to take over the control over it (i.e. within the merger or takeover); b) greenfield investment – building a new production or service facility (branches or local offices), c) forming an enterprise in cooperation with local partners (e.g. joint venture) in: Strategie firm polskich wobec ekspansji inwestorów zagranicznych, ed. M. Gorynia, PWE, Warszawa, 2005 p. 50.
The preliminary data included in *World Investment Report 2009* for 96 countries confirm, in comparison to the year 2008, further decrease in FDI flows which may fell by further 44%. As a result of the financial crisis, 85% of corporations worldwide blamed the crisis for cutbacks or suspension of their investment plans. According to the estimates, the international corporations had lost about 28% of their profits by the end of 2008.

Bearing in mind the presented phenomena, numerous corporations consider whether the managerial positions in their foreign branches should be staffed by an expatriate or a local manager. Table 1 shows the comparison of benefits and losses for corporations arising from the employment of expatriates and local managers in foreign branches (Table 1).

**Table 1.** Advantages and disadvantages of utilizing expats and local managers in foreign subsidiaries

<table>
<thead>
<tr>
<th>Nationality and staffing: a corporate view</th>
<th>advantages</th>
<th>disadvantages</th>
</tr>
</thead>
</table>
| **expatriate**                             | - direct and personal control over subsidiary  
- help to transfer and establish organizational culture in early stages of establishment  
- provide a career ladder for high performing HQ employees | - can be an expensive option  
- risks associated with an expatriate’s failure  
- may create tensions with the host government  
- limited awareness of local culture, legislation and market  
- may result in discontinuity in the host management team, particularly in case of shorter term assignments  
- work permit and other legislative restrictions | |
| **local manager**                          | - knowledge of local culture, legislation and market  
- provides a career path for high performing local employees  
- generally cheaper option than expats  
- ensure continuity in the host management team, as opposed to frequent managerial changes associated with expatriates  
- perceived well by the local government | - more difficult to exercise control: rely on formal procedures and organizational culture  
- reduced career opportunities  
- possible lack of familiarity or network with HQ personnel—may make communication more difficult |
Nationality and staffing: a subsidiary view

<table>
<thead>
<tr>
<th>expatriate</th>
<th>local manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>increased expertise means learning opportunities for local managers</td>
<td>career opportunities for high performing employees</td>
</tr>
<tr>
<td>makes transition to corporation for local managers easier</td>
<td>perceived autonomy for subsidiary operations</td>
</tr>
<tr>
<td>experienced technical expertise for problems which may arise in operation</td>
<td>a lack of technical and managerial competence may lead to poor performance and the demise of a subsidiary</td>
</tr>
<tr>
<td>provides a lead time for local managers to reach the required standard of performance</td>
<td>may result in political conflicts within the subsidiary over key appointments</td>
</tr>
<tr>
<td>a direct and immediate contact with HQ</td>
<td>a lack of career opportunity for local managers</td>
</tr>
<tr>
<td>lack of career opportunity for local managers</td>
<td>resentment due to the possible differences in reward packages between expats and locals</td>
</tr>
<tr>
<td>resentment due to the possible differences in reward packages between expats and locals</td>
<td></td>
</tr>
</tbody>
</table>

Source: W. Harry, D. Collings, Approaches to international staffing w: Global staffing, ed. H. Scullion, p. 25.

According to J. Rymarczyk “It seems that the best of the existing ways of achieving the best development conditions in the long run is the combination of benefits provided by globalisation with the use of competitive advantage offered by individual locations” [Rymarczyk at all, 2009, p. 9].

C. Bartlett and S. Ghosal are of similar opinion – they have noticed that the international corporations will remain in a dynamic balance between globalisation (consisting in global implementation of standard management practices) and location (consisting in adaptation and matching of those practices to local conditions) [Bartlett, Ghosal 1998].

The management practice provides numerous arguments for employing the expats in foreign branches: they fill the competence gap existing on local markets, the expats know the general corporate strategy and ensure that the corporate standards of operation are followed abroad. Furthermore, according to S. Hetrick [2002, p. 335], the role of an expat comes down to exercising direct control (direct involvement in decision-making, selection of local employees and their development) and indirect control (transfer and implementation of values, attitudes and ways of operation valid in parent unit and being the so-called
“cultural medium”). Therefore, one can say that the expats are the “transfer links” between the headquarters of a corporation and its foreign branches, which means that they are important resources for the corporation.

However, to speak about the success of expatriation, it is necessary to examine different factors influencing the work of those managers. Those factors include organisational, non-organisational and personality factors.

3. Organisational, non-organisational and personality factors influencing the expatriate’s work

The organisational factors include the organisational structure of a corporation and the assumed management strategy. For example, the approach based on the decentralisation of management processes creates wider possibilities of employing local managers, while high level of centralisation may be a good environment for the expatriate’s work.

Another organisational factor may be the strategy of corporate development based on greenfield investment or brownfield investment. In the newly formed branch (greenfield investment) in the host country, it is possible to notice the tendency to employ the expatriates, at least during the initial phase of its operation. Furthermore, during the phase of forming a branch in a new country, the headquarters may have some difficulties with attracting local managerial staff that is adequately qualified and reliable. However, as the branch develops, there arises the necessity of it being managed by a local staff which knows subtle and specific conditions of running business activity in a given country.

In branches which become a part of a corporation as a result of merger or takeover (brownfield investment), we usually deal with employing the local staff that is merged into new management structure after the takeover.

The research made by P.M. Rosenzweig i N. Nohria shows an interesting conclusion that the foreign branches formed as a result of greenfield investment reflect the management standards valid in the headquarters of a corporation to a greater degree than the ones which arose from the takeover or merger [Hetrick 2002, p. 338].

Another factor of organisational nature may be the business. A high percent of expats in managerial positions is noticeable in the branches of corporations that run business activity in the scope of banking and financial services, advertisement, computers, electronics and foodstuffs. It may be explained by the fact that the specificity of those businesses requires considerable control over the work standards and the quality of offered services throughout the world; thus, the preference is given rather to expats who are to supervise the uniform management standard promoted by the headquarters [Scullion 2006, p. 34].

While in the retail trade, where the activities of a corporation should be adjusted to local market needs, the experience gained by an expat in Seoul, for example, may be useless in New York.
The size of a corporation measured with the number of employees is also a factor influencing the decision about employing an expat or a local manager. Huge corporations employ more expats in managerial positions in their branches because they have larger human resources. The base of high potentials is of concern here. This is one of the internal forms of recruitment to managerial positions [Przytuła 2007, p. 24] which consists in searching for—within the corporation—candidates with psychological and physical predispositions, knowledge, and skills and abilities necessary to play managerial roles. The groups of those employees are earlier intensively trained and prepared to work in the highest positions in a corporation.

Furthermore, through the transfer of managers to different branches worldwide, big companies implement the personnel development program which enables the personnel to gain the multicultural experience.

The non-organisational factors include but are not limited to: political conditions, education level of a host country, social and cultural factors.

The political factors significantly influence the work of managers who are foreigners. In 2008 in France, there were demonstrations and protests against the policy adopted by China towards Tibet. Their obvious sign was blocking Paris streets which were on the route of the Olympic torch relay. As a consequence of this incident, the branches of French corporations in China became the target of numerous attacks, threats and hostility towards the Frenchmen who were working there.

The education level in a given country is an important factor influencing the decision of a corporation about employing expats or local managers in a host country. High level of managerial education in a given country ensures the staff potential in a branch. In addition, the level of communication between the representatives of different cultures may be a barrier. Even if they speak the same language, the mental categories of such a language and their understanding are different and may cause numerous misunderstandings and discrepancies. Apart from obvious issues connected with the lack of knowledge of the language of the country to which a person is sent and of its mental categories, S.A. Witkowski and I. Bargiela [2006, p. 323] indicate the non-linguistic dimension, i.e. lack of understanding of attitudes, customs, behaviours and expectations of local employees, which hinders mutual understanding and communication.

The cultural factor influences the shaping of a specific profile of a manager and strengthens the behaviour patterns and systems of values in the activities of members of an organisation [Sitko-Lutek 2004, p. 44]. At this point, it is advisable to draw attention to the complexity of influence of different cultures on the expat’s attitudes and activities: national culture of the headquarters of a corporation, national culture of a branch, culture of the expatriate’s country of origin, corporate/organisational culture. It is worth mentioning that the culture of a given society significantly influences the culture of the organisation. The
research done by N. Adler reveal that the employees’ behaviour is much more influenced by the national culture than by the culture of a given corporation [Sułkowski 2002, p. 12]. A. Pocztowski indicates that the cultural factor is extremely significant in the case of selecting the partners of organisational marriage (merger or takeover). The American managers prefer British enterprises due not only to the language-related reasons but first of all to the professional operation. In the case of managers of the French provenance, the preferred partners are the French companies. For German managers, the most wanted partners are German companies. The least wanted partner in mergers and takeovers listed by the said managers are the Japanese companies due to language problems and disparate views [Pocztowski 2004, p. 196].

One of the variables in the analysed area is the dimension of national culture formulated by G. Hofstede – strong uncertainty avoidance. The companies from countries with strong uncertainty avoidance tend to employ expats in their local units. Cultures with strong uncertainty avoidance are characterised by strong need to control and monitor the business activity, and thus the lack of trust in people from outside, not from the inner circle, is visible. The anxiety about employing local managers is therefore justified by culture.

The need for direct control and coordination of the operations of a branch also exists when there are considerable differences and distance between the cultures of a native and host countries. In such a case, the managers from the headquarters do not trust in the information received from the local staff and justify it with low attachment and loyalty of the local staff to the corporation. Therefore, it is the next argument for employing managers-expats in local units.

The personality characteristics of a manager who starts working abroad are also important for successful expatriation. Apart from qualifications such as knowledge, experience and skills and abilities, the psychological features of such a manager are important as well. W. Arthur and W. Bennett conducted research among 338 expats and they classified five categories of the most important personality predispositions which are a decisive factor in an expat’s work success: knowledge of the scope of management, understanding work and motivation; flexibility/ability to adapt (tolerance of uncertainty, ability to listen to, resistance to stress); being open to other cultures; family situation (the willingness of a spouse to work and live abroad, stable family situation). According to the authors, the family factor and ability to adapt to different conditions were defined by the respondents as the most important and significant for successful work abroad [Bonache, Fernandez 1999].

P. Caliuri studied how the components of personality in Big Five model influence the expatriate’s success. It turned out that extroversion, tendency to compromise and emotional stability are negatively co-related to the failure of expatriation and earlier termination of a contract. It means that the persons with such personality traits will rather succeed in work abroad [Cogin, Fish 2009].
The literature provides for two types of expatriate manager adjustment: personal and socio-cultural. The expat’s personal adjustment refers to the internal psychological sphere and such variables as mental condition, striving for achievements and satisfaction from personal achievements. The socio-cultural adjustment refers to the external psychological sphere which links a person to the new environment, concerns the ability to cope with everyday problems and to establish relationships in the place of work in the host country [da Silva 2008].

The table below shows the set of qualifications (psychological features, knowledge, skills and abilities) which are the most wanted features of managers-expats and have been the most often indicated in the literature on the subject (Table 2).

Table 2. The most demanding qualification of expatriate manager

<table>
<thead>
<tr>
<th>Psychological features</th>
<th>Knowledge</th>
<th>Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>• socialability</td>
<td>• good command of foreign languages</td>
<td>• being a cosmopolitan</td>
</tr>
<tr>
<td>• extraversion</td>
<td>• life long learning motivation</td>
<td>• holistic/strategic thinking</td>
</tr>
<tr>
<td>• emotional stability</td>
<td>• knowledge of HRM issues</td>
<td>• ability to cultural, social adaptation</td>
</tr>
<tr>
<td>• self confidence</td>
<td>• managerial experience</td>
<td>• being an ambassador of the corporation</td>
</tr>
<tr>
<td>• openness to other cultures (cultural flexibility)</td>
<td>• knowledge of international business specificity</td>
<td>• ability to maintain business relationships</td>
</tr>
<tr>
<td>• resistance to stress</td>
<td>• motivation to achievements</td>
<td></td>
</tr>
<tr>
<td>• motivation to achievements</td>
<td>• optimism</td>
<td></td>
</tr>
<tr>
<td>• optimism</td>
<td>• empathy</td>
<td></td>
</tr>
<tr>
<td>• empathy</td>
<td>• amicability</td>
<td></td>
</tr>
<tr>
<td>• amicability</td>
<td>• intelligence</td>
<td></td>
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<tr>
<td>• intelligence</td>
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</tbody>
</table>


The psychological features listed in Table 2 are the most often defined and they are mentioned by numerous researchers, which means that the successful work abroad is determined by the manager’s personality profile. One can say that the prevailing importance is given to the psychological features because they cannot be acquired or learned. This stability of psychological predispositions is the basis of one of numerous definitions of personality describing it as “a set of relatively stable psychological features or predispositions of an individual which make them different from other individuals and at the same time the central system of regulation and integration of behaviour, a product of individual development of a human being” (Encyklopedia Organizacji i Zarządzania 1981). The psychological and physical predispositions are in harmony with situational factors and influence the level of expat’s adjustment to the different culture of a country where they are sent to work.
4. Conclusion
The development of international enterprises and their foreign branches requires a well-prepared managerial staff which is able to work in countries with different culture. The success of such a staff depends on its level of preparation which should take into account numerous factors of organisational nature (size of a company, business, adopted strategy (approach) to branch management), non-organisational nature (political situation of a country of assignment, social and cultural conditions), as well as related to the personality.

It seems that the aspect of individual (personality) determinants of an expat is a key problem which should be taken into account when searching an appropriate candidate for work abroad. Numerous cases of failure of expatriation result first of all from the expat’s inability to adjust to work in a branch and are connected with family problems (impossibility of finding the work by a spouse, separation from the nearest and dearest, problems with adaptation of children in a new country).

Abstract
The success of expatriation is conditioned by numerous merging factors which merge: cultural factors, manager’s personality factors (psychological features) which might predestine or disparage the person for work in the international environment. Moreover, organizational, political and economy factors are of a great importance in the context of expatriation. The influence of these factors may determine the success or failure of foreign assignments, that’s why they are worth presenting.

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1. Introduction

As globalization continues, firms are required to manage an increasingly diverse workforce, with expatriation being just a subset of this challenge. In consequence, international assignments have been popularly used as means by which information sharing, knowledge transfers and organisational routines transmission can be undertaken. According to Black and Gregersen, 80 percent of midsize and large companies send their employees abroad, and nearly half of them plan to increase the number of international assignees [1999, pp. 52–62].

Nevertheless, starting since the 90’s of the previous century, expatriation attractiveness has been (from the workers’ point of view) becoming ever weaker, which, in turn, is the reason why the critical issue for many international organisations is the accessibility of competent candidates interested in undertaking an international assignment [Dowling, Welch, Schuler 1999, p.94, Torbiörn 1982, p. 51]. At the same time, the scale of international assignment failure still remains significant: it reaches 25– 40% of the total expatriation level in developed countries and about 70% in developing countries [Andreason 2003, p. 548]. Moreover, almost 1/3 of delegated managers perform below their superiors’ expectations [Black, Gregersen 1999, pp. 52–62]. Among the most common reasons for expatriation failure is expatriates’ or their companions’ inability to adjust in a host country [Międzynarodowe zarządzanie... 2002, p. 147]. It is worth noticing, however, that this family context is becoming ever more complex and multidimensional in the face of such phenomena as: the increased

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1 Data on expatriation failure refer exclusively to premature returns from international assignments.
use of alternatives for traditional expatriation (e.g. short-time assignments), changes in career patterns (“nomadicity”), growing professional activity of women and the related career duality. In view of the above-mentioned trends and the constantly increasing expatriation scale, there is a need to systematise and update the knowledge on the adjustment of spouses or partners accompanying expatriates and to identify HR policies and practices supporting the process. This need simultaneously constitutes the main purpose of this paper and reaching its aim requires determining the following:

- What does expatriates’ and their accompanying partners’ adjustment consist in? How are those two processes linked?
- What are the main factors facilitating/impeding the partners’ adjustment? What is the role of dual careers here? What is the importance of the partners’ adjustment in the context of changes in expatriation practices?
- What are the indispensable HRM actions increasing expatriation’s chances for success by means of supporting partner’s/spouse’s adjustment process?

2. The role of a partner/spouse in an expatriate’s adjustment

Similarly to adaptation or acculturation, adjustment is a term frequently used with reference to the process of changes experienced by an individual and to its outcomes emerging as a result of moving to a foreign country. However, as suggested by Halsberger and Brewster, the above-mentioned practice has not been fully justified, as acculturation implies comprehensive adjustment to another culture which, in case of delegated workers, does not, in fact, take place or is highly improbable. On the other hand, however, adjustment leads to relatively smaller changes related to the necessity of facing new situations, while adaptation points to big changes occurring as a result of a serious crisis [Halsberger, Brewster 2007, p. 3]. All the same, the ranges of meaning of the examined terms are rather variable and partially shared and the suggested differences refer mainly to the “range” of change. Taking into consideration the vagueness of the above-mentioned differentiation as well as the meaning given to acculturation notion, only two terms shall be used in this paper synonymously: adjustment and adaptation.

Generally speaking, the examined process, in case of both an expatriate and his companions, comprises two interconnected dimensions: psychological and socio-cultural [see: Searle, Ward 1990, pp. 449–464]. The first dimension refers to the subjective well-being or mental states felt by an individual in a new environment, while the other one is understood as the ability to adjust to

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2 It should be noticed, however, that in her later work devoted to acculturation, Ward suggested a different classification of this issue [2001, pp. 411–447]. Namely, she distinguished three perspectives: affective - emphasizing psychological stress and coping strategies activated by an individual; behavioural - which she also referred to as socio-cultural (concentrating on acquiring social competences); and cognitive - showing a person’s identity dynamics.
interactions in a host country. Such an ability may be assessed on the basis of the difficulty level which a given person experiences when dealing with everyday situations. This approach puts stress on social behaviour and practical social skills [cf. Black, Mendenhall 1991, pp. 225–247]. Some authors suggest that gaining the above-mentioned skills and the changes in social behaviour (socio-cultural adjustment) are “imposed” by the circumstances surrounding a person, while the process of changing attitudes (psychological adjustment) is not necessary to function successfully in a new environment; it, as it were, occurs as a result of the involved person’s willingness [cf. Jun, Lee, Gentry 1997, pp. 519–535, Furnham, Bochner 1986 after: Selmer 2000, p. 7]. On the other hand, however, one may expect that the new environment evokes strong mental discomfort constituting an indication of our psychological maladjustment [cf. Black et al. 1991, pp. 291–317] which might influence other spheres of adaptation process and, in effect, contribute to expatriation failure. As psychological and socio-cultural adjustment dimensions complement each other and their meanings for the success of expatriation must not be questioned, the paper shortly describes both of them.

The socio-cultural issues are, next to the professional sphere, taken into account in the three-dimensional concept of cross-cultural adjustment suggested by Black, Mendenhall and Oddou [1991, pp. 291–317]. It introduces the following domains³:

- work adjustment connected with new work requirements,
- interaction adjustment related to interactions with the representatives of the host country,
- general adjustment connected with the host country’s culture and living conditions.

Two sets of factors determining this multidimensional adjustment process have been distinguished in the examined model: anticipatory and post-departure. The first group encompasses, among others, the range and relevance of preparatory trainings, previous international experience and its similarity to the undertaken international assignment, the adequacy of the management’s expectations and the presence of effective candidate selection mechanisms. The second category, in the version expanded by Shaffer, Harrison and Gilley, comprises: job factors, organisational factor, indicators of job status (positional factors), non-work factors and individual factors [1999, pp. 557–581].

³ The above-mentioned distinction is, according to some researchers, an effect of drawing conclusions on the basis of empirical studies rather than a model based on a theoretical though [Hippler 2000, pp. 491–504; Stahl, Caligiuri 2005, pp. 603–615; Thomas, Lazarova 2006, pp. 247–264].
Table 1. Factors influencing 3 dimensions of expatriate adjustment

<table>
<thead>
<tr>
<th>Factors</th>
<th>General Adjustment</th>
<th>Interaction Adjustment</th>
<th>Work Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Individual factors:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- personality-related</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Cultural flexibility</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>• Social orientation</td>
<td>+</td>
<td>+</td>
<td>+</td>
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<tr>
<td>• Willingness to communicate</td>
<td>+</td>
<td>+</td>
<td>+</td>
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<tr>
<td>• Conflict resolution orientation</td>
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</tr>
<tr>
<td>• Extraversion</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Motivation to go overseas</td>
<td>+</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>• Ability to work with multinational workforce</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>- experience-related</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Communication and language skills</td>
<td></td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>• Previous assignments</td>
<td>+ / -</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>• Previous knowledge of the host country</td>
<td>+</td>
<td>+</td>
<td></td>
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<tr>
<td>• Time spent with host nationals</td>
<td>+</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>• Time spent with other expatriates</td>
<td>-</td>
<td></td>
<td>-</td>
</tr>
<tr>
<td>• Interaction with host nationals</td>
<td>+</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>• Culture novelty</td>
<td>+ / -</td>
<td>- / 0</td>
<td>-</td>
</tr>
<tr>
<td><strong>Work-related factors:</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>- prior to leaving</td>
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<td></td>
<td></td>
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<tr>
<td>• Pre-departure training</td>
<td>-</td>
<td></td>
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<tr>
<td>• Cultural training</td>
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<tr>
<td>- after arrival</td>
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<td></td>
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<tr>
<td>• Job role novelty</td>
<td>-</td>
<td></td>
<td>-</td>
</tr>
<tr>
<td>• Job role clarity</td>
<td>+</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>• Job role discretion</td>
<td>+</td>
<td></td>
<td>+</td>
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<tr>
<td>• Job role ambiguity</td>
<td>-</td>
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<tr>
<td>• Job role conflict</td>
<td>-</td>
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</tr>
<tr>
<td>• Job satisfaction</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>• Commitment to the local company</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>• Commitment to the parent company</td>
<td></td>
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<td>+</td>
</tr>
<tr>
<td>• Strong corporate culture</td>
<td>+</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>• Perceived organizational support</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td><strong>Environmental factors:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Spouse adjustment</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>• Spouse overall satisfaction</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>• Family adjustment</td>
<td></td>
<td></td>
<td>+</td>
</tr>
</tbody>
</table>

Source: based on [Puck et al. 2003, pp. 10–16]
Table 1 contains a detailed list of factors accompanied by the information on the correlation type completed by Puck, Holtbrügge and Dölling\(^4\) [2003]. It should be pointed out that in the original model by Black, Mendenhall and Oddou [1991, pp. 291–317] the partner’s/spouse’s/other accompaniers’ adjustment constituted one of the nonwork category’s components. It was only the later studies and empirical research that exhibited its role, treating it as a separate and crucial factor positively influencing all expatriate’s adaptation dimensions (Table 1). For instance, the positive relation between the spouse’s adjustment and the international assignee’s adjustment in each of the three domains was confirmed by the empirical research by Shaffer and Harrison [1998, pp. 87–118], Parker and McEvoy [1993, pp. 355–379], Black [1990, pp. 109–125]. Furthermore, the relation with general adjustment and interaction adjustment was suggested by the results obtained by Shaffer, Harrison and Gilley [1999, pp. 557–581] as well as Black and Gregersen\(^5\) [1991, pp. 497–515]. Nevertheless, it can be assumed that the relations between the spouse’s and the expatriate’s adjustment are more complex: many researchers point to the bi-direction of this relation – the so called crossover effect [Caligiuri et al. 1998, pp. 598–614, Black, Stephens 1989, pp. 529–544, Shaffer, Harrison 1998, pp. 87–118]. Moreover, some authors suggest that the particular adjustment domains interact - which is the so called spillover effect [Takeuchi et al., 2002 (b), pp. 655–666, Black et al. 1991, pp. 291–317].

The psychological perspective of the adjustment process emphasises the emotions felt at the time, such as: anxiety, frustration, homesickness, satisfaction, as well as the problem of stress frequently accompanying international assignments [see: Torbion 1982, Brown 2008, pp.1018–1034]. The empirical research results suggest that the sources of expatriates’ and their spouses’ stress are: the feeling that they spend too little time with each other, missing close friends, isolation and uncertainty about the future after returning to the home country as well as the difficulty in dealing with too many contrary expectations/demands [Brown 2008, p. 1024]. It should be noticed that the presence of children at international assignments makes both expatriates and their partners feel less isolated than it is in case of singles. What is more,

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\(^4\) The symbols +, -, +/-, 0 in Table 1 relate to the type of relation between the factors and level of adjustment on the basis of empirical research described in the subject matter literature. It’s worth noticing that the assessment of the influence of some factors may sometimes be inconclusive, for instance: culture novelty [cf. Shaffer et al., 1999, pp. 557–581; Shaffer, Harrison 1998, pp. 87–118, Parker, McEvoy 1993, pp. 355–379, Takeuchi et al. 2002 (a), pp. 1224–1244]. Another surprising outcome may be the negative relation between pre-departure/cultural training and general as well as interaction adjustment. Perhaps it is a consequence of defectiveness of those undertakings, e.g. inadequate training techniques or the wrong choice of contents or trainers.

\(^5\) The latter research confirmed merely the relation with the general adjustment, amounting to a high 0.80 factor.
married assignees experience relatively lower stress related to the “reduced-self” domain than single assignees.

The dynamic approach to psychological adjustment has been in particular developed by De Cieri et al. [1991, pp. 377–413]. The authors describe the phenomenon as a process starting already before leaving and lasting throughout at least a few weeks after returning from the assignment during which, within separate stages, an individual goes through specific (typical) emotions [De Cieri et al. 1991, p.379]. The psychological adjustment process displays here the following characteristic features: the period of anticipation and fear preceding expatriation, unrealistic positive assessment and emotions typical for the initial phase of the stay – “honey moon”, exceedingly negative emotions, especially longing for home, irritation and frustration occurring in the next period – “party is over” lasting until the turning point which signals that an individual is gradually adjusting to the new environment and verifying his/her opinions or that the adaptation failed and the person is going through a crisis. The fourth phase is “healthy recovery” during which the acceptance of the new lifestyle and adjustment to the altered conditions take place [Harris, Moran 1979 after: De Cieri et al. 1991, pp. 379–380]. Analogically to expatriation, the repatriation process is connected with hopes and fears of returning home, followed by an euphoric “welcome home” phase, accompanied by unrealistic expectations for changes for better, the feeling of loneliness, disappointment and other negative emotions characteristic of the subsequent “what’s next” stage and finally reaching psychic balance or crisis persistence.

The above-mentioned description of psychological adjustment is merely a theoretical approach to the issue which, nevertheless, can serve as a starting point to further considerations and empirical research devoted to the adaptation of an expatriate’s partner [De Cieri et al. 1991, p. 377]. It should be emphasised at this point, however, that the results of some empirical research are by no means consistent with the postulated phases and their accompanying emotions [see: Ward et al. 1998, pp. 277–291, Ward, Rana-Deuba 1999, pp. 291–306; Boski 2009, pp. 523–524, De Cieri et al. 1991, pp. 377–413]. Moreover, the partner’s adaptation is connected with specific problems which are not faced by the expatriate to such an extent. The situation which a partner/spouse is put in influences the person’s socio-cultural adjustment [Shaffer, Harrison 2001, p. 238] as well as their psychological adjustment [De Cieri et al. 1991, p. 400] in a specific way.

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6 The domain described in Brown’s research as “reduced −self” expressed the feeling of underestimation of efforts and lower self-esteem [2008, pp.1027–1028].
3. The specific character of the expatriate’s spouse/partner adjustment

The experiences of a spouse may differ from those of an expatriate to a large extent in terms of their nature and degree [Black, Gregersen 1991, pp. 497–515, Black, Stephens 1989, pp. 529–544]. For instance, a spouse interacts with the local society more frequently, must often give up his/her career and does not have such opportunities to sustain relationships or receive support in the professional sphere as the expatriate who cooperates with the parent firm - usually in more familiar environment, resembling home organization in terms of corporate values and job characteristics. The spouse is more vulnerable to culture shock, as it is the expatriate who often works in the international teams where people widely speak English, whereas the spouse has more frequently to do with people who don’t belong to this cosmopolitan elite [Andreason 2008].

The additional difficulties accompany the spouses’ repatriation - coming back home is, for many of them, connected with the loss of expatriate society’s support, which is especially painful when the “old friends” don’t have enough time and are not interested in deepening/ renewing the bonds after a long separation [see: Torbion 1982, Tremayne 1984, p. 132]. Moreover, due to their career break, competence depreciation and outdated knowledge, it is harder for them to return to the professional activity, which may prolong/deepen the period of the domination of negative assessment, disappointment and frustration. In the face of the above-mentioned differences, as well as on the basis of the empirical research exposing the role of different factors influencing the spouse’s/partner’s adjustment (Table 2), some researchers suggest the necessity of modifying the concept in question. An attention-deserving suggestion comes from Shaffer and Harrison. They propose that, along with general and interaction adjustment, a personal category should be introduced, linked to the sense of “being at home” and depending on the extent to which a spouse can re-establish his/her social identity [after: Bauer, Taylor 2001, p. 136].
Table 2. Factors influencing the adjustment of the expatriate’s spouse/partner

<table>
<thead>
<tr>
<th>Factor</th>
<th>Influence on spouse adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>personal</strong></td>
<td></td>
</tr>
<tr>
<td>change in employment status (from being employed to being unemployed)</td>
<td>negative but not significant correlation</td>
</tr>
<tr>
<td>language fluency</td>
<td>positive influence</td>
</tr>
<tr>
<td>satisfaction with life</td>
<td>positive influence</td>
</tr>
<tr>
<td>satisfaction with family relationships</td>
<td>positive influence</td>
</tr>
<tr>
<td>self-esteem</td>
<td>positive influence</td>
</tr>
<tr>
<td>social support in host country</td>
<td>positive influence</td>
</tr>
<tr>
<td>extended family support</td>
<td>negative influence</td>
</tr>
<tr>
<td>having preschool-age children</td>
<td>positive influence</td>
</tr>
<tr>
<td>social efficacy</td>
<td>negative influence</td>
</tr>
<tr>
<td><strong>organizational</strong></td>
<td></td>
</tr>
<tr>
<td>company assistance</td>
<td>positive influence, strong in early stages</td>
</tr>
<tr>
<td>certainty of assignment duration</td>
<td>no significant correlation</td>
</tr>
<tr>
<td><strong>cultural/environmental</strong></td>
<td></td>
</tr>
<tr>
<td>culture shock</td>
<td>negative influence in early stages</td>
</tr>
<tr>
<td>perceive culture distance</td>
<td>negative influence in early stages</td>
</tr>
<tr>
<td>culture novelty</td>
<td>negative influence</td>
</tr>
<tr>
<td>favourability of living conditions</td>
<td>positive influence</td>
</tr>
</tbody>
</table>


The adjustment process of the partners accompanying expatriates is shaped by various factors (described below) which, by convention, can be divided into three categories: linked to the person, to organisation and to the host country, whereas their meaning will be different than in the expatriates’ case (Table 2).

Research suggests that the aspects facilitating spouse’s adjustment are the ability to communicate in a foreign country and the sense of satisfaction - both general and linked to family relations. A relatively stable feature of self-esteem turned out to be related to the successful adjustment process as well [De Cieri et al., 1991, pp. 377–413].

An essential success factor seems to be the social support gained due to making friends and acquaintances in a host country. The positive influence of having children at pre-school age can be explained in two ways: it either involves the continuation of the specific social role which allows to retain at least part of the identity linked to the host country and/or it involves the opportunity to
build relations with the host country’s inhabitants in a similar family situation, where the interactions in public places, such as parks, playgrounds, etc. are more probable than in case of pupils/students (spending time together not necessarily in the parents’ presence). At this point, a reverse relation, linked to the extended family social support, is worth noticing. Shaffer and Harrison suggest that it may be a result of a spouse’s big effort put in sustaining bonds with the relatives with a simultaneous “negligence” of the relations in the host country [2001, pp. 238–254].

The social self-efficacy of the partner, reflecting self-awareness/being convinced about one’s own ability to develop social relations, despite the authors’ different assumptions, was negatively correlated to the adjustment. Perhaps the outcome points to a cultural conditioning of the feature which brings positive results in the home country but becomes a source of frustration in a different social environment (where an individual fails to establish new relations).

The negative relation between the change of an employment status (from working to unemployed) and the spouse’s adjustment undoubtedly requires confirmation in further empirical research. Such a need can be justified by Shaffer and Harrison’s choice of respondents (wives accompanying traditional - long-term expatriates); besides, such matters (not taken into consideration in their study) as the previous work character, the attitude to one’s own career, the objective reasons for lack of employment (e.g. restrictions in a host country) can be of large importance [2001, pp. 238–254].

Because of limited direct contacts between an organisation and a spouse, one might expect that the influence of organisational factors for his/her adjustment will be much weaker than in case of a worker. However, the research clearly suggests the essential and positive relation between the adaptation and the company’s support, which is clearly visible before leaving homeland and in the initial weeks of staying abroad [De Cieri et al. 1991, pp. 377–413].

The significant role of cultural differences in the partner’s/spouse’s adjustment is fully reflected by the results of the research including the following factors: culture shock, perceived cultural distance and host culture novelty. The research confirmed the suppositions that their high level exerts negative influence on the adaptation success [cf. De Cieri et al., 1991, pp. 377–413, Shaffer, Harrison 2001, pp. 238–254].

Living conditions in the host country were the last factor indicated in Table 2. Their positive assessment (in comparison with the experiences from the home country) clearly fostered spouses’/partners’ adjustment.

Conclusions regarding individual antecedents of the spouses’ adjustment (Table 2) are supported by the empirical research devoted to stressors influencing them during expatriation and repatriation period [cf. Brown 2008, pp. 1018–1024]. Partners accompanying expatriates feel much more stressed than the expatriates themselves due to the lower self-esteem, the feeling of being underestimated and their own incompetence. On the other hand, the need to
receive social support (Table 2) in a place of stay, balancing its partial loss in a home country, was confirmed in the highly stress-inducing role of isolation which is clearly more intensely felt by the spouses separated from their friends and extended family [Brown 2008, p. 1029]. They are afraid of breaking or worsening those close bonds on the one hand [Forster 1997, pp. 414–433]; on the other – building local contact network from the very beginning is for them a source of many tensions. Moreover, everyday difficulties of living in a strange culture were a more intense source of stress (in comparison with expatriates) for the spouses/partners; therefore, the support in dealing with cultural differences on the organisation’s part not only positively influences their adjustment (Table 2) but may also contribute to reducing the level of stress which they experience.

Knowledge about the above-described factors influencing the expatriate’s partners adjustment process may help managers and HR professionals in providing their employers with successful solutions. The special meaning of this process arises from a strong correlation between both spouses’ adjustment and the fact that the reactions of the children accompanying them usually reflect the condition of their parents [Black, Stevens 1989, p. 541]. It should be pointed out, however, that most theoretical considerations and empirical research in this area concentrates on “traditional”, long-term expatriates and their non-working wives. Therefore, the next part of this paper focuses on the ever more crucial issue in expatriation, that is on career duality and its relation to the adjustment of both partners.

4. The present challenges connected with partner’s/spouse’s adjustment and their implications for IHRM

Research conducted at international enterprises by CBI, Employee Relocation Council and ORC in the years 1990–2010 clearly suggests that significant changes take place in expatriates’ society, among others, a growing share of women-managers and the increasing number of the dual-career couples [Cummins 2010, p. 3]. These phenomena create new challenges both for the researchers dealing with expatriation, especially with the problem of adjustment, and for organisations seeking to create appropriate solutions for the changing needs and circumstances of the international operations.

As it has been noticed by Harvey, there is very little empirical research devoted to the adjustment of dual career couples who have been relocated internationally, although circa 70% of delegated managers remain in a relation (marriage or partnership) with an employed person pursuing his/her career [Harvey 1997, p. 627]. Moreover, there is no theoretical model wholly covering the whole issue under examination7. However, for the purpose of this paper, a few observations

7 Nevertheless, the research in the subject matter literature on expatriates’ spouse adjustment (both working and non-working) very often refers to the spillover theory which assumes inability of separating actions, devoted time and stress connected with performed roles in both life domains: professional and family one. This mutual intermingling of the two spheres
resulting from the research carried out by the above-mentioned author among the dual career couples are worth discussing in more detail.

Analysing the issue of the adjustment of expatriates and their professionally active spouses, he came up with the following groups of factors influencing this process: individual (lack of performance during expatriation, marital satisfaction, work/family role pressures, impact on income level, disruption to trailing spouse’s career), position-related (requirements of international assignment, performance appraisal process, host country organizational culture, adequacy of training to fulfil the above-mentioned requirements) and environmental (distance between home and host country in cultural and economic terms, professional contact with external environment) [Harvey 1997, ss. 627–658]. The research results obtained by Harvey allow to formulate the following conclusions [1997, pp.637–650]:

The most crucial factors influencing the adjustment of the professionally active spouses are: organisation support which still does not fulfil the expatriates’ expectations and the distance between the home and the host country. It should be noticed that in the previously described research referring to the antecedents of the spouse’s adjustment (cf. Table 2), support from organization and cultural differences were also of great importance, although predominantly in the initial stages of international assignment. Still, Harvey’s research shows that the important role of the organisational support can be noticed both in expatriation and repatriation.

Among the main conflict/stress domains, family and marital satisfaction were of special meaning; additionally men pointed to the performance below expectations and the lack of adequate preparation for a foreign assignment, whereas women – to the role strain between work and family. There is no doubt that these are the areas which are directly (formulating realistic expectations concerning performance level, providing adequate pre-departure program) and indirectly (supporting/facilitating work-life balance) determined by the organisation. However, the assessment of actions taken by the enterprises was not, in the light of the discussed research, satisfactory. The issue particularly questioned was the usefulness of trainings offered to expatriates and their spouses before leaving; there was also criticism of the employment opportunities for the accommodators and company’s help in compliance with the requirements regarding legal employment of a spouse in a host country. Additionally, female expatriate managers pointed out the need of providing professional consulting for an accompanying spouse. Moreover, according to the respondents, the remuneration and benefit packages which were to compensate the loss of income

involves tension and conflicts, whose consequences (positive and negative) affect both a husband and a wife.

8 332 persons responded to the survey (51% response rate), where: 41% were male-expatriate-repatriate managers, 37% - spouses of male managers, 12% - female expatriate-repatriate managers and 11% - their spouses.
by the trailing spouse were inadequate [Harvey 1997, pp. 627–658]. It should be noticed at this point that worsening of money conditions related to the mission and no opportunity to pursue professional career by one of the spouses may negatively influence the adjustment process (when accompanied by the worsening of the standard of living), general satisfaction, relations between a husband and wife and other spheres of life (in accordance with the spillover and crossover effect theories).

Taking into consideration the hitherto existing observations related to the factors influencing expatriates’ partners/spouses adjustment, as well as the above-mentioned suggestions on the organisation’s involvement in this process, let us have a closer look at the most essential trends in the support offered to those persons.

The ORC research results over the previous 20 years demonstrate substantial diversity of the support methods for the spouses, connected with the expatriation stage [Cummins 2010, p. 4–6]. Currently, the dominating forms of support in the period preceding the assignment are language courses and host country’s culture orientation programmes - both forms advancing in importance. Additionally, some other typical preparatory actions are: assistance in preparing application documents and formalities necessary to obtain a work permit; vocational guidance and job search support. Sponsoring language courses is a dominating form of support during the assignment; less common is covering costs of further education (children), job search support and helping in formalities required before undertaking employment, partial refunds for the spouse’s lost income. The percentage of companies offering expatriates’ spouses cultural trainings during the assignment is about 40%– substantially smaller (by as many as 23%) than in the period preceding the assignment. The repatriation period is usually connected with considerably smaller range of support for the spouse - Cummins points to the gradual decrease of the support level during the last decade [2010, p. 5]. The assistance in preparing application documents and looking for job offers is offered at that time; vocational guidance is offered less frequently.

There is no doubt that there is still a gap between the desired quality and the scope of organisational solutions (policies, programmes, tools etc.), especially within IHRM area and the current practices directly or indirectly influencing the adjustment process of the partners accompanying the expatriates. The range and intensity of organisation’s activity before the assignment has to some extent improved in the previous years, however, cultural trainings are still being criticised [cf. Puck et al. 2008, pp. 2182–2197]. A positive symptom may be the popularity of covering costs of language courses before and during an international assignment as the ability to speak a language positively and substantially influences the adjustment process and facilitates finding employment in case of the accompanying person. Still, during the stay, and especially when coming back to the home country, the company’s support seems to be insufficient.
Table 3. The suggested IHRM practices supporting expatriates and their partners

<table>
<thead>
<tr>
<th>Stage</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-departure</td>
<td>- discussion on international assignment (including: realistic view of everyday work, expectations concerning performance, anticipated date of return), its possible consequences for expatriate and family (in a host country and after returning home), requirements and help needed (recommended presence of a spouse)</td>
</tr>
<tr>
<td></td>
<td>- selection process including family concerns, i.e. personality and attitudes, career orientation, healthy matters, previous experience and other family-related problems (applies to both partners)</td>
</tr>
<tr>
<td></td>
<td>- ensuring enough time and providing help in managing matters such as: partner’s possible career disruption, children’s education, housing, taxation, financial and medical concerns, farewells to friends and extended family</td>
</tr>
<tr>
<td></td>
<td>- providing adequate training on cultural issues*, developing social competences and language skills (applies to both partners)</td>
</tr>
<tr>
<td></td>
<td>- providing basic information on employment opportunities for spouse/partner, assistance in fulfilling host country requirement (visa, work permit etc.)</td>
</tr>
<tr>
<td></td>
<td>- mediating/facilitating/encouraging expatriate and spouse to contact other company expatriates/repatriates and their communities abroad</td>
</tr>
<tr>
<td>After arrival</td>
<td>- providing enhanced information on employment opportunities, assisting in the search for a job, career counselling (for spouse/partner)</td>
</tr>
<tr>
<td></td>
<td>- financial help (compensating the lost income of expatriate’s partner, cost of children’s education)</td>
</tr>
<tr>
<td></td>
<td>- helping in relocation and accommodation, logistic assistance in handling day-to-day living requirement,</td>
</tr>
<tr>
<td></td>
<td>- providing language courses and further cultural training focused on local interactions,</td>
</tr>
<tr>
<td></td>
<td>- mentoring programs, where host-country employees “adopt” trailing spouses and children,</td>
</tr>
<tr>
<td></td>
<td>- supporting work-life balance, developing time management skills, offering psychological counselling, stress monitoring,</td>
</tr>
<tr>
<td></td>
<td>- creating favourable circumstances for building local contacts at clubs/organisations/societies, developing partner’s personal and professional interests,</td>
</tr>
<tr>
<td></td>
<td>- facilitating of sustaining relations with the home country (by providing information, ensuring the possibility to maintain relations by means of electronic devices and covering costs of travelling/stay in the home country), providing realistic information on the changes in the company/home country, the subsequent stages of the career and other consequences of returning home.</td>
</tr>
</tbody>
</table>

* The range, length and form of training should take into account, among others, the following aspects: the length of stay, the distance between the host country and the home country, the intensity and nature of interaction with the local representatives as well as individual features of the assignees [Dowling et al. 2008, pp. 142–143].
<table>
<thead>
<tr>
<th>Stage</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repatriation</td>
<td>- providing enhanced information on employment opportunities, assisting in</td>
</tr>
<tr>
<td></td>
<td>the search for a job, career counselling (all for spouse/partner)</td>
</tr>
<tr>
<td></td>
<td>- assistance in relocation and accommodation</td>
</tr>
<tr>
<td></td>
<td>- offering psychological counselling, stress monitoring (for both partners/</td>
</tr>
<tr>
<td></td>
<td>spouses)</td>
</tr>
<tr>
<td></td>
<td>- appreciating international experience and achievement of a repatriate (car</td>
</tr>
<tr>
<td></td>
<td>eer development, changes in remuneration etc.)</td>
</tr>
</tbody>
</table>

Source: own study on the basis of the subject matter literature.

A complex programme of support for expatriates and their companions which would, at the same time, facilitate the process of adjustment to life and work in another country, should contain various solutions taking into consideration the priority needs and expectations of the assignees which change at the successive stages of an international assignment. A general outline of such an offer has been presented in Table 3. The list of recommended practices is, in this case, based on the literature devoted to IHRM as well as the adjustment of spouses accompanying ‘traditional’ expatriates and partners in the so called dual career couples. The suggested solutions require close cooperation of the corporate and local HRM services as well as external consultants, especially during the assignment. In general, it should be underlined that the offer is merely introductory and requires further discussion and empirical verification.

5. Summary

International assignments introduce substantial changes both in professional and family life, especially of those people who are engaged in long-term relationships. Before leaving, each of the partners is involved in a vast network of social relations which constitute a source of support; however, during their stay in a host country they only have a source of support in each other. Expatriation often unsettles the relation balance, sometimes enforces a new distribution of the social roles, especially when the previously employed partner stays at home and no longer pursues his/her career. Returning to the home country, on the other hand, is connected with the unknown and the fear that perhaps some expectations will not be met, it is also related to uncertainty of the changes which might have taken place during their absence there. Top management and HR professionals have to realise that an expatriation often entails a revolution in careers of an employee and his/her partner that affects the whole family. Therefore, in order to make an international assignment successful, it is essential to undertake, at each stage: before, during and after it is completed, appropriate measures addressed not merely to a worker but to the people accompanying him as well, especially a spouse/partner, whose adjustment is undoubtedly of a crucial meaning here.
Abstract

International expansion of any organisation is undoubtedly determined by the availability of motivated, competent and mobile employees, especially the expatriates whose performance is crucial when entering new markets. Research evidence, however, suggests that expatriate failure rates have remained moderately high. The important source of such a problem is delegated employees’ and/or their families’ inability to adjust in a host country. Increasing the importance of expatriates’ spouses/partners adjustment in the context of continuing internationalization and dual-career issues creates new challenges for organizations. Those challenges need to be identified and faced up to by HR professionals. The paper discusses the above-mentioned problem; it aims to identify current developments and focuses on their consequences for international human resource management practice.

References


1. Management in the view of the interactionist theory of professions

The sociological term of profession as it is used here differs from an everyday understanding of profession, in which the routine of experts is normally interpreted as an expression of professionalism. In the Chicago tradition of interactionist sociology (Everett Hughes, Anselm Strauss, and in Germany Fritz Schütze) professional activity is seen as being oriented towards the protection of valuable societal goods. In direct interaction professional work is – at least in principle – oriented towards the client’s well-being [Schütze 1992, p. 135]. At first glance, it seems that such an altruistic action model stands in diametric contrast to the strategic action model of individual utility maximization which is institutionalized in the world of economy. Analysis of biographies of managers and work processes show, however, that although management is not a “real” profession, such as medicine or practicing law, managers do provide profession-like services oriented to the well-being of entrusted personnel. This is the case, for example, when a personnel manager gets involved to help an employee to find a new job in the company while his superior tries to edge him out of the company. Such kinds of social efforts are often constitutive for work and action processes in economic institutions. It is assumed here that economic action is like any other social action (in institutions) bound to basic principles of interaction [cf. Schröder 2010, p. 110 f.; Beckert 1997; Maurer 2008, p. 78 ff.]. Hence, it is also characterized – again as any other type of social action – by cooperative orientations and it is based on idealization practices [cf. Schütz 2003, p. 152 f].
The latter means, for example, that interactants assume that perspectives on a specific subject matter of interaction are shared by each other, although this mutual understanding is not yet an empirical fact and needs to be proven in the course of interaction [cf. Schütze 1996, p. 187 ff.]. In the light of interactionist theory strategic action which would be oriented to one’s own benefit and would not take into account the intention of the interaction partner can be regarded as a very specific type of action. Strategic action bears systematically the risk of generating social escalations due to the violation of cooperation expectations and an endangerment of the base of reciprocity.

Looking at the work of managers from the point of view of professionalization, social foundations and social orientations of managerial action can be focused very well. Talcott Parsons’ structural-functionalism view on professions stressed the importance of academic education of professionals who would bear a particular social responsibility [Parsons 1964]. Therefore, classic professions such as doctors and lawyers are usually in the core of theoretical considerations on professional work. They serve as a model to show that professional activity is characterized by an orientation towards common welfare or, more generally speaking, towards collectivity. The development of a Code of Ethics as a visible expression of the profession’s social responsibility is seen as characteristic, too [Goode 1960]. However, going out this professional-ethical normative view the interactionist-oriented research on professions deals also with professional activities that do not necessarily come out of (full) academic training and cannot draw on a standardized scientific body of knowledge. The interactionist-analytical focus is on specific work processes and interaction situations of professional work. Furthermore, the complex social process of professionalization that unfolds not only on the institutional but also on the biographical level (more on that later) is of core research interest [cf. Schütze 1996].

To this end, life stories told in autobiographical-narrative interviews as well as narrations on work processes between professionals and their clients are analyzed. With such empirical material on work processes it can be scrutinized in what way professional people deal with their clients’ problem, and if the professional person would have a case-analytical understanding. Fritz Schütze, a German sociologist who worked on profession theory, explains: “What the case is, lies – in a first approach – in the constitution of a problem context in the everyday living world of the client” [Schütze 1992, p. 137, translation A.S.]. Case problems stem from increasing difficulties that the affected person encounters when pursuing biographically relevant action plans. These difficulties arise from biographical and other social reasons that can exist for a long time (such as a disposition of a client to circumvent all kinds of conflicts) or that take place only temporarily (e.g. the lack of support from a superior for one of his or her employees who encounters work difficulties). In the unpredictable course of the case’s unfolding the affected person becomes a help-seeking customer of
professional services. For professional help the professional person is asked to take the client’s perspective (in the sense of George Herbert Mead; cf. Mead 1998 [1934], pp. 177–186). Only then he or she will be able to find out constitutive events and conditions that undermine the client’s capacity to act (who is then drawn in a mode of suffering which allows only conditioned reaction). The professional who starts to care of a client, needs to respecify existing theoretical categories that explain (specific) problem developments with regard to the conditions of the respective single case. He or she might even have to develop entirely new explanations. Correspondingly, the study of processes of professionalization means – pointedly said – to understand under what social conditions a professional person develops case-analytical skills and an action orientation towards the welfare of others in his or her biography.

Managerial work, too, is in its structural constitution directed towards other people just as it is the case with professional occupations. This is particular true for the fields of personnel and product development management. The initial idea for studying processes of professionalization of managers in these fields was that economic rationality would not stimulate problem-related ideas for creative work on the development of new products (product development management), and that it would neither sensitize for perceiving and working on problems on the level of the dynamics of social relations in employment relationships (this phenomenon is especially related to tasks in personnel management). Interactional and other non-economic foundations and social dimensions of managerial work can be focused in the aforementioned interactionist theoretical perspective. However, research on management needs also to take into account the phenomenon that the orientation principle of economic rationality, i.e. the adherence to the principle of individual utility maximization, is deeply anchored in managerial work culture. A realistic approach towards managerial action and work therefore needs to realize that objectives and action orientations can form strongly conflicting demands; and this must be theoretically considered as a central structural feature of managerial work. Already the early concept of bounded rationality as well as organizational theory focused on empirical contradictions of the goal-instrumental (zweckrational) model of economic action [e.g. Simon 1959; Cohen/March/Olsen 1972]. Similarly, in industrial sociological research on management inconsistencies between capital logic and organization of work [e.g. Hyman 1987, Deutschmann et. al. 1995] as well as contradictions on the level of tasks and processes and thus antinomies of managerial work – particularly between the logic of utility maximization logic and tasks of social responsibility – were taken into view [e.g. Freimuth 1995; Neuberger 1990, p. 91 ff.; Kalkowski/Mickler 2009]. In the interactionist theory of professions core problems and paradoxes as well as such kind of antinomies are seen as characteristic for professional work [cf. Schütze 1996, p. 187]. They crystallize on the level of interaction and produce systematic potentials for mistakes at
professional work and work difficulties. In the following their specifics will be presented.

2. Paradoxes and antinomies in professional work

The Chicago sociologist Everett Hughes explains that professions claim a mandate for the administration of specific social values in a national society [cf. Hughes 1965, p. 448 ff.]. Linked to the mandate is a license or permission given to the professions to execute their work for the sake of help-seeking clients. The measures taken by the professionals are developed on the basis of an exclusive knowledge which is foreign to laypersons. A core feature of the professional work situation is therefore that professionals provide services in a very difficult interactional situation [Schütze 1996, p. 184 ff.], an asymmetrical professional-client relationship with striking gaps of skills, power and knowledge. A further characteristic is that the professional work is done between the professional and his or her client who do not know each other. At the same time, however, only mutual input of trust can form a trust base for the joint problem solving work that can be very difficult and even painful. And this work needs to be done on a very vague knowledge base. These asymmetries in the interactional professional work situation continually threaten the base of reciprocity. Therefore – and this is a first constitutional level of paradoxes in professional work – ongoing activities that establish and protect the base of reciprocity become necessary [ibid.]. The professional must, in principle, solicit trust for his actions throughout. This is particularly necessary if it is comes to unexpected or painful interventions of the professional; for example, if a lawyer proposes his client an admission of guilt to mitigate the sentence.

In addition, the professional needs to provide further interaction-oriented services with high sensitivity for work paradoxes. Paradoxes also originate from the logical structure of the professional activity itself [cf. Schütze 1996, p. 187]. For example, the professional social worker who wants to help a young man to get in charge of his biographical planning feels he needs to address the client’s autonomy in order to strengthen his client’s capacity to act. At the same time there is the conflicting requirement that the young man, who is quite disoriented at present, needs pedagogical guidance and practical assistance in order to find the courage and orientation to make first independent steps. Such guidelines bear then again the risk of making the young client again dependent or they could even degrade him. Schütze explains that such conflicting requirements that accompany professional conduct would configure to non-abolishable paradoxes in “that they connect and intensify in certain problem constellations so that it comes to thematically structured aggravations of these core difficulties as well as to irritations associated with these.” [Schütze 2000, p. 70; translation A.Sch.-W.] If professionals are not fully aware of these paradoxes, this generates mistake tendencies at work in a systematic way. The fact that the relationship between
the professional and the client and thus the work contract can be destroyed is a fundamental risk. Even more dangerous are case-related mistakes at work which result from a misconception of the case by the professional. For example, the social worker, who wants to help the young man, can be convinced that his client, who should stand on his own feet, should organize his daily life totally on his own. In light of such a position of strict non-interference the young client would probably feel soon overwhelmed and discouraged by everyday tasks and would give up any autonomous activity at all. If, conversely, the social worker would guide his clients in all matters, the young man could neither develop any new capacities to act.

Professional, client-oriented work that is characterized by such kind of paradoxical orientation structures is to find – as already mentioned – also beyond traditional areas of the “proud” or the “modest” professions (such as social work). The focus of interactionist sociology throws light upon the fact that profession-like tasks are also undertaken in other social worlds and in the social world of business respectively. Beyond the idealized, prescriptive (neoclassical) conception of economic activity, managerial action is indeed realized in interactions. In certain management fields interactional situations are of great intensity, and one can find there classic paradoxes of professional action. For example, if a personnel manager deals with a specific work conflict in a decentralized organization. He or she could feel the need, on the one hand, to wait in the face of a conflict and thus supports decentralized problem solving activities; contrary to this, he or she sees the necessity to intervene in order to prevent intensified conflicts which could destroy cooperation for a long time. In addition, the classical paradoxes of professional action in the economic sector are enforced more than in other social worlds by strong antinomies of orientation principles. These orientation principles originate from different institutional provinces of meaning (in the sense of Alfred Schütz): the orientation principle of utility maximization (in the social world of business) and the altruistic orientation principle (which is found, for example, in the world of social work, but also in specific management fields). These antinomies are especially burdensome in the field of personnel management where core tasks such as personnel care and personnel development must be carried out under pressures of rationalization and against the logic of utility maximization. And in the field of product development managers have to promote art-like creativity in a way that is not at all typical for the economy. Managerial action is in both work areas exposed to an extreme antinomian tension. On the one hand, the principle of the economic sphere of meaning demands an orientation towards profit realization as well as towards the corresponding principles of economic rationality, efficiency and predictability. On the other hand, creative ideas cannot be developed step by step in the context of linear-rational action planning. Instead the executive can only try to set up a social milieu framework in which the production of creative ideas...
is more likely than in fully rationalized organizational contexts. This means, however, that the product development manager needs to outsource such an art-like social milieu and to demarcate it against the company's rational planning and its culture. – The antinomic tensions which originate from different worlds of meaning are working fundamentally and strengthen the paradoxes in a narrower sense as well as work problems related to them.

A sequential analysis of case presentations, in which personnel and product development managers describe work processes related to interaction histories between them and their quasi-clients (personnel, co-workers, but also customers in the field of product development management), allows determining emerging social requirements in the flow of events. Furthermore, the managers’ responses to these reactions as well as related achievements of problem-solving or, in turn, of problematic developments can be analyzed. With such a theoretical focus on work processes prudent interventions as well as sub-optimal strategies in case management in the face of paradoxes and tensions of antinomic requirements become visible. – The research on professional tasks of managers and biographical professionalization processes was done with the theory-based methodological body of biography analysis [cf. Schröder 2010 on Schuetze’s methodology, Part B].

In the following I will present a case example of professional managerial work and the emergence of a specific paradox-phenomenon. Based on case comparisons, generalizations with regard to other paradoxes and antinomies will follow. Finally, it will be asked which social conditions in the biographies of managers promote a professional competence that is in its core characterized by an awareness of paradoxes and antinomies in their own actions.

3. A case study from personnel management

Even though managers have significant experiences in their lives that sensitize them for social tasks, social phenomena and foundations in their lives, their awareness for social tasks in their daily work practice can be quite restricted. This is amongst other conditions due to the fact that – as already indicated – the dictate of economic rationality in private corporations is of penetrating power. The rigid enforcement of utility maximization strategies easily superimposes the task of personnel managers to ensure and protect the manifold social conditions of employment relations: e.g. the task of supporting the productive development of employees’ vocational biographies, of protecting employees from the danger of stigmatization and arbitrariness in contexts of organizational upheavals, and of creating possibilities for employees to identify with the company. Hence, the employees’ perspective in conflicts is often merely visible. In the words of the US-American sociologist Harold Garfinkel these conflicts are “seen but unnoticed” which means that the conditions that constitute and dynamize these conflicts are usually not fully understood by managers.
The following case study shows the problem-solving approach of a personnel manager towards a case problem. It shows that professionally acting managers take efforts to carefully consider both, the interests of the corporation and of employees. In the face of redeployment personnel managers are, first of all, confronted with the paradox of the necessity to be geared in their action towards both addressees who demand orientation to conflicting interests at the same time.

Case study

Mrs. Welte is personnel director in the German headquarters of a food company. In the following two text sequences of her narration on a work process with a personnel-client are analyzed with regard to content and the formal narration structure. I intend to show how her attention for the profession-like tasks of her work is clouded at first and then how and why her action orientations alter and become more professional. Structural features of her activities will be spelled out, and it will be shown how they influence the quality and course of interaction.

The personnel manager Mrs. Welte starts her narrative with describing a conflict between an employee of the company and his superior:

And eh anyway in the case of this employee these changes [new business structures – A. Sch.-W.] might came effective at the end of last year. / And the conflict occurred because he [the employee – A. Sch.-W.] was in no way willing to leave any of his former tasks, former strategies and his well-rehearsed routine. / This means / he took the standpoint: I have done this over twenty years. I will continue doing so. / This led to massive conflicts with his superior / of which I’ve learned only in hindsight. [...] So the whole thing is relatively well ehm escalated emotionally. / And uh the whole thing was then not passed on to the personnel department but to the executive board of the department. / true to the maxim: The employee should be out. / We don’t have any use of him. / Then / the former personnel manager became involved in the conflict talks. / But somehow the whole thing came to a point of constant quarreling. / Hence, this man very quickly called in a lawyer because he had the feeling he was being pushed out of his job, and should be forced to take on a new task in X-city. [...] Well so / and the whole thing was at a stage where all ehm were unhappy / the situation was totally hardened. / They would have liked nothing better than to give notice to him. / True to the maxim: He does not do anything at all and / it’s all confrontation. / And he himself would have preferred to remain at his old job and nothing else. [...] Yes, then we have begun to look into - which I mean in a sense that we just started talking / and / well, as a matter of fact it is so / that ehm / mhm / despite of all hardening of the situation, thank God, this employee, because his job was really made redundant / which means it no longer existed in the old form / he accepted to work in X-City for a transition period. [...] [Interview Mrs. Welte, p. 42:27-43:47; highlighted by A. Sch.-W.] First, the personnel manager gets right into the conflict line when taking over the case. The case problem consists in that an employee is threatened to lose his job in the context
of a company’s restructuring process. This employee defends himself against a compensation offer: a job offer in a plant that is several hundred kilometers away from the corporate headquarters. The superior of the employee wants the personnel manager Mrs. Welte to give notice to his co-worker who in the view of the superior would oppose to these unavoidable adjustment measures.

With regard to content, it is striking in the first narrative segment that the personnel manager Mrs. Welte first sees the main reason for the conflict only in an unwillingness of the employee to adapt to organizational changes. While thus taking on the problem definition of the employee’s superior Mrs. Welte also takes on the negative typification of the superior who categorizes his employee as generally reluctant to learn and as being change-resistant. In addition, Mrs. Welte categorizes the case problem as an expression of a recurring problem of her daily work. In her opinion the company’s parties would generally not talk openly enough to each other. This would lead to misunderstandings which could easily escalate. This first case definition, however, which seems to be convincing at first glance, becomes somewhat brittle in the course of the narration. So-called constraints of narration (Zugzwänge des Erzählens) of the autobiographical impromptu story-telling force Mrs. Welte to describe the events of the escalation more accurately. When the personnel manager is about to explain how it came to an initial compromise with the employee concerned, she is forced to tell in more detail what happened before that (Detaillierungszwang). To this end, Mrs. Welte explains in a formally striking “background construction” (Schütze 1984, p. 80 f.)¹ that the position of the employee was fully eliminated with the enforcement of the restructuring program. One learns now that the affected employee was in a situation in which he was threatened to lose his job, if he would not accept the alternative offer which in his point of view was not acceptable. Therefore it appears in a different light that the employee, who was in a threatening existential situation, began to defend himself. In addition, it might have been the case that the employer’s intent to give notice to his co-worker was only veiled by the unattractive job offer which was not acceptable by the employee at all. Against this background, the first categorization of the personnel manager Mrs. Welte with which she labeled the employee as unwilling to learn becomes highly questionable.

In the course of her narration Mrs. Welte then begins to contextualize the case problem with radical changes in the company’s work organization. It becomes clearer that there had not been any negotiations between the company’s

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¹ A background construction is a story told in the background of the main story line (in the interview marked in grey). Often the narrator tries to circumvent difficult events and experiences that are connected to feelings of shame or guilt in his or her story-telling. A background construction becomes necessary at a point in his or her story when the chain of events must be made plausible [cf. Schütze 184, p. 80 ff.].
parties. This condition of escalation was initially not taken into account by Mrs. Welte. For the record, the perspective of the employee does not come up until the self-correction of the personnel manager when she explains that the employee’s position was eliminated. A significant criterion for professional action would be, however, an action awareness of the situation and the interests of the personnel-client, and her commitment to de-escalate the situation. If Mrs. Welte had related the perspective of the affected personnel-client to the perspective of his superior already at the beginning of her case management, she would have clearly seen the pressing dilemma of addressees. And this would have enabled her to deal more consciously with these at least two different relevancies in the interactional conflict situation. She does not do so at first and thus circumvents the perspective of the affected employee. This missing awareness of the paradoxical orientation of considering the interests of the personnel-client in the problem solving process on the one hand, and, on the other hand, of being oriented to an implementation of the company’s restructuring program, is expressed on a symptomatic level in the (above mentioned) small “disorder” in the narration.

Only in the concrete interaction situation, in which Mrs. Welte starts to get personally involved in the conflict and where she begins to communicate with the affected employee, the quality of the social situation alters. The personnel manager Mrs. Welte realizes that if she ignored the employee’s perspective an escalation of the conflict would be systematically promoted. The trust basis for a cooperative settlement of the conflict would be destroyed. Mrs. Welte begins to discuss the problem situation with the employee. She realizes that it is unavoidable for her to orient her work to the conflicting interests of the unlike addressees. The fact that Mrs. Welte does not refrain anymore from the dilemma of addresses in the face-to-face situation, shows that she, in principle, feels morally committed to orient to the interests and welfare of the entrusted employee. She feels a kind of inner commitment to learn about the perspective of the employee in the concrete interaction situation and to take it seriously into account for dealing with the case. The following narrative segment shows that her attitude towards the personnel-client then becomes much more professionalized:

Yes / and then we / had in my point of view a very good private conversation. / I’ve told him what I knew of the case, and also told him that I am now dependent on that he tells me his view of things, so to speak, and that I also want to hear from him what he would see as the core problem and what his topic would be, what his interest is. / He did that. [...] For me, it was very important to find out in our conversation what would be crucial points for him, which we need to take into account in any case, whatever the solution would look like. / And where we might have some space, where he perhaps would be willing to compromise, too, and where he would be willing to move. [...] What / ehm was important for me in our conversation was / to signal to him that I am just not
the servant of anyone or the extended arm of his superiors, but / that I see myself as a neutral person in the whole. / This is an employment / and I am providing services in this company, and my service is to ensure that this employment / is running decently, and to do whatever is necessary to ensure that. / Or that it will end with dignity, if this is the case. / But for my understanding there was no evidence that the [company] would have to do this unidirectional. [Interview Mrs. Welte, p. 44:42–46:48]

When Mrs. Welte takes over responsibility for the case management and takes efforts to understand the perspective of the personnel-client, she realizes that the definition of the problem as it was formulated by the superior provides no basis for negotiations and compromise solutions respectively. Mrs. Welte now finds her professional responsibilities and distances from this first stigmatizing definition of the conflict. Her first step to establish a professional arc of work is exactly this effort to bring about an inter-subjective definition of the situation. To this end, she strives for a systematic triangulation of perspectives and requests the assessment of third parties (e.g. of the work council). This change in the personnel manager’s attitude is expressed in her concern to symbolize her independent position. She shows explicitly her neutrality – and this is a confidence-building measure – towards the affected employee (“... that I am not anyone’s servant, [...] but / that I see myself also as a neutral person in the whole affair.”). In this way the personnel manager can persuade the employee that she is not keeping up a front against him. The employee then, in turn, begins to act in the hope that the behavior of the personnel manager will prove to be authentic. He expects that a solution for the conflict will consider his interests, too. – To conclude here with the analysis of these two sections, it has to be noted that it is not common that a high-ranking personnel manager such as Mrs. Welte becomes personally involved in such a conflict case. However, personnel management is principally in charge when lawyers are getting involved or legal measures have already been taken.

With regard to the content of the case it has to be noted that this single case represents the structural problem how personnel management reacts towards job endangerment and job transfers due to evaluation and restructuring processes in response to economic pressures. Personnel managers can easily fall into the role to be oriented solely towards the action schemata of the business organization. Then, however, the personnel would not experience the management as an authentic reliable or even protecting partner. The fact that Mrs. Welte (and her co-worker in personnel management) does not take legal steps but take efforts to help the employee to find a new job in the corporate headquarters is an expression of her professional value orientation. It is a matter of authentic concern of the personnel manager to support her employee’s search for an alternative job in the company and, to this end, be oriented towards his vocational interests as well as to his private situation. She has a keen sense that
his vocational future in the company depends on that the employee will be freed from the stigma of the unwilling, reluctant employee. With her support, he finally gets the chance to work in a new job in the corporate headquarters. In fact, the employee is somewhat overqualified for his new position. However, he is very much interested in this job, and hence Mrs. Welte makes his employment possible (more on that difficult task later).

The case shows that the professional self-image of the personnel manager becomes an effective action orientation. Being aware of the paradox of the dilemma of addressees the personnel manager does an interaction-sensitive conflict management which is able to stop escalation dynamics. – This dilemma of addressees and other paradoxes of professional managerial work are now outlined in their general characteristics.

4. List of paradoxes

1. Paradox: the dilemma of addressees in personnel management with regard to redeployment

The universal content of the paradox of the dilemma of addressees in professional work [cf. Schütze 2000] becomes virulent for personnel management especially in the situation of redeployment and reduction of jobs. Basically, this dilemma means that, on the one hand, the interests of the company, who is one of the addressees of personnel management, need to be considered. This is because personnel management is under considerable pressure to implement restructuring programs and all types of modifications in the work organization by which work processes are supposed to become more efficient. On the other hand – and this demand emerges in an inharmonious-conflicting way to the previous one – the interest of the entrusted personnel-clients are relevant for personnel managers’ action orientations. The employee who is threatened by redeployment or even dismissal expects to be protected from hardships in such situations of organizational change. This is particular true for personnel in large German concerns, in which workers’ rights are anchored since decades (amongst other institutions by the work council constitution act). The employee hopes that his work situation as well as his private life situation, or – generally said – his personal relevancies will be considered in the management’s decision. Even in tense situations professionalized personnel managers are aware that their work has to be developed in this structural in-between situation. They assume that their personnel-clients rightly expect considerations and compromises even though these were not explicitly laid down in employment agreements, but eventually derive from basic principles of interaction, especially from a basic cooperation orientation of action [cf. Schröder 2010, pp. 110–113 with additional references]. Expectations of cooperation and support also originate from previous personal investments of employees [cf. Homans 1972, Chapter 1.]
If it already came to disappointment – as in the described case – because of non-transparent practices or power games in the company’s hierarchy, the personnel management needs to do trust work in order to maintain or re-establish (individual and collective) working morale. This is at least an important task as long as personnel management (yet) claims a mandate of being “the” reliable partner and socially responsible authority in the company. The latter is of course basically threatened if personnel work under globalization and profit pressures is only interpreted with regard to economic surplus and its strategic function in the company.

Mistake tendencies in personnel management that arise with this paradox originate from defocusing this dilemma of addressees. A harmonistic interpretation – as one can find it in the case of Mrs. Welte when she starts out with the case management – implies, for example, that changes of organizational structures could be successfully implemented already if employees would be willing to adjust and learn. This interpretation fades out all hardships of rationalization measures and endangerment of vocational biographies. The mechanism of fading out leads to a systematic lack of commitment in personnel management: neither support nor protection measures for affected employees will be developed then. To the contrary, a professional attitude is characterized by genuine efforts of personnel managers to consistently keep an eye on the welfare of the personnel-clients at times of organizational change. Professionalized managers are sensitized towards the employees’ existential situations and the employees’ needs for planning stability. Triangulation of perspectives is a key precondition for a differentiated assessment of such situations of change. A prerequisite for this is that a personnel manager remains susceptible for the (emergency) situation of his personnel-clients. He or she feels committed to do everything in his or her power to remedy such situations. This sense of personal commitment to support personnel-clients corresponds to a moral measure of value of the professional personnel manager. For example, questions of fairness that address the topic of social responsibility of the company express such kind of value orientation. This value-oriented stance contributes to the development of an awareness of paradoxes of managers.

2. Paradox: Orientation towards biographical conditions and biographical development potentials of personnel-clients on the one hand vs. orientation towards actual job offerings and concrete work opportunities on the other hand

This paradox is due to the fact that with tasks of staff development and staffing personnel managers need, on the one hand, to take into account development potentials of personnel-clients. They know that if they want motivated and qualified personnel, they have to find out about biographical preconditions of their personnel-clients, i.e. their potentials for change, what would be sense-making sources of their work and what would be difficulties connected with
their work activities. Professionalized personnel managers understand that if work is experienced as alienating, performance goes down and motivation ebbs away. Nonetheless, biographical development potentials that originate from individual biographical experiences are often unnoticed in personnel work (see below: 3. paradox) and are not seen or accepted as legitimate identification and qualification basis for job search. However, new initiatives in vocational biographies in case of dead-end developments and previously overlooked career lines could be supported by searching for biographical development potentials in the face of redeployments.

If personnel managers and other professionals in the personnel department became biographically sensitized, the constraints to restrict staff development to available job positions only will be easier perceptible. Only this awareness makes it possible to search together with personnel-clients for compromise solutions. In the above case Mrs. Welte, the personnel manager, supports the affected employee to get a job in the corporate headquarters for which he is somewhat overqualified, however, he is very interested in this position. The professional attitude of the personnel manager is reflected in her support of the employee’s unusual choice of employment. She abstains from pushing the employee in a position for which he is indeed properly qualified with regard to education, but which is unwanted (with regard to biographical development opportunities). The personnel manager’s action is guided by her assessment of the individual (vocational) biographical situation and the personnel-client’s job interest. At the same time she reflects the risks associated with staffing over-qualified personnel (in this case). However, she follows her intuition based on talks with the employee that the employee has the potential for fulfilling the new job requirements. Insufficient circumspection in the face of this paradox, in turn, would be connected with the idea of personnel managers that offering a job would already be sufficient effort. With it, questions of biographical fit and development would be completely excluded. The economic dimension would then be the only central criterion for staffing.

3. Paradox: focusing documented performances and evaluations of achievements in personnel talks vs. orientation to a fresh approach in the face-to-face encounter with a personnel-client

Another paradox that requires biographical sensitivity becomes virulent with personnel talks for recruitment purposes. A personnel manager may come under pressure from high-ranking managers in the company that demand implementation, adjustment, or even dismissal of certain employees. In talks with the affected personnel-client the personnel manager relies on his or her competence

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2 This paradox as well as a quantitatively oriented attitude would be most probably found in the work of case managers in public job centers, too.
to come to differentiated assessments in terms of competence, learning potentials as well as of risks and defense potentials of his or her personnel-client. Only then is it possible for him or her to assess qualifications for specific tasks and thus to perform responsible personnel development work. Indeed personnel files and performance documentations (including documentation of failures) basically facilitate a differentiated assessment of skills and competencies. However, personnel managers encounter the problem of not being able to look “behind” documented career developments of the respective personnel-clients. This is because the documentation of performances and achievements is predominantly on success and failure and hence on quantitative and prestige aspects of career advancement. In this way a decontextualized picture of career achievements is created and the quality of vocational biographical experiences is usually covered. Experiences that stimulate learning processes and lead to acquire new stocks of knowledge and also experiences that lead to growing risks in one’s vocational biography are easily overlooked then (e.g. an action scheme of flight in the face of overburdening responsibility which is hidden by career advancements). Skills acquired by intense participation in non-economic social worlds or by living and working in new cultural contexts might be defocused. In addition, quasi-ethnographic competencies of understanding the cultural other as well as competencies of dealing with unexpected problems might be underestimated by the personnel manager or personnel specialist. Furthermore, the capacity to develop contextualized views is often connected with the overcoming of incisive biographical experiences of suffering – and this might not be understood either, if there is a strong focus on success stories in personnel talks.

In the face of this paradox a personnel manager needs to find out about his or her personnel-clients’ experiences. If he or she stays receptive to the experience reconstruction and self-assessment of the personnel-client, he or she can learn something new and unexpected from the (vocational) biographical development of the personnel-client. The personnel manager’s ability to distance from documented assessments is therefore the central aspect of a professional handling of the paradox. Concretely, analytical distance shows in that the professionalized personnel manager is oriented to discover biographic-individual identification grounds with the company or to discuss these anew in the interactive situation, even if these are diverging from previous career lines. This is of particular relevance in the case of young managers who are easily sucked up in a promotion pull (Aufstiegssoh) and are to lose control of their career development [cf. Schröder 2010, pp. 260–263].

If a personnel manager is not able to find an independent stance towards the documents, the personnel talk is likely to be no more than a tool confirming personnel data. It might be then that especially “critical points” (e.g. times of unemployment, negative statements in the personnel file, etc.) become overly focused. Another reason for a strong document focus and a reproduction of
seemingly objective assessments of an employee, a manager or a new candidate can be that a personnel manager tries to hide her or his uncertainty of judging. Conversely, it is problematic when the personnel manager completely ignores performance and competency assessments and believes that only self-assessment of the respective personnel-client would be decision-relevant. This is particular true for managers who have a highly critical view of the model of economic rationality and a rationalized working practice in the company and who are likely to take a too naïve-biased outlook. An integrative perspective on the aforementioned spheres of meaning (of economics and of social orientation) is thus of particular importance for circumspect professional managerial action.

Two other paradoxes associated with employment conflicts

To conclude, two other paradoxes of (managerial) personnel work shall be mentioned: With personnel talks the (4.) paradox becomes virulent that – similar to the diagnostic situation in social work where the social worker needs to develop a realistic idea of the case problem – personnel specialists need to put faith in the personnel-clients. Only then the personnel-client would feel encouraged to talk openly about his or her work and career situation and burdening developments in his or her vocational biography. Professionalized approaches in personnel management are based on case-analytical understanding that can be developed only by taking over the perspective of the involved parties. Personnel-clients must therefore be encouraged to talk about their (work) life history. By means of perspective-taking an empirical understanding of the process and its social conditions that determines the case’s Gestalt (shape) can be gained. (e.g. the manager can learn how a conflict began; that an intensified situation was ignored; that a conflict situation escalated until the conflicting parties completely lost their willingness to cooperate; that the conflict was dealt with in an inadequate way with regard to the constituting factors of the case; that there was a growing discouragement of the parties, and so on). One problem for personnel specialists and managers is that personnel-clients often veil own conflict shares in their presentation of case problems in which they are enmeshed. For personnel specialists and managers it might therefore become necessary to question certain points in their presentations. Doing so, conflict conditions that were nourished by the personnel-client’s behavior could be carefully approached, too. In a stance of solidary critique these shares could be addressed and integrated in a joint definition of the problem.

Finally, client-related personnel work is confronted with the (5.) paradox of having to wait in the face of problem developments in the workforce. Finding decentralized solutions would be supported by this stance of non-interference. Doing so, also conflict resolution skills in the affected area can be supported and further developed. On the other hand, personnel management is required to actively intervene when a conflict in labor relations intensifies. This is because the
involved parties may become emotionally burdened thereof, or demoralization processes could develop in the respective teams. Hence, it would be a mistake when a personnel manager (along with other managers in decision-positions) feels that space for decentralized decision-making needs to be restricted in principle. He or she might think that restrictions could prevent ineffective solutions which deviate from the headquarters’ objectives. In turn, an attitude of laissez-faire bears the risk of escalation of problems that at a later date would no longer be controllable. Such problem escalations could deeply affect the experience of collective identity in the company and, in addition, lead to increasing transaction costs, too.

Paradoxes in the field of product development management (R&D management)

In the management of product development departments more paradoxes become virulent. These are partly cognate paradoxes with regard to the task of how vocational biographical learning processes can be supported. However, given the structural difficulties of stimulating creativity in goal-instrumental (zweckrational) structured work contexts, of dealing with anomies of time in innovation work, and of dealing with organizational changes and constant expectations of profit and success, other specific paradoxical demands occur [cf. Schröder 2010, pp. 397–423]:

• Product development managers are, on the one hand, geared to market analysis and prospect of success when assessing emerging as well as ongoing projects. On the other hand, they are oriented towards the principle of an unpredictable unfolding of creativity, which means that they have to deal with the emergence of yet unknown (technical) developments and vague future horizons.

• Also, the paradox of focusing specific requirements of time needs and resources in the project on the one hand, and, on the other hand, of adjusting towards the goal-instrumental structures of demands of the line hierarchy is not abolishable.

• A third paradoxical constellation that product development managers face is connected with the process of creativity. On the one hand, managers need to look for ways to increase the employees’ potentials of contingency by promoting experiences in new territories (such as in fields of application in other social worlds). The unfolding of new product ideas and new development lines can be systematically supported by such excursions. On the other hand, circumspect managers know that previous successful experiences can function as an important link for the activity of exploring new fields. With it, discouragement and disorientation can be limited if nothing new is found for a long time. This paradox is also relevant for understanding difficulties and professional action requirements in other areas of professional supervision of work processes in which new insights are to be developed.
5. Further general aspects of laboring with paradoxes and antinomies in managerial work

The analyzed cases show that paradoxes of interaction-based managerial work are systematically reinforced by antinomic value orientations. Professional action is by definition geared towards the value of the clients’ welfare. However, in the world of business dominates the principle of individual utility maximization as a measure of value for “right” economic action. Creation of awareness of the aforementioned paradoxes is extremely difficult in a sphere where utility maximization is of highest value. Only a reflective distance in management with respect to this (classical) economic value orientation brings out the conflicting altruistic value orientation. Since managerial action in the economic institutional sector is usually appreciated when the principle of individual utility maximization is uphold, managers, who deal in their daily work practice with paradoxes in a circumspect way, might perceive their own action as an expression of violating proper business conduct. This great social problem is of course extremely irritating for managers and undermines their efforts to act professionally.

The question of how social orientation and economic functioning is linked is of central relevance for a professional outlook and capacity to act. Otherwise, economic ratio functions in the field of business enterprises as a super-structuring power. From this it follows that social foundations and social requirements of managerial action as well as paradoxes and antinomies can hardly be recognized, dealt with or even be discussed openly. Hence, another important question is how managers in their vocational biographies can develop a transcending outlook on economic rationality with which an awareness of paradoxes could be promoted.

6. Biographical processes of professionalization in management

At the end of this article, this second area can only be discussed very shortly. To put it in a nutshell: Biographical processes of professionalization of managers are, generally said, connected with the unfolding of creativity of their self-identities [cf. Schröder 2010, Part D]. Pre-vocational or vocational experiences of future managers that make alternative value orientations biographically relevant are a prime condition for mediating and integrating different value spheres. Action Schemata and metamorphosis process structures play a central role in these biographical processes of professionalization.

First to mention is an action scheme of shaping social relations. This you find in the above analyzed case example of the personnel manager Mrs. Welte. A core feature of this action scheme that professional managers can follow is a habitus of an active style of communication. In the case of Mrs. Welte it shows in that the personnel manager finds it important to include the work council as a cooperation partner in the conflict. Further structural features of this action scheme are a thematic focus on relationship structures between
employees as well as between employees and management. Knowledge of social conditions of cooperative social relationships, and, in turn, of conditions of escalation of social conflicts in work relations is gained in the course of this action scheme. Other types of process structures which promote biographical processes of professionalization are: an action scheme of identity work, in which course managers can become aware of endangerments of the employees’ identity developments, both on the individual and collective level. In a process structure of learning in a biographically sensitized way managers can learn about the importance and legitimacy of relating to biographical interests in career decisions and other decision-making situations. Processes of learning in foreign cultural contexts foster quasi-ethnographic competencies of managers by which they become able to realize universal social principles of action and work processes, for example the importance of cooperation action orientations in situations of change in the company. In learning processes that take place in the context of processes of suffering (future) managers can learn that unexpected developments and crisis experiences due to temporary failure are part of complex work processes.

By such learning and metamorphosis processes certain base positions crystallize that enable managers to recognize and consider social foundations of work processes. These base positions reflect an awareness of principles of cooperation, trust, and identity as preconditions of productive individual-biographical as well as collective development in the workforce. They are relevant to action and allow managers to cultivate self-criticism and self-ascertainment. Authenticity of their own actions as well as circumspection and a will to cooperate can be inspected by them.

Conversely, one also finds detrimental biographical processes in managers’ biographies as well as attitudes, social conditions and mentality structures contributing to these. Types of such kind of biographical process structures are processes of suffering that are, however, often covered by impressive career developments. (These processes cannot be discussed here any further.) Finally, it should be noted that quite often one finds schematizing views of managers on economic (work) processes that hinder a development of transcending views and assessments. An example is a binary schema that is based on the idea that economic activity would not belong to the sphere of social action but follows its own, exactly this monologue, goal-rational logic (and that this needs to be this way!). It is obvious that such a view veils any social requirements of economic action as well as paradoxes and antinomies of managerial work.

7. Final remark
Professionalized work of personnel managers in terms of the outlined sociological meaning of profession is paradoxically in great demand in the context of current processes of economic globalization. It seems that professional managerial work that is directed towards the establishment and protection of social foundations
of economic action becomes especially important in the face of irritation and fear caused by continuous restructuring processes and organizational upheavals in business companies. Cases show that managers often misinterpret or even fade out paradoxical requirements of their work in order to avoid conflicts with addressees and also due to very strong antinomic tensions in the economic institutional sector. Hence, problem-solving activities that take into account the perspective of personnel-clients are often subordinated. This means that managers are likely to put up with further escalation of conflicts. Possibilities of joint solutions are then being diminished or even destroyed. – To conclude in terms of Joseph Schumpeter one might even say that the extreme focus on the value of utility maximization and related theories promote a self-destructive process of capitalist enterprises and (parts of) the economic system in the long run. Processes of professionalization in management could retard this powerful overarching process of endangering the social foundations of work and social action in the economy.

References
Parsons, T., 1964. Die akademischen Berufe und die Sozialstruktur [in:] Beiträge zur
The Polish Culture-Social-Economic Features as a Basis to Create Knowledge-Based Organizations’ Culturs

1. Introduction

E. Jacques was probably the first to introduce the term “organizational culture”. He defined organizational culture as a “typical way of thinking and acting, shared, to a larger or smaller extent, by all members of the organization. New members have to learn this way and at least partially accept it, in order to be accepted in the organization” [(Aniszewska 2007, p.13)]. A substantial increase in attention to this phenomenon started in the 80’s. One of the reasons for this is accelerated globalization, which forced many companies to reconsider issues of domestic organizational cultures, so that they could fit solutions in their overseas subsidiaries. It then became evident that the transfer of solutions between countries /cultures is fraught with difficulties. People in different countries have different attitudes, norms, expectations, and values and these may work against the adaptation of new concepts of behavior. Consequently, there is an increase in cross-cultural studies for these differences at a national level and in organizational cultures.

Organizations create their own specific values, norms, standards and understandings, shaping of personal interrelationships, communication patterns, symbols, means to resolve problems, propensity to accept risk, attitudes towards group work, loyalty and cooperation, acceptance of authority, etc. Such forms are shared by members of an organization and taught to new members as correct [e.g., Duncan 1989]. Culture provides members with the sense of organizational identity. Best managers strive to create a culture that
promotes diversity, encourages initiative, allows experimentation, equality, trust, and supports lifelong learning. Questioning status quo is a norm, as is the search for opportunities, even though this exposes to ambiguity, mistakes, and risk taking. Also, an important feature of many contemporary firms is knowledge management – the way of thinking about organizing and sharing an organization’s intellectual and creative resources. It refers to the efforts to systematically find, organize, and make available a company’s intellectual capital and to foster a culture of continuous learning and knowledge sharing so that organizational activities build on what is already known [Daft 2004, p. 297]. “One of the primary characteristics of learning organizations is a strong organizational culture. In addition, the culture of a learning organization encourages change, risk taking, improvement and adaptation. A danger for many successful organizations is that the culture becomes set and the company fails to adapt as the environment changes. When organizations are successful, the values, ideas, and practices that helped attain success become institutionalized. As the environment changes, these values may become detrimental to future performance” [Daft 2004, p. 371].

Even though extensive research has been carried out on organizational culture in the last few decades, there are still several items that remain unclear or cause inconsistencies in drawing conclusions regarding organizational cultures. Sułkowski [Sułkowski 2005, p. 149] considers the following as key problems:
- Lack of equivocal, sharp, and uniformly accepted definition of organizational culture, as well as its components, models and typologies;
- Whether the notion “organizational culture” should be considered per se or as a metaphor;
- Diversity in paradigms and research approaches may be used to explain how organizational cultures evolve;
- Some research on organizational culture suggests that a unifying overview of organizational cultures cannot exist and there can be no explanation of its impact on the performance of organizations.

The objective of this paper is to identify the propensity of the Polish national culture to absorb and adjust to suggestions and requirements of a model of organizational culture in knowledge based organizations. G. Hofstede’s interpretation of culture and organizational culture form the basis for our comparative analysis – i.e., national culture vs the culture of knowledge-based organizations. The Polish culture is interpreted as described by Nasierowski & Mikuła [Nasierowski and Mikuła 1998] in the report that followed Hofstede’s [Hofstede 1982, 1984] methodology – i.e., “Polish respondents score high in Power Distance and Uncertainty Avoidance, average in Individualism, and moderately above average in Masculinity, as compared to Hofstede’s Hermes data-base results”. Similar to the above are results of studies on the Polish
national culture by Sitko-Lutek [Sitko-Lutek 2004, p.154], who claim that high Power Distance, high Uncertainty Avoidance, task orientation and passive attitudes, high Masculinity and status by nomination are characteristic of the Polish society.

The paper is organized into the following sections in order to achieve the above declared objective.

Firstly, the key features of the culture in knowledge-based organizations are outlined, followed by the presentation of characteristic features of the Polish culture from the organizational perspective. Remarks about the context to support knowledge-based firms in Poland are then provided. These items form the platform to describe the results of a comparative analysis of the Polish culture with the culture required in knowledge-based organizations. Discussion of observations leads to the conclusions of our study.

2. Key features of the culture in knowledge-based organizations

“The emergence of a knowledge-based economy is often associated with the growing share of R&D-intensive industries and with the increasing use of advanced knowledge in hitherto “low-technology industries” [OECD 1999, p. 16]. It is also associated with sectors where no-R&D innovations form the key to business success [e.g., Arundel et.al. 2005]. Knowledge-based organizations seek success in knowledge and a vast web of contacts, interrelationships, and cooperation. Their know-how combined with the know-how of their partners is the main source of new values whereby the benefits of these new values are available to all participating stakeholders including; owners, clients, workers, society, as well as the competition through the facilitation of development and coexistence. Such organizations create and sell products/services, whose value exceeds the value of the physical items used to create such a product. Clients are encouraged to use them, and the knowledge items embedded in such products, which are difficult or costly to obtain, are highly specialized or protected. Knowledge-based organizations continually learn and improve methods to manage knowledge. Knowledge management is the dominant ingredient to their success, the basis for functioning, adaptation to changes in environment, innovation, networking, and the development of human capital [Mikuła 2006, pp. 25–39] [Leibold et.al. 2002, p. 19] [Roberts 2004, pp. 48–49] [Morawski 2006, pp. 82–83].

One of the characteristic features of knowledge-based organizations is organizational culture that is conducive to effective knowledge management. Such a culture has to emphasize the intellectual side of behavior and the norms that create its values and attitudes which foster knowledge creation and transfer. Such standards make it possible to operate in the turbulent environment characterized by a high degree of risk and uncertainty. Such organizations emphasize continuous learning, team work, honesty, confidence and loyalty. The
systematic control of organizational culture is one of the key strategic challenges in such companies.

While keeping in mind Hofstede’s dimension of culture one can propose that knowledge-based organizations should have the following features:

- low power distance (PD) – in order to reduce differentiation and inequalities between workers, that are created by hierarchies and the barriers between management and workers;
- low level of uncertainty avoidance (UAV) – in order to accept uncertainty associated with risky ventures and to facilitate innovation;
- low level of individualism (IND) – in order to allow for teamwork and collective learning; though a high level of individualism may provide the “lightening rod” for initiation of organizational culture changes;
- high level of masculinity (MAS)– in order to set ambitious objectives, and emphasize honesty, though there is also a need for openness, trust, ability to compromise that are frequently characteristic of low level of masculinity.

Values of Hofstede’s indices for selected countries are presented in Table 1.

Table 1. Values of Hofstede’s indices for selected countries.

<table>
<thead>
<tr>
<th></th>
<th>Poland</th>
<th>Spain</th>
<th>Canada</th>
<th>Sweden</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>PD</td>
<td>72*/68**</td>
<td>57</td>
<td>39</td>
<td>31</td>
<td>35</td>
</tr>
<tr>
<td>UAV</td>
<td>106*/93**</td>
<td>86</td>
<td>48</td>
<td>29</td>
<td>65</td>
</tr>
<tr>
<td>IND</td>
<td>56*/60**</td>
<td>51</td>
<td>80</td>
<td>71</td>
<td>67</td>
</tr>
<tr>
<td>MAS</td>
<td>62*/64**</td>
<td>42</td>
<td>52</td>
<td>5</td>
<td>66</td>
</tr>
</tbody>
</table>

* Nasierowski and Mikuła (1998), ** Hofstede and Hofstede (2007)

The knowledge-based organizational culture can be examined from the perspective of efficient learning and knowledge creation, accumulation, and diffusion. The values that are essential in such an organization include variety, holistic thinking, teamwork, cooperativeness, trust, efficiency, drive toward excellence [e.g., Mikuła 2007, pp. 158–160].

An important element in operations of knowledge-based (or learning) organizations rests with the issue of exploration vs. exploitation. “The first is the case of mutual learning between members of an organization and an organizational code. The second is the case of learning and competitive advantage in competition for primacy. ... {It is claimed} .. that adaptive processes, by refining exploitation more rapidly than exploration, are likely to become effective in the short run but self-destructing in the long run” [March 1991, p.71]. “Compared to returns from exploitation, returns from exploration are systematically less certain, more remote in time and organizationally more distant from the locus of action and adoption” [March 2001, p. 73]). There is customarily a problem
of balancing exploration and exploitation that is exhibited in the distinction between refinement of an existing technology and invention of a new one. “It is clear that exploration of new alternatives reduces the speed with which skills at existing ones are improved. It is also clear that improvements in competence at existing procedures make experimentation with others less attractive [March 1991, p. 72]. “Two distinctive features of the social context are considered. The first is the mutual learning of an organization and the individuals in it. Organizations store knowledge in their procedures, norms, rules, and forms. They accumulate such knowledge over time, learning from their members. At the same time, individuals in an organization are socialized to organizational beliefs. Such mutual learning has implications for understanding and managing the trade-off between exploration and exploitation in organizations. The second feature of organizational learning considered here is the context of competition for primacy. Organizations often compete with each other under conditions in which relative position matters. The mixed contribution of knowledge to competitive advantage in cases involving competition for primacy creates difficulties for defining and arranging an appropriate balance between exploration and exploitation in an organizational setting [March, 1991, pp. 73–74].

3. Characteristic features of the Polish national culture – organizational perspective
The subject related literature presents a somewhat diversified view regarding the Polish organizational culture. As stated by Mikulowski-Pomorski [Mikułowski-Pomorski 2007, pp. 344–34] this resulted primarily from:
- Fifty years of semi-Communism at the end of XX century have flattened the social structure, whereas an average Pole demonstrates the features of a vocal landlord, and a pragmatic peasant. Consequently, it is observed that Poles frequently change their attitudes from euphoria and self-confidence, to melancholy and depression;
- Many Poles have been living in two contexts, which strongly impact on their attitudes. The first deals with revolutionary times of radical changes. The second is oriented on preservation of traditional values of the society. The first has called for perseverance, determination, hard work, and social solidarity. The second has been evoking egoism, a tendency to start arguments, and clan type attitudes;
- Recent economic and political changes mark differentiation between:
  • old and new generations, which suggests an ease to adapt to new conditions;
  • people who prefer routines of the old system, and these who prefer creativity and to bring new values to reality;
  • these who expect, or even demand social assistance, and those who rely on entrepreneurship and creative solutions.
With the dimension of Power Distance, we explore the extent to which less powerful members of a society accept the unequal distribution of power and rewards as normal features of the society. Generally, Poles exhibit rather high power distance. In this context, one can expect high centralization, emphasis of control, justified and desired inequity, a high degree of subordination, authoritarian management style, a very emotional relationship between supervisors and subordinates, special privileges and symbols of status desired and accepted, change manifested by a change of the management team, corruption regarded as a serious problem and a tendency to hide scandals [(Hofstede and Hofstede 2007) [Nasierowski and Mikula 1998, p. 501]. Similarly, Mikulowski-Pomorski [Mikulowski-Pomorski 2007, pp. 350–351] claims that Poles exhibit a high power distance that is characterized by high subordination to higher-ups, punctuated by a lack of trust, refusal and a passive resistance. Consequently, some managers try to use a participative management style in order to gain support and reduce uncertainty of subordinates.

Power Distance is related to the wealth of the country. Items related to increased wealth, and decreased Power Distance are exhibited in the development of a modern agriculture, high-tech sector, high urbanization and ease of mobility, a well developed education system and a strong middle-class [Hofstede and Hofstede 2007, p. 81)]. Poland exhibits several socio-economic problems and delays when compared to the so-called developed countries and, surprisingly, to those that are developing. One of the items related to power distance deals with intensity of control. Stor [2008, p. 17] claims that intensified control of Polish employees decreases their engagement in productive work. However, in conditions of high power distance, management does not trust employees, which leads to increased control. This, in turn, decreases open communication and pro-innovative attitudes. He also observes that subordinates do not trust management’s conceptual or financial support when solving problems, nor in the area of collecting, processing or dissemination of knowledge [Rutka and Czerska 2005, p.453]. These perceptions are intensified by emotional barriers that exist when subordinates interact with other subordinates [Glińska-Neweś 2007, p. 206].

“Organizations located in individualistic cultures are more successful than organizations located in collective cultures in their propensity to absorb and diffuse imported technology [Kedia & Bhagat, 1988, p. 565]. The results of investigations of individualism do not show unequivocal results. The characteristics of individualism and collectivism are, in the case of Poland, intermixed. This creates a notion of collectivist-individualism. Its specific feature is marked by a desire to realize individualistic objectives by belonging to a group that simplifies such a goal. Other related features include; children are taught to behave in terms of “I” and “we”; individual conflicts are avoided, group conflicts are a norm, informal contacts form the basis for information - along with mass
media [Hofstede and Hofstede 2007, p. 108]). According to Stor [Stor 2008, p. 3], Poles value belonging to a group, but strive to protect their own identity. They will support objectives of the firm, but only for as long as they are consistent with their personal goals. Glińska-Neweś [Glińska-Neweś 2007, p. 203] claims that Polish individualism is manifested by individual goals, activities and by a decreasing loyalty towards the organizations that employ them. Additionally, she marks an average respect to group norms, average impact of groups upon individual behavior and low intensity of informal groups.

As the literature overview indicated “masculine cultures, more driven to compete, are more dynamic and action oriented. To compete successfully in the global economy, one has to learn strategies for successful implementation of imported technologies” [Kedia & Bhagat 1988, pp. 565–566]. As well, masculine cultures are more effective than feminine cultures in absorbing and diffusing imported technology in organizational context” [Kedia & Bhagat 1988, p. 565]. Mikułowski-Pomorski [Mikułowski-Pomorski 2007, p. 352] makes references to research results that evidence a low degree of masculinity in Polish society. However, there are also elements to the contrary, such as strikes in the Gdansk Shipyard and the acceptance of radical and, at times, painful, economic restructuring in the early 1990s. Other results indicate a tendency towards higher masculinity. Examples to support a slight dominance of masculinity in Polish society include:

- The existence of differentiation between female and male roles in the society
- Female responsibility for emotional, and male responsibility for material side of life;
- A stereotype of a tough and ambitious man;
- Emphasis on high earnings;
- Considering homosexuals as a social threat;
- Considering politics as a struggle with an enemy [e.g., Nasierowski and Mikula 1998; Hofstede and Hofstede 2007, pp. 145–173].

Characteristically most investigated managers identify their professional success with higher salary [Kubik 2006, p. 138].

Issues of uncertainty avoidance deal with the extent to which people in a society feel the need to avoid ambiguous situations and the extent to which they try to manage these situations by providing explicit and formal rules and regulations, by rejecting novel ideas, and by accepting the existence of absolute truths and superordinate goals in the context of work organizations. Uncertainty avoidance of Poles is considered to be high. According to Hofstede [Hofstede 2007, pp. 187–217] in such societies high stress, anxiety, and a feeling of permanent threat is a norm, as is:
- Risk aversion and the lack of tolerance;
- Cautious attitude towards new products and technologies;
- A drive towards stability of employment and infrequent attempts to change careers;
- A low level of innovation;
- Abundant legalities and bureaucracy;
- Conservative attitudes; and
- Strong reverence to law and order (paradoxically, rules are frequently not respected).

A high level of uncertainty avoidance poses a hindrance towards a search of optimal organizational solutions. However, it is also asserted that Poles adapt to such conditions. “Uncertainty and changes are interpreted as a threat, yet also as an opportunity. This interpretation is accepted mainly in new organizations whose development relies upon changes. Then motivation factors start to be important – for example motivation bonuses” [Mikułowski-Pomorski, 2007, 353]. In such conditions, attitudes associated with low tolerance (acceptance) are strengthened. This includes discrimination because of sex, sexual orientation, disabilities, ethnic origin, age and organizational or political affiliations. Research by Cewińska and Wojtaszczyk [Cewińska and Wojtaszczyk 2005, 2007] indicates intensification of such pathologies. This may result in violations of personal rights in the work-environment and in unlawful actions. Paradoxically, a search for legal gaps (lack of clarity of law) is regarded as a means to cope with the problem. According to Rutka and Czerska [Rutka and Czerska 2005, p. 542] a culture with little tolerance to uncertainty dominates. Changes are unwillingly accepted and are regarded as a threat --- “people are afraid to ask what is going on and do not have understanding of the needs of the company”. Therefore, there is a tendency to accept routine, formalized procedures [Glińska-Neweś 2007, p. 209].

Based on the above one can make some comparisons. As compared to the ‘old’ European Union countries (EU-15), the Polish culture is most similar to Greek culture (with an exception of individualism). To be noted, Greece has not experienced any spectacular economic success for a long time. Thus, if culture is the dominant factor in economic performance, one should not expect such success in Poland. However, looking at the economic situation in 2009, this is not a correct assumption. So far, Poland is coping with the crisis quite successfully. As far as a comparison to the culture of the ‘new’ EU members, Polish culture is most similar to that of the Czech Republic. It may be expected that their economic successes can, from the viewpoint of culture, be attributed to a lower power distance than that of the Poles, and lower (though still quite high) uncertainty avoidance.
4. Remarks about the context to support knowledge-based firms in Poland

Beyond cultural determinants, there are several items that impact upon the organizational culture of knowledge-based firms. Some are manifested by solutions adopted within Human Resources subsystems of the National Innovation System. As far as Poland is concerned, several facts should be kept in mind [Nasierowski 2009]. Poland is encountering a continuously falling share of graduates in S&T disciplines. This problem has not been properly addressed. There are only a few mentoring initiatives promoting science among children and youth, as well as among the general public. There seems to be, however, a strong focus on improving HR by business sector through training, courses, and internships in universities. However, understanding the business context and needs of university researchers are ignored. The measure - Regional Innovation Strategies (RIS) and Transfer of Knowledge - includes internships for higher education institution graduates and for employees of the R&D sector and scholarships for the best higher education graduates continuing the PhD courses in strategic areas defined by the RIS. This initiative can be regarded as an incentive to attract students into science, engineering and technology education programs [PETCI, 2006, pp. 26–27].

The share of Poland’s population with a tertiary education is 15.6%, which amounts to 71% of the EU-25 average in 2004 [PETCI 2006, p.15]. This is yet another indicator of possible problems with the creation of pro-knowledge-based culture since it is not likely to change overnight. Concurrently, the unemployment rate is high. It is particularly worrying that more than half of the unemployment rate is a result of structural unemployment, which normally occurs when there is a gap between job requirements and the skills or availability of local workers. Despite significant unemployment rates in Poland, there are no measures addressing or identifying how it will overcome this obstacle for innovation [PETCI 2006, p. 13]. Despite these problems, Poland has shown an impressive acceleration of labor productivity, which increased from 4.1% to 7.7% from 2004 to 2005. The improvement is a result of a web of determinants, such as labor quality, the skills mix of the workforce, technological progress and know-how accelerated by the increasing inflow of foreign direct investments (FDI) and sectorial reallocation effects [PETCI 2006, p. 13)]. However, the export boom has been the main engine of economic growth in recent years.

Deficiencies can also be identified in other subsystems of Polish NIS. Low levels of funding in R&D, lack of cooperation between universities, business sector and governmental research institutes and a generally hands-off approach of the Polish government with respect to pro-innovative initiatives are evident. These policies can be the main factor in Poland’s low ranking in innovation [EIS 2006 to 2009] [GII, 2008] and entrepreneurship [WCY 2008]. These assessments indirectly indicate that the climate to foster cultures supportive of knowledge-based firms in Poland is hampered.
As well, we have compiled some statistical data relative to knowledge-based organizations and innovation [WCY, 2008] for selected countries – i.e., Poland; Spain (because of its similar size to Poland) and some innovative leaders, i.e., Germany, Canada and Sweden.

**Table 2. Some statistical data relative to knowledge-based organizations and innovativeness [(WCY, 2008)]**

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP per capita, in PPP, in $US (tab. 1.1.20)</th>
<th>Unemployment rate – percentage of labor force (tab. 1.4.06)</th>
<th>Labor productivity (PPP) – estimates GDP (PPP) per person employed per hour, in $ US (tab. 3.1.04)</th>
<th>Broadband Subscribers – number of subscribers per 1000 inhabitants (TAB. 4.2.11)</th>
<th>Total expenditure on R&amp;D per capita - $US per capita (TAB. 4.3.03)</th>
<th>Development and application of technology --- are hindered by the legal environment to are supported by the legal environment (tab. 4.2.14)</th>
<th>Qualified engineers --- are not available in your market to are available in your labor market (tab. 4.5.18)</th>
<th>Knowledge transfer --- is lacking between companies and universities to is highly developed between companies and universities (tab. 4.5.19)</th>
<th>Total public expenditure on education per capita - $ US per capita (tab. 4.5.02)</th>
<th>University education --- does not meet needs of a competitive economy to meets the needs of a competitive economy (tab. 4.5.12)</th>
<th>Management education --- does not meet the needs of the business community to meets the needs of the business community (tab. 4.5.13)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poland</td>
<td>15,806</td>
<td>9.60</td>
<td>21.19</td>
<td>76.36</td>
<td>49.8</td>
<td>4.73</td>
<td>4.74</td>
<td>4.52</td>
<td>494</td>
<td>5.13</td>
<td>5.48</td>
</tr>
<tr>
<td>Spain</td>
<td>29,028</td>
<td>8.30</td>
<td>35.18</td>
<td>149.65</td>
<td>287.2</td>
<td>5.89</td>
<td>5.36</td>
<td>3.89</td>
<td>1,124</td>
<td>3.60</td>
<td>3.80</td>
</tr>
<tr>
<td>Canada</td>
<td>37,383</td>
<td>6.03</td>
<td>39.33</td>
<td>228.87</td>
<td>767.1</td>
<td>7.62</td>
<td>6.79</td>
<td>6.35</td>
<td>2,373</td>
<td>7.96</td>
<td>7.58</td>
</tr>
<tr>
<td>Sweden</td>
<td>34,703</td>
<td>6.10</td>
<td>39.47</td>
<td>257.47</td>
<td>1,609.4</td>
<td>7.88</td>
<td>6.69</td>
<td>6.31</td>
<td>2,881</td>
<td>6.74</td>
<td>6.86</td>
</tr>
<tr>
<td>Germany</td>
<td>33,175</td>
<td>8.30</td>
<td>39.87</td>
<td>182.11</td>
<td>886.9</td>
<td>6.56</td>
<td>4.85</td>
<td>5.45</td>
<td>1,422</td>
<td>6.25</td>
<td>6.31</td>
</tr>
</tbody>
</table>
Indicators of a context identified by such indicators clearly indicates that indeed rich countries (Canada, Sweden) may not have problems with supporting a climate of knowledge-based organizations. German context seems to have mixed patterns – strong on regulations and numbers, weak on initiatives. Certainly, the Polish and Spanish context do not foster innovation or a pro knowledge-based culture. Characteristically, at the roots in some instances Poland sows seeds for development (pro-science orientation for youngsters and in education) which seems to be wasted (neglected) when it comes to the application or implementation stage.

5. **A comparative analysis of the Polish culture with the culture required in knowledge-based organizations**

In Table 3 below, a synthesis relative to the comparison of norms and values of organizational culture in knowledge-based organizations with characteristics of the Polish culture as determinants in the creation and functioning of such organizations is presented.
Table 3. Knowledge-based organizational culture vs characteristics of the Polish culture that suggest solutions within organizational culture

<table>
<thead>
<tr>
<th>Knowledge-based organizations</th>
<th>Polish organizational culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flat organizational structures</td>
<td>hierarchical organizational structures</td>
</tr>
<tr>
<td>Organic structures</td>
<td>mechanical structures</td>
</tr>
<tr>
<td>De-centralization</td>
<td>centralization</td>
</tr>
<tr>
<td>High degree of autonomy of employees</td>
<td>low degree of autonomy, subordinates rely on supervisors and expect orders and instructions (even though they do not trust supervisors)</td>
</tr>
<tr>
<td>Supervisor as a trainer, coach</td>
<td>supervisor as a decision maker and a judge</td>
</tr>
<tr>
<td>Leadership</td>
<td>management</td>
</tr>
<tr>
<td>Democratic management style</td>
<td>authoritarian management style</td>
</tr>
<tr>
<td>Knowledge as a source of authority</td>
<td>nomination and position in the hierarchy as a source of power</td>
</tr>
<tr>
<td>Actions tailored to the situation</td>
<td>structured, routine type decision making</td>
</tr>
<tr>
<td>Low formalization</td>
<td>high formalization</td>
</tr>
<tr>
<td>Acceptance of uncertainty</td>
<td>uncertainty avoidance</td>
</tr>
<tr>
<td>Acceptance of deviant (different) opinions</td>
<td>different opinions are not tolerated</td>
</tr>
<tr>
<td>Atypical and new conditions as a source of inspiration</td>
<td>atypical situations are a threat</td>
</tr>
<tr>
<td>Flexible work time tailored to needs</td>
<td>strictly enforced work time</td>
</tr>
<tr>
<td>Confidence and reduction of control mechanisms</td>
<td>low level of confidence and excessive control</td>
</tr>
<tr>
<td>Emphasis of high level of education, knowledge and skills</td>
<td>lower level management is relatively less educated</td>
</tr>
<tr>
<td>Knowledge and skills as key criteria for promotion</td>
<td>promotion depends upon being a member of a leading group and connections</td>
</tr>
<tr>
<td>Open channels of communication</td>
<td>information as a source of power that must be controlled</td>
</tr>
<tr>
<td>Problem solving process involves those who are affected by the problem</td>
<td>managers and experts solve the problem</td>
</tr>
<tr>
<td>Cost reduction as a source of resources for investment</td>
<td>cost reduction as a source of increased profit</td>
</tr>
<tr>
<td>“Future exists today”</td>
<td>there is a lot of time to approach future tasks.</td>
</tr>
<tr>
<td>Continuity</td>
<td>linear perceptions of time</td>
</tr>
</tbody>
</table>

(based on Hofstede and Hofstede 2007; Nasierowski and Mikuła 1998).
6. Discussion and Conclusions

It can be concluded that the creation of knowledge-based organizations in Poland will be extremely difficult when keeping in mind characteristics of the Polish culture. There are several contradictions that will create barriers in the process of the development of attitudes oriented on continuous learning and cooperation with institutions in the environment based on confidence and trust, and innovation. Certainly there are means to cope with existing, typical obstacles as evidenced by industrial practices. One such method is the selection process of employees who exhibit attitudes needed in knowledge-based organizations. Another approach can be associated with routine control over whether norms and values of employees comply with knowledge-based philosophy and interventions if these do not comply. This method, however, can be demotivating and abused.

In addition, it is important that organizations create a culture that fosters knowledge management and makes processes involving knowledge more dynamic. Such initiatives should result in conditions where:
- employees feel a sense of belonging, that the organization is loyal to them and reciprocate this loyalty;
- there is an increased ability for employees to learn and use the new knowledge and skills;
- communication barriers are reduced when a standardized “organizational language” is accepted;
- there is a free flow of information;
- there is a continuous process for professional development programs in place for all employees;
- group-work and horizontal patterns of work orientation are in place;
- there is a strong dedication to please internal and external customers, including identification, acceptance, and satisfying their needs;
- there is a high level of motivation for employees to be innovative, accept experiments and learn from mistakes [Mikula, Pietruszka-Ortyl, Potocki 2002, p. 97].

For many organizations, this would call for a radical redefinition of culture, and an acceptance of the key principles of Total Quality Management.

However, Porter [Porter 2006, p. 172] is “fairly optimistic that culture can be changed, because it is not inherent but learned, and culture is derived from what is rewarded in society. Therefore, changing rules will lead to a change in culture. If you live in a society where rent-seeking behavior is rewarded, then you will inevitably see such behavior become widespread [Baumol, 2002]”. Consequently, even though national culture may not be conducive to creating knowledge-based firms in Poland in general, on a firm level, imposition of rules may be the means to overcome this hindrance. This can be evidenced by organizational cultures in several organizations in Poland. Mainly, those that are subsidiaries of foreign based firms.
There is the need to form subsystems within organizations so that they support the knowledge-management approach. Jaspara [Jaspara 2006, pp. 256–257] indicates that the following may be helpful: social gatherings, websites, motivation rules that foster an exchange of knowledge and experience, allocating time to exchange knowledge, strengthening joint values. Romańczuk [Romańczuk 2000, p. 71], claims that employees should understand the benefits of sharing knowledge for themselves and for the organization, and should be rewarded for such attitudes. Further to these lines of reasoning, Wigg [Wigg 1999, pp. 3–37] recommends to aggressively accept goals that are conducive to knowledge management, proactive management reacting to the changing environment and industry, a strong team culture that supports the exchange of ideas, cross-functional execution of business initiatives, effective champions who promote change, the aid to teams to withstand outside distractions, very strong leadership support from the chairman and CEO and a high trust culture for shared learning.

Furthermore, at least following the neoclassical concepts of regional development, decreasing returns, mainly because of congestion, renders investment in knowledge in “core” areas less efficient [Rodriguez-Poze 2001]. Thus, following objectives of the European Union to improve levels of innovation, there is a chance that more resources will be invested in Poland in order to create knowledge-based organizations. This opportunity will materialize only if governments see it as a chance to increase innovation and more actively engage in pro-innovative initiatives. On the business side, as evidenced by economic results, there is a willingness to improve and successfully compete.

7. Acknowledgments:
Financial support to this study was granted by the University of New Brunswick and is gratefully appreciated.

Abstract
Polish national culture is explored from the perspective of its capacity to absorb recommendations and requirements of organizational culture in knowledge-based, learning organizations. The issue is important because more and more Polish firms are starting to operate in the so-called high-tech sectors. It is noticeable that, mainly due to a tradition of using highly centralized mechanistic structures, high Uncertainty Avoidance and high Power Distance, the development of the organizational culture characteristic of knowledge-based companies may be fraught with difficulties. On the other hand, somewhat ambivalent levels of Individualism (a mixture of very high and very low levels) and a comparatively moderate level of Masculinity, may assist in the creation of an organizational culture that fits knowledge-based firms well.
References


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1. Introduction
We live in the increasingly interconnected world. Globalization opens many opportunities for business but it also creates many complex challenges. Understanding and appreciating cultural values, practices and preferences in ways of behavior in different parts of the world is an important challenge.

The increasing connection between countries does not mean that cultural differences are disappearing or diminishing. On the contrary, as Doug Ivester, the former CEO of Coca Cola pointed out: “As economic borders come down, cultural barriers go up, presenting new challenges and opportunities for business” [Javidan, House 2001, p. 291].

To be successful in dealings with people from other cultures managers need knowledge about cultural differences and similarities among the countries. They also need to understand the implications of the differences and the skills required to act and decide appropriately and in a culturally sensitive way. The GLOBE (Global Leadership and Organizational Behavior Effectiveness) research program has been intended and designed to be an important source of assistance to global managers. This cross-cultural research project was conceived by Robert J.House of the Wharton School of the University of Pennsylvania in October 1993. Since then, the GLOBE has evolved into a multiphase research project in which some 170 investigators from over 60 nations, representing all major cultural regions in the world, collaborate to examine the inter-relationships between societal culture, organizational culture and organizational leadership. The initial aim of the GLOBE project was to develop societal and organizational...
measures of culture and leadership attributes that could be used across the culture. The GLOBE research program has gathered data on approximately 18,000 middle managers in 951 organizations and in this sense it is the most comprehensive cross-cultural study of leadership ever undertaken.

2. GLOBE’s standards for measurement: nine cultural dimensions

The first major question posed by the GLOBE researchers was which measurement standards to use so that they could be precise about the similarities and differences among various societal and organizational cultures.

There is no standard definition of culture and no universal set of cultural dimensions. There are potentially many ways in which cultures can differ and also many ways in which they can be analyzed and described. Culture is nowadays widely treated as a multidimensional concept and construct [e.g. Hofstede 1980, 1991; Trompenaars 1993]. In the GLOBE research program culture was defined as “shared motives, values, beliefs, identities, and interpretations or meaning of significant events that result from common experiences of members of collectives and are transmitted across age generation” [House et al. 2004, p. 15].

Cultural dimensions have been an often-used tool of intercultural researchers for decades. The GLOBE framework for assessing culture consisted of nine cultural dimensions which are presented in Table 1 (see next page).

Another significant fact about the GLOBE’s nine cultural dimensions is that each one was conceptualized in two ways: practices or culture “as it is,” and values or culture as “it should be.”

Some of the GLOBE’s most fascinating findings have come to light because the team consistently sought to compare respondents’ values with their practices.

3. Major research questions about leadership

Many definitions of leadership have been proposed in the literature, but despite the differences among them there seems to be some kind of agreement among the authors that leadership is a process, involves influence, occurs within a group context and involves goal attainment [e.g. Robbins 2003, p. 314, Nelson, Quick 2008, p. 183].

In line with this notion, the GLOBE research team defines leadership as “the ability of an individual to influence, motivate and enable others to contribute toward the effectiveness and success of the organization of which they are members” [House et al. 2004, p. 15].

A large number of leadership theories, usually classified into trait theories, behavioral theories and contingency theories exist in the literature [e.g. Robbins, 2003, Nelson, Quick, 2008].
Table 1. Nine cultural dimensions as used in GLOBE research project

<table>
<thead>
<tr>
<th>Cultural dimension</th>
<th>Short definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Uncertainty avoidance</td>
<td>The extent to which members of a society strive to avoid uncertainty by relying on established social norms, rituals and bureaucratic practices</td>
</tr>
<tr>
<td>2 Power distance</td>
<td>The degree to which members of a society expect and agree that power should be stratified and concentrated at the top</td>
</tr>
<tr>
<td>3 Institutional collectivism</td>
<td>The degree to which societal institutional practices encourage and reward collective distribution of resources and collective action</td>
</tr>
<tr>
<td>4 In-group collectivism</td>
<td>The degree to which individuals express pride, loyalty and cohesiveness in their families</td>
</tr>
<tr>
<td>5 Gender egalitarianism</td>
<td>The degree to which a society minimizes gender role differences while promoting gender equality</td>
</tr>
<tr>
<td>6 Assertiveness</td>
<td>The degree to which individuals in societies are assertive, confrontational and aggressive in social relationships</td>
</tr>
<tr>
<td>7 Future orientation</td>
<td>The degree to which individuals in societies engage in future-oriented behaviors such as planning, investing in the future and delaying individual or collective gratification</td>
</tr>
<tr>
<td>8 Performance orientation</td>
<td>The degree to which a society encourages and rewards group members for performance improvement and excellence</td>
</tr>
<tr>
<td>9 Human orientation</td>
<td>The degree to which individuals in societies encourage and reward individuals for being fair, altruistic, friendly, generous, caring and kind to others</td>
</tr>
</tbody>
</table>


The leadership theory on which the GLOBE research is built, the so-called endorsed implicit theory of leadership refers to the belief that culture has an important impact on explaining different leadership attributions and perceptions. A key element of the implicit leadership theory is that leadership is in the eye of the beholder. That is, “a leader” is a term applied by observers (potential followers) to someone whose behavior and characteristics match the observers’ implicit belief-set. The researchers’ main hypothesis was that each organizational or societal culture will be associated with a specific set of beliefs about unacceptable and ineffective leadership as well as beliefs about acceptable and effective leadership. Different cultural groups may have different
conceptions of what leadership in organizations should entail. In some cultures, one might need to take a strong decisive action to be seen as a leader, whereas in other cultures consultation and participative approach may be a prerequisite. And following from such different conceptions, the evaluation and meaning of various leader behaviors and characteristics may also vary strongly across cultures. [Koopman et al. 1999, p. 504].

One of the most important questions posed by the GLOBE research team concerned the extent to which the practices and values associated with leadership are universal (i.e. are similar worldwide), and the extent to which they are specific to just a few societies. To probe this issue, the team began with a large number of possible leader “attributes.” As a result of their findings from the 18,000 respondents worldwide regarding all these attributes, the team was able to identify 21 “primary leadership dimensions” or “first order factors” that in all societal cultures are viewed as, to some extent, contributing to a leader’s effectiveness or lack of effectiveness. Based on the studies of good leadership attributes and behaviors in different cultures the GLOBE research proposed 21 first-order factors, which were later consolidated into six (see table 2) second-order factors or leadership dimensions. These six “culturally endorsed leadership theory dimensions,” or “CLTs,” represent the ultimate result of the team’s statistical grouping of leadership attributes into common dimensions.

As the authors of the research report write: “These dimensions are summary indices of the characteristics, skills, and abilities culturally perceived to contribute to, or inhibit, outstanding leadership. They can be thought of as being somewhat similar to what laypersons refer to as leadership styles...” [House et al. 2004, p. 675]. The six CLTs are:

1. **Charismatic/value-based leadership** (a leader inspires, motivates and expects high performance from others on the basis of firmly held core values)

2. **Team-oriented leadership** (a leader emphasizes effective team building and implementation of a common goal among team members)

3. **Participative leadership** (a leader involves others in making and implementing decisions)

4. **Human-oriented leadership** (a leader is supportive, considerate, compassionate and generous)

5. **Autonomous leadership** (i.e. independent and individualistic)

6. **Self-protective leadership** (a leader focuses on ensuring individual safety and security)
Table 2. The consolidation of first leadership factors into second order leadership dimensions

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Visionary</td>
<td>Collaborative, team orientation</td>
<td>Autocratic (R)</td>
<td>Modest</td>
<td>Autonomous</td>
<td>Self-centered</td>
<td></td>
</tr>
<tr>
<td>Inspirational</td>
<td>Team integrator</td>
<td>Nonparticipative(R)</td>
<td>Humane orientation</td>
<td></td>
<td>Status consciousness</td>
<td></td>
</tr>
<tr>
<td>Self-sacrifice</td>
<td>Diplomatic</td>
<td></td>
<td></td>
<td></td>
<td>Conflict intruder</td>
<td></td>
</tr>
<tr>
<td>Integrity</td>
<td>Malevolent(R)</td>
<td></td>
<td></td>
<td></td>
<td>Face saver</td>
<td></td>
</tr>
<tr>
<td>Decisive</td>
<td>Administratively competent</td>
<td></td>
<td></td>
<td></td>
<td>Procedural</td>
<td></td>
</tr>
<tr>
<td>Performance-oriented</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: R=reverse scored factor  
Source: House et al. 2004, p. 137
4. GLOBE Student project – introduction

The results of the GLOBE project were based on the data collected from middle managers. The results of the research project supported the idea that leadership behavior is influenced by societal cultural norms of shared values. Building on the findings of the GLOBE research, GLOBE Student study focused on future managers and their perception of societal cultural dimensions and preferred leadership styles. Primary source for the theoretical concepts was, therefore, the GLOBE research with some of the GLOBE-based concepts being adapted by the GLOBE Student research group. The adaptation has been based on the fact that the focus group was mostly unemployed (unlike the GLOBE research population of employed managers) so the part of the questionnaire which dealt with organizational culture as a separate group of constructs was left out [Cater, Konecna, Lang 2010].

The main objective of the project was to study and compare leadership expectations and cultural assumptions of students in European countries. The research instrument was built on the GLOBE II Beta version questionnaire for national culture and leadership scales (House et al. 2004). Culture dimensions were measured using scales in section 1 (culture as it is) and respectively, section 3 (culture as it should be). The scales in section 1 ask the students to value “the way our society is” (practices), while scales in section 3 ask the students’ opinion about “the way our society should be”.

Leadership dimensions were measured using the scales in section 2 and 4 (leadership attributes and behaviors). Those scales asked the students to assess if the attributes and behaviors stated in the item inhibit or contribute to outstanding leadership.

All the answers were assessed with a seven point Liker scale (1=strongly agree, 7=strongly disagree, for cultural dimensions and, respectively, 1=this behavior or characteristic greatly inhibits a person from being an outstanding leader, 7=this behavior or characteristic contributes greatly to a person being an outstanding leader). Some items were reverse coded, following the GLOBE culture and leadership scale guidelines and syntax for the GLOBE leadership and culture [internet source 2006].

So far, research population has been defined as business and engineering students, studying in six Central and Eastern European countries: Czech Republic, Germany, Poland, Romania, Slovakia and Slovenia\(^1\). Business and

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\(^1\) GLOBE Student research project was initiated by Rainhart Lang from Chemnitz University of Technology(Germany) in 2008. Following researchers contributed so far to the project: Z. Konecna, P. Skalova University of West Bohemia, Plzn (Czech Republic), A. Catana, D. Catana, Technical University of Cluj-Napoca(Romania), A. Lasakova, A. Remisova, Comenius University Bratislava (Slovakia), D. Pucko, T. Cater, University of Ljublana(Slovenia), R. Krzykala-Schaefer, Poznan School of Banking (Poland). At the present moment further partners from the
engineering students were chosen because an assumption was made that the future generation of middle managers will mostly come from these two fields of study. The goal of researchers was to secure a sample of a least 300 students from each country\(^2\).

The GLOBE Student research in Poland was conducted between March and May 2010 on the pool of 305 respondents. Our respondents were students from Poznan School of Banking (Wyższa Szkoła Bankowa w Poznaniu) and Poznań University of Technology (Politechnika Poznańska)\(^3\).

The structure of the final sample of Polish students is presented in Table 3 on the next page.

5. Brief examination of the Polish students main results in regard to cultural practices and values

The national culture practices (culture „as it is”) in Poland are described by the students as being characterized by:
- High level of power distance (with mean value 5,27)\(^4\)
- A considerably high level of in-group (4,84) and institutional collectivism (4,48) as well as high tendency to behave in a more assertive, conflict-oriented way (4,1)
- Medium tendency of avoiding uncertainty through rules (4,0)
- Lower expression of gender egalitarianism (3,75), human oriented cultural patterns and ways of behavior (3,67) and performance orientation (3,86)
- Lack of future orientation (3,55)

The research results show also preferences of respondents in regard to the way the Polish society should be. The perspective decision makers believe the cultural dimensions should change their hierarchy in comparison with currently perceived practices. The Polish culture should be much more performance-oriented (with mean value 5,84). Students gave also high priority to in-group, family collectivism (5,66) and at the same time human orientation (5,21). Moreover, future orientation (4,69) and gender egalitarianism (4,66) are perceived

\(^2\) Four strata were defined in advance: (1) Undergraduate business students (BA), (2) Graduate business students (MA), (3) Undergraduate engineering students (BA), (4) Graduate engineering students (MA). In each of the four strata the goal was to include a minimum of 75 students from each country.

\(^3\) Acknowledgment: special thanks to Prof. Teresa Łuczka for her invaluable support and efforts to conduct the research at Poznan University of Technology.

\(^4\) The following differentiation of levels of the nine cultural dimensions has been suggested to be used for the comparison:

Medium level-range of mean value of respondents’ answers 3,95–4,05, medium low-level – 3,1–3,9, medium high level – 4,1–4,9, high level – 5,0–5,4, very high level – 5,5 and above.
as the students’ preferred cultural values alongside a considerably high level of uncertainty avoidance with social norms, rules, and procedures (4,7) to alleviate unpredictability of future events. Students also expressed their preferences in regard to power distance and assertiveness. The Polish culture should be very low power distance culture (2,76) and medium low assertive culture (3,2).

Table 3. The structure of the final Polish sample according to chosen students’ characteristic

<table>
<thead>
<tr>
<th>Number of students</th>
<th>Poznan School of Banking</th>
<th>Poznan University of Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>F</td>
<td>M</td>
</tr>
<tr>
<td>153</td>
<td>111</td>
<td>42</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level of study</th>
<th>Bachelor (BA)</th>
<th>Master (MA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>BA</td>
<td>MA</td>
</tr>
<tr>
<td>72</td>
<td>47,06</td>
<td>52,94</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>19-25</th>
<th>26 and older</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>143</td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Interest in management career</th>
<th>Yes</th>
<th>%</th>
<th>Yes</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>122</td>
<td>79,74</td>
<td>117</td>
<td>69,93</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Interest in founding a business venture</th>
<th>Yes</th>
<th>%</th>
<th>Yes</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>107</td>
<td>69,93</td>
<td>114</td>
<td>30,07</td>
</tr>
</tbody>
</table>

Source: Research

Renata Krykała-Schaefer
Table 4. Differences between perceived culture practices and values of Polish students

<table>
<thead>
<tr>
<th>Cultural dimensions (PRACTICES)</th>
<th>Mean</th>
<th>Rank</th>
<th>Cultural dimensions (VALUES)</th>
<th>Mean</th>
<th>Rank</th>
<th>VALUES - PRACTICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uncertainty avoidance</td>
<td>4,0</td>
<td>5</td>
<td>Uncertainty avoidance</td>
<td>4,7</td>
<td>4</td>
<td>0,7</td>
</tr>
<tr>
<td>Future orientation</td>
<td>3,55</td>
<td>9</td>
<td>Future orientation</td>
<td>4,69</td>
<td>5</td>
<td>1,14</td>
</tr>
<tr>
<td>Power distance</td>
<td>5,27</td>
<td>1</td>
<td>Power distance</td>
<td>2,76</td>
<td>9</td>
<td>-2,51</td>
</tr>
<tr>
<td>Institutional collectivism</td>
<td>4,48</td>
<td>3</td>
<td>Institutional collectivism</td>
<td>4,23</td>
<td>7</td>
<td>-0,25</td>
</tr>
<tr>
<td>Human orientation</td>
<td>3,67</td>
<td>8</td>
<td>Human orientation</td>
<td>5,21</td>
<td>3</td>
<td>1,54</td>
</tr>
<tr>
<td>Performance orientation</td>
<td>3,86</td>
<td>6</td>
<td>Performance orientation</td>
<td>5,84</td>
<td>1</td>
<td>1,98</td>
</tr>
<tr>
<td>In-group collectivism</td>
<td>4,84</td>
<td>2</td>
<td>In-group collectivism</td>
<td>5,66</td>
<td>2</td>
<td>0,82</td>
</tr>
<tr>
<td>General egalitarianism</td>
<td>3,75</td>
<td>7</td>
<td>General egalitarianism</td>
<td>4,66</td>
<td>6</td>
<td>0,91</td>
</tr>
<tr>
<td>Assertiveness</td>
<td>4,1</td>
<td>4</td>
<td>Assertiveness</td>
<td>3,2</td>
<td>8</td>
<td>-0,9</td>
</tr>
</tbody>
</table>

Source: research.
6. Preferred leadership styles of young Poles- conclusions of the GLOBE Student research

The GLOBE conceptual model works on the assumption, that culture plays an important role in influencing the perception of the members of a given culture about which leadership attributes and behaviors are desirable and effective [Dorfman, Hanges, Brodbeck 2004, p. 671].

The results of the research indicate which personal and professional attributes an effective leader should have, according to the perception of young Poles. Respectively, the results specify whom Polish respondents will respect as an effective leader and whom they will be likely to follow. When individuals think about effective leader ways of behavior, they are more influenced by the value they place on the desired future than by their perception of current realities. As the GLOBE team researchers suggested: “Leaders are seen as the society’s instruments for change. They are seen as the embodiment of the ideal state of affairs” [House et al. 2004, pp. 275–6].

In connection to the preferred leadership styles research results show that Polish students perceive the type of charismatic/value based leader as the most effective (mean value 5,47). Other leadership styles that are rated high by Polish respondents as effective leaders are a team-oriented leader (with mean value 4,98) and a human- oriented type of leader (mean value 4,67). An autonomous leader (4, 24) as well as participative leadership style (4, 03) are viewed as less effective. The self-protective leadership style is perceived as ineffective (3, 58).
Figure 2 illustrates preferences in regard to the set of six leadership styles as indicated by young Poles within the GLOBE Student research (with mean values of effectiveness on the scale 1=least effective leadership, 7=the most effective).

Source: research.

Charismatic/value based leadership is the most preferred leadership dimension according to the research results. Although the notion ‘charisma’ is hard to define, prevailing features of this type of leader are: to inspire others, motivate them to high performance, at the same time stressing key values which are important to the whole group. The integrity of their personalities lie in the fact that subordinates assume that what they say is in alliance with what they think and do. The authors of the GLOBE project also hint that charismatic / value-based leadership might bear similarities to what others have called “transformational leadership” [House et al. pp. 61, 65].

The second most effective style of leadership, according to Polish students, is team-oriented leadership. This type of leader has the ability to integrate people on the basis of one unifying vision. He or she is a team player, able to clarify meanings and goals of the team work to his/her subordinates. His/her dominant personality characteristics are diplomacy, honesty, kind-heartiness, tactfulness and administrative competency.

The least preferred type of a leader is the self-protective leader. Attributes which are tied with this type of leader are coyness and conflicting. He/she cares only for him/herself, ignites insecurity in others, at the same time relying strongly on bureaucratic procedures.

While there have been a number of studies attempting to identify personal characteristics of the charismatic leader, one of the best documented has isolated 4 characteristics. The charismatic leaders have a vision, are willing to take risk to achieve that vision, are sensitive to both environmental constrains and followers needs [Conger, Kanungo 1998, p. 94].
In all six leadership styles mentioned above some sub-types can be differentiated. These sub-types describe leadership traits and behaviors that are evaluated as the most effective and preferred for a competent and respected leader.

Picture 3 depicts 21 primary leadership variables in a diagram form. Mean values are representing the degree of relative effectiveness of assessed variables on the scale 1 to 7 (1=least effective, 7=the most effective).

**Picture 3.** Mean values of 21 primary leadership variables within Polish culture

![21 Leadership Variables - Poland](image)

Source: research.

**7. Do managers and students in Poland share the same perception of societal culture and leadership expectations?**

The above results of the GLOBE Student project for Polish students allow to answer the questions on differences in culture and leadership expectations of the new generation of future managers. The students of business and engineering may have different perceptions of the existing societal culture, having different cultural values and expecting another kind of leadership behavior than the group of middle managers which was investigated in the GLOBE project.

Tables 5 and 6 present the results of the Polish students from the GLOBE Student project in comparison to the results of the Polish middle managers from the GLOBE (mean values).
Table 5. Perception of cultural practices of Polish students and Polish middle managers compared

<table>
<thead>
<tr>
<th>Cultural dimension practices, culture „as it is”</th>
<th>GLOBE Student</th>
<th>GLOBE Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uncertainty Avoidance</td>
<td>4</td>
<td>3,62</td>
</tr>
<tr>
<td>Future Orientation</td>
<td>3,55</td>
<td>3,11</td>
</tr>
<tr>
<td>Power Distance</td>
<td>5,27</td>
<td>5,1</td>
</tr>
<tr>
<td>Institutional Collectivism</td>
<td>4,48</td>
<td>4,53</td>
</tr>
<tr>
<td>Humane Orientation</td>
<td>3,67</td>
<td>3,99</td>
</tr>
<tr>
<td>Performance Orientation</td>
<td>3,86</td>
<td>3,89</td>
</tr>
<tr>
<td>In-group Collectivism</td>
<td>4,84</td>
<td>5,52</td>
</tr>
<tr>
<td>Gender Egalitarianism</td>
<td>3,75</td>
<td>4,02</td>
</tr>
<tr>
<td>Assertiveness</td>
<td>4,1</td>
<td>3,75</td>
</tr>
</tbody>
</table>

Source: Research and Bakacsi et al. 2002 p. 76.

Table 6. Perception of cultural values of Polish students and Polish middle managers compared

<table>
<thead>
<tr>
<th>Cultural dimension values, culture „as it should be”</th>
<th>GLOBE Students</th>
<th>GLOBE Managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uncertainty Avoidance</td>
<td>4,7</td>
<td>4,71</td>
</tr>
<tr>
<td>Future Orientation</td>
<td>4,69</td>
<td>5,2</td>
</tr>
<tr>
<td>Power Distance</td>
<td>2,76</td>
<td>3,12</td>
</tr>
<tr>
<td>Institutional Collectivism</td>
<td>4,23</td>
<td>4,67</td>
</tr>
<tr>
<td>Humane Orientation</td>
<td>5,21</td>
<td>5,3</td>
</tr>
<tr>
<td>Performance Orientation</td>
<td>5,84</td>
<td>6,12</td>
</tr>
<tr>
<td>In-group Collectivism</td>
<td>5,66</td>
<td>5,74</td>
</tr>
<tr>
<td>Gender Egalitarianism</td>
<td>4,66</td>
<td>4,52</td>
</tr>
<tr>
<td>Assertiveness</td>
<td>3,2</td>
<td>3,72</td>
</tr>
</tbody>
</table>

Source: Research and Bakacsi et al. 2002 p. 76.
8. Discussion

The authors of the European Values Survey assert that “population replacement as one generation succeeds another”, is the main factor for explaining value change in Europe [Barker et al. 1992, p. 5]. The younger generation is socialized in the value and belief systems of the older generation through societal interaction. The process of learning involves questioning existing values and, in some cases, a revolt against prevailing practices [Keating et al. 2002, p. 637]. Hofstede argues that generation differences in respect of values are often exaggerated. Many differences and values between generations will be just normal attributes of age, which will repeat themselves for each successive pair of generations [1991, p. 17]. We could ask the question whether the data reveal differences between managers and students, which could indicate either a shift in cultural practices and values or a generational influence within Poland.

Looking at Tables 5 and 6 the overall impression is that there is a tendency to a similar perception of cultural practices and values among students and managers. There are, however, some interesting and significant differences which are worth mentioning. As far as cultural practices are concerned (culture “as it is”), students seem to have more a positive view on the future orientation in the Polish society and at the same time they perceive the higher extent of assertiveness, uncertainty avoidance and power distance in the Polish society than middle managers do. On the other hand, students are more critical in respect to human orientation, gender egalitarianism and in-group collectivism and consider them to be more negatively developed than managers do.

The cultural values similarity (culture as “it should be”) seems to be again rather obvious, even though there are some significant differences. The overall impression is that nearly in all dimensions students scored lower than middle managers except for gender egalitarianism (4, 66 vs. 4, 52). As for gender egalitarianism, it is interesting to observe that Polish students scored lower than managers for practices but higher for values. This represents a shift in emphasis rather than a sudden abrogation of values. Today, equal opportunity in legislation exists but the challenge is to ensure it in practice. Relatively low score for societal practices in this dimension indicates that many years after adopting equal opportunities both in Europe and in Poland, a man as the traditional holder of authority was reluctant to support this shift [Keating et al. 2002, p. 646]. An interesting trend can be observed in power distance dimension. Students scored lower than managers in this dimension (2,76 vs. 3,12) and there is a substantial drop between “as it is” and as “it should be”. It could be seen as a visible consequence of Polish young generation’s growing readiness to question authority and of increased democracy in the society. For future orientation, what is striking is the profile of values. Students, like managers, have “greater exposure to modernizing trends” [Schwarz 1994, p. 91], which might presuppose
the existence of a stronger focus on the future, yet Polish students show a significantly lower level of future orientation than managers (4,69 vs. 5,2). This might be explained by the fact that students may not view the prospect of taking care of the future in the same way as managers and thus remain more oriented toward the present. Weaker future orientation is conceivably a generation issue, reflecting the belief of the younger generation that the future will look after itself. This is supported by Hofstede's assertion that differences between generations are simply normal attributes of age [1991, p. 17], a point which can be seen as a generational impact on value change [Keating et al. 2002, p. 648].

As far as institutional collectivism is concerned we can observe an interesting trend as well. There is a drop between culture “as it is” and culture as “it should be”. The findings support the view expressed by some authors [i.e. Baker et al. 1992] that industrialization, modernization and rapid economic growth result in secularization within society and a movement toward individualization.

In regard to leadership styles Table 7 shows results of the Polish students within the GLOBE Student project in comparison to the results of the Polish managers from the GLOBE (mean values).

**Table 7. Leadership ideals of Polish students compared with Polish middle managers**

<table>
<thead>
<tr>
<th></th>
<th>GLOBE Students</th>
<th>Rank</th>
<th>GLOBE Managers</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHARISMATIC/ VALUE</td>
<td>5,47</td>
<td>1</td>
<td>5,67</td>
<td>2</td>
</tr>
<tr>
<td>BASED</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEAM - ORIENTED</td>
<td>4,98</td>
<td>2</td>
<td>5,98</td>
<td>1</td>
</tr>
<tr>
<td>SELF-PROTECTIVE</td>
<td>3,58</td>
<td>6</td>
<td>3,53</td>
<td>6</td>
</tr>
<tr>
<td>PARTICIPATIVE</td>
<td>4,03</td>
<td>5</td>
<td>5,05</td>
<td>3</td>
</tr>
<tr>
<td>HUMANE-ORIENTED</td>
<td>4,67</td>
<td>3</td>
<td>4,56</td>
<td>4</td>
</tr>
<tr>
<td>AUTONOMOUS</td>
<td>4,24</td>
<td>4</td>
<td>4,34</td>
<td>5</td>
</tr>
</tbody>
</table>

Overall, the prototypes of excellent leadership indicated in the group of the Polish students and Polish managers seem, in some ways, similar to each other. Both groups perceive charismatic /value based leadership and team oriented leadership as positively endorsed to leadership effectiveness and self-protective leadership style as negatively endorsed. Human orientation in leadership is perceived by young Poles more positively than in case of middle managers. On the other hand, Polish students perceive attributes of autonomy (e.g. individualistic, independent, and unique) to facilitate excellent leadership more strongly than middle managers do. Preferences for autonomous leadership can be seen
as indication of stronger emphasis in terms of societal individualism. As for participative leadership styles, it is interesting to observe that in many cultures (i.e. Anglo clusters), where individualism is strongly valued, subordinates are more valued for their contributions at every level in the society and therefore, are expected to take a more active role in leadership, which goes hand in hand with preference for participative leadership style. In terms of young Poles it seems not to be the case. On one hand they expressed strong preference for low power distance as a societal value but at the same time a leader is trusted to get on with the job on behalf of his/her subordinates. This interesting observation calls for more in-depth analysis.

9. Conclusion

In the contemporary global world there is a serious need for the study of intercultural differences.

The main purpose of this paper was to describe the current state of Polish culture on the basis of nine cultural dimensions and to illustrate the preferences of our respondents- Polish business and engineering students – in regard to what Polish culture should be like in the future. Next, leadership preferences were examined and the concept of an effective and worth following leader was formed according to the research results. The author of this paper is aware that results presented here only partially allow to understand fully the nature of the studied phenomena and an international comparison of the Polish research data should reveal further important facts linked to the topic of intercultural similarities and differences.

On practical level, the results are relevant for employers, universities and students themselves. The employers, particularly HR departments, could get an image of the cultural profile of future managers and leaders, basing on which they can design development programs for present Polish managers and leaders, according to the trends expressed by students’ population. Universities could benefit from these findings when designing the strategies aiming at preparing the students for the labor market, in creating and developing leadership behavior and attributes among young generation by means of courses and programs for perspective managers and leaders. Students themselves could take into account results presented in this paper when clarifying and motivating their options of creating their own business or of following a management and leadership career.

The value of this research could be increased by adding qualitative methods to the present quantitative ones (focus group analyses). At the same time expanding the geographic context of the study to additional countries and regions will not only increase the total number of units and consequently allow the researchers to perform additional tests, but will also enable intercultural comparison of results.
References


GLOBE culture and leadership scales guidelines and syntax for the GLOBE leadership and culture, 2006. available at http://thunderbird.edu/wwwfiles/ms/globe/instruments.asp [access , August 2010].


1. Introduction
In the course of the last 20 years comprehensive changes and important reforms have taken place within the Polish system of government at all levels: local, regional, national and supranational. The aim of this paper is to contribute to an understanding of the influence of cultural factors on the contemporary management of territorial organizations (or territorial units). The challenges posed by globalization, affecting all managerial levels, and, furthermore, Poland’s accession to the European Union, force its public administration to overcome certain weaknesses crippling its potential. This paper presents the cultural nature of the conditionings of these restrictive elements.

2. Managerial context
The theme of the paper can be considered in several, different contexts. The first one is managerial. An analysis of the managerial activity of the public administration should reflect the organizational aspect of governance. So, the author uses the notion of a territorial organization for territorial units, taking into consideration three aspects of their nature. Territorial organizations can be defined on the basis of three main determining conditions:

- The area of activity – a territorial organization is a unit of land where public administration is executed (spatial and legal condition),
- The set of people making up a territorial organization consists of a community of citizens living within the territory (social and political condition),
- The formal basis of activities of the territorial community is structured by mutual relationships resulting from legal acts determining the development and current running of public affairs (economic and managerial condition).
Taking this definition into consideration, we can give an overview of the \textbf{territorial management} - or the management of territorial organizations - as:

- directing (steering) the inner and outer territorial organization's systems,
- leading the territorial organization's structures (administrative subunits and offices),
- achieving goals, reflecting public interests, which are mainly referred to as environmental, social and economic aspects of development and/or just running territorial units.

\textbf{Political authority} should thus be considered to reside within the managing entity of the territorial organization. It is thus impossible to distinguish certain aspects of territorial management from those of territorial governance. Much has been written about the characteristics of the territorial management. In his previous papers the author described certain crucial elements of this administrative branch of the public management [cf. Noworól 2003, 2007]. The author presented a territorial management model and identified styles of the territorial management and the nature of structures used in public governance processes. In brief, we can distinguish styles and organization structure types, which can be recognized as lying between the extreme forms:

- according to a (vertical) direction of steering/management, we can identify extreme styles:
  - an \textbf{autocratic} approach (top down), characteristic of a totalitarian state, and
  - a consultation / \textbf{participatory} approach (bottom up) – characteristic of a democratic state;
- according to a (horizontal) dimension of directing/management, we can identify extreme styles:
  - a narrow approach, \textbf{following regulations}, and
  - a \textbf{strategic management approach};
- according to the degree of public knowledge, we can identify extreme styles:
  - a \textbf{system of coteries}, accompanied by propaganda, and
  - \textbf{transparency} leading to accountable society;
- according to attitudes of public officers we can identify extreme styles/attitudes:
  - \textbf{bureaucracy}, and
  - \textbf{public service};
  - according to the supply system of steering/management, we can identify extreme attitudes:
    - an attitude oriented to a centralized system based on \textbf{taxes and the budget}, and
    - an attitude oriented to a \textbf{decentralized} and more economic system of financing, accepting purchase of services;
– according to people's participation in the territorial management, we can identify extreme attitudes:
  • silent and anonymous attendance, and
  • public participation in communities’ lives;
– according to finance management structures, we can identify:
  • budgetary units, and
  • polycentric, disaggregated legal and social entities providing services and assuring quality of life.

The above mentioned system of arrangement of territorial management conditionings discloses many imperfections in the Polish public administration performance. However, the aim of this paper is not to analyze these phenomena. We will rather focus on the roots of the deficiencies described in other papers. [Cf. Agh 2010; Noworól 2008]

3. Urban challenge context

The contemporary world is undergoing enormous and rapid changes. One can observe these changes in the economy, in the environment and the climate and lastly – in the social and cultural behavior. Two fundamental processes, globalization and competitiveness, have the biggest impact on territorial organizations. The point is that globalization and the shift towards knowledge-based economy have had diverse effects on territorial competitiveness (called glocalization). Competitiveness forces territories to contribute to the creation of economic activities, and to attract people and capital in a competitive environment. According to M. Sudarskis [2010], the metropolitan challenges of today can be arranged as follows:
  – globalization as an economic challenge,
  – sustainability as an environmental challenge,
  – cohesion as political, social and cultural challenges.

So, priority fields for public intervention include such areas as: the control of urban development and urban regeneration, mobility and transport, resources for production, influencing the labor market, technology and financing, and finally, governance as an effective and democratic process. Contemporary challenges in the territorial management require a new governance approach, taking into consideration:
  – participation in decision making processes,
  – higher quality of public and social services,
  – transparent information policies, and coherent political visions and strategies.

We can also observe a new generation of global problems. Global security, ecological efficiency, reduction or even disappearance of agricultural land, cultural mutation (from a closed to an open world) and ageing of the population
– are all becoming determinants of new international policies that must be considered by governments [based on Sudarskis M., 2010]. The main challenge for the public administration is the great shift from Weber’s hierarchic bureaucracy to public governance, dealing with networks of public bodies, nongovernmental organizations and businesses. They all are active internationally and affect one another in different connected or unconnected fields.

4. International management context – multi-level governance

Poland is a member state of the European Union. This is an important feature and a determinant factor for the territorial management at all governance levels within the country. K. Szczerski emphasizes that multi-level governance implies changing relationships between many actors, operating at different levels of political systems and in different sectors: public, social and private. [2005, p. 12] According to A. Agh “The global crisis has strengthened the pressure for public-administration reforms in the EU, above all in East-Central Europe (ECE), and beyond.” [Agh 2010, p. 9] This author notes the types of challenges in the EU. In the first place, at the EU27 level “there is the need to create new transnational regulatory institutions at the top as “metagovernance” and to introduce new common policies that radically transform the horizontal and vertical institutional relationships in order to overcome the institutional crisis…” [2010, p. 9] A. Agh observes a “deepening” of the process, i.e. the extension of multi-level governance and the multi-actor participative democracy have to be continued, since the transnational institutions have to be more balanced with the structures of the meso-governments. The multi-level governance structures (basically the meso-governments) are still weak in the new member states. So, democratic institution-building has to be completed in the new member states on the meso- and micro-levels as well. Besides, the new member states have to catch up with the latest developments in the old member states as well as on the EU level. A. Agh calls it “structural adjustment”. A. Agh defines three partnership triangles in the EU. The first partnership macro-triangle is between: the EU transnational institutions, the nation-state institutions and the sub-national actors and agencies. In this macro-triangle, the nation state intermediates between the EU and regional levels and transmits the Europeanization effect top-down to the national and sub-national actors, and it represents their national-local interests bottom up (vertical). The second partnership meso-triangle appears at the member state level between the nation state, the social actors horizontally and the territorial actors vertically. In this meso-triangle, both the social and the territorial policy communities have their action fields. The third partnership micro-triangle(s) are at the sub-national level of these social and territorial actors, and they have:
- both horizontal and vertical, or
- both policy (sectorial) and territorial dimensions.
These micro-triangles have a plurality of distinct policy networks or communities, in which the state-administration units or special state agencies are engaged in an active co-operation with the local - social, business, civil and territorial - non-state actors. The introduction and extension of multi-level governance structures cause a participatory revolution. [Agh 2010, pp. 19–21] This has particular significance for Poland as one of the new member states. A. Agh maintains that “the multi-actor democracy is largely missing or hardly developed in those states. The social and territorial actors are weak, their competences are limited, and their role in the decision-making system is restricted. EU membership has meant tremendous pressure for them in this respect, first of all not in the political dimension, but much more in practical dimensions of the cohesion policy for an urgent capacity-building.” [2010, p. 20] Even if we can observe that there are changes caused by constitutional arrangements in the second partnership triangle, the subnational institutions are still weak. In consequence “the third partnership triangles, the horizontal policy networks and/or communities at the regional level are hopelessly missing or weak, so is the system of their vertical network governance that incorporates the subregional territorial and social actors.” [2010, p. 20]

A. Agh’s concept of multi-level governance reflects organizational conditionings of public, private and non-governmental entities within the European Union. This perspective is extremely important in Poland, because of the important development stimulus resulting from the EU cohesion policy. However, there are some other important factors influencing international management. Let us not forget about the activities of transnational corporations – their influence is sometimes exaggerated, but it is still very important [cf.: Guedes, Faria 2007].

5. Geert Hofstede’s Cultural Dimensions

In order to understand the constraints and the weaknesses of public administration in Poland, we can refer to Geert Hofstede’s Cultural Dimensions concept. At this point characteristics are worth mentioning. G. Hofstede created his own indexes of organizational culture. His so-called Value Survey Module is designed for measuring culture-determined differences between matched samples of respondents from different countries and regions. It consists of 20 content questions and 6 demographic questions. At his international website, G. Hofstede presents a description of the indexes as well as scores calculated for more than 70 countries.

The Hofstede indexes are:
- “Power Distance Index (PDI) that is the extent to which the less powerful members of organizations and institutions (such as the family) accept and expect that power is distributed unequally. This represents inequality (more versus less), but defined from below, not from above. It suggests that a society’s level of inequality is endorsed by the followers as much as by the leaders. ...
- Individualism (IDV) versus its opposite, collectivism, that is the degree to which individuals are integrated into groups. On the individualist side we find societies in which the ties between individuals are loose: everyone is expected to look after him/herself and his/her immediate family. On the collectivist side, we find societies in which people from birth onwards are integrated into strong, cohesive in-groups, often extended families (...) which continue protecting them in exchange for unquestioning loyalty. The word 'collectivism' in this sense has no political meaning...

- Masculinity (MAS) versus its opposite, femininity, refers to the distribution of roles between the genders which is another fundamental issue for any society, for which a range of solutions is found. ... The assertive pole has been called ‘masculine’ and the modest, caring pole ‘feminine’. The women in feminine countries have the same modest, caring values as the men; in the masculine countries they are somewhat assertive and competitive, but not as much as the men, so that these countries show a gap between men’s values and women’s values.

- Uncertainty Avoidance Index (UAI) deals with a society’s tolerance for uncertainty and ambiguity; it ultimately refers to man's search for Truth. It indicates to what extent a culture programs its members to feel either uncomfortable or comfortable in unstructured situations. Unstructured situations are novel, unknown, surprising, different from usual. Uncertainty avoiding cultures try to minimize the possibility of such situations by strict laws and rules, safety and security measures, and on the philosophical and religious level by a belief in the absolute Truth; (...) The opposite type, uncertainty accepting cultures, are more tolerant of opinions different from what they are used to; they try to have as few rules as possible, and on the philosophical and religious level they are relativist and allow many currents to flow side by side.

- Long-Term Orientation (LTO) versus short-term orientation: this fifth dimension was found in a study among students in 23 countries around the world, using a questionnaire designed by Chinese scholars. It can be said to deal with the Virtue regardless of the Truth. Values associated with Long Term Orientation are thrift and perseverance; values associated with Short Term Orientation are respect for tradition, fulfilling social obligations, and protecting one’s ‘face’.” [Hofstede 2010]

This short summary of G. Hofstede’s concept is the basis for further analyses carried out by the author of this paper. Thus, let us compare scores attributed in Hofstede’s researches to Poland and some chosen countries.¹ The choice was made basing on:

¹ It is worth noting that for Poland, Czech Republic, Slovakia and Russia – the values were estimated by the G. Hofstede research group (and not measured).
The list of scores is presented in the table below.

**Table 1.** Comparison of G. Hofstede indexes attributed to Poland and chosen countries

<table>
<thead>
<tr>
<th></th>
<th>Country</th>
<th>PDI</th>
<th>IDV</th>
<th>MAS</th>
<th>UAI</th>
<th>LTO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Poland *</td>
<td>68</td>
<td>60</td>
<td>64</td>
<td>93</td>
<td>32</td>
</tr>
<tr>
<td>2.</td>
<td>Germany</td>
<td>35</td>
<td>67</td>
<td>66</td>
<td>65</td>
<td>31</td>
</tr>
<tr>
<td>3.</td>
<td>Czech Republic</td>
<td>57</td>
<td>58</td>
<td>57</td>
<td>74</td>
<td>13</td>
</tr>
<tr>
<td>4.</td>
<td>Slovakia *</td>
<td>104</td>
<td>52</td>
<td>110</td>
<td>51</td>
<td>38</td>
</tr>
<tr>
<td>5.</td>
<td>Russia *</td>
<td>93</td>
<td>39</td>
<td>36</td>
<td>95</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>Norway</td>
<td>31</td>
<td>69</td>
<td>8</td>
<td>50</td>
<td>20</td>
</tr>
<tr>
<td>7.</td>
<td>Australia</td>
<td>36</td>
<td>90</td>
<td>61</td>
<td>51</td>
<td>31</td>
</tr>
<tr>
<td>8.</td>
<td>New Zealand</td>
<td>22</td>
<td>79</td>
<td>58</td>
<td>49</td>
<td>30</td>
</tr>
<tr>
<td>9.</td>
<td>United States</td>
<td>40</td>
<td>91</td>
<td>62</td>
<td>46</td>
<td>29</td>
</tr>
</tbody>
</table>

*Estimated values

Highest scores - bolded

[Source: Hofstede G., 2010]

The interpretation of the table above allows us to discover multiple relationships, mostly being the domain of political sciences. In the context of this paper, it is important to note that Poland is characterized by its:

- very high Uncertainty Avoidance Index – only Russia presents a slightly higher score, and
- relatively high Power Distance Index – especially if compared with indexes of countries representing a very high level of human development.

In the opinion of the author, these features are the predominant factors influencing the situation in the Polish public administration. This issue is described below.
6. Cultural aspects of Polish public administration

In order to understand the cultural context of the public administration in Poland, we should refer to researches and diagnoses concerning social capital in the country. According to F. Fukuyama “Social capital is an instantiated informal norm that promotes co-operation between individuals. In the economic sphere it reduces transaction costs and in the political sphere it promotes the kind of associational life which is necessary for the success of limited government and modern democracy.” [Fukuyama 2001, p. 7] The influence of social capital on public affairs is enormous. According to F. Sabatini “Social networks can ... be considered as a powerful mean to foster the diffusion of information and knowledge, lowering uncertainty and transaction costs.” [Sabatini 2005, p. 162]

It is worth recalling F. Fukuyama’s important observation “Social capital is what permits individuals to band together to defend their interests and organize to support collective needs; authoritarian governance, on the other hand, thrives on social atomization.” [Fukuyama F., 2002, p. 26]. The social capital conditions the basic confidence of the population in public services and in public administration offices.

Polish researchers have expressed their concern about the low level of the social capital in Poland. J. Czapiński even emphasizes that Poland does not meet the criteria of the civil society, taking into consideration measures related to the social capital. That author quotes the European Social Survey of 2006 and 2008, which placed Poland as last but one among European Union Countries with respect to the general confidence of the population.² [Czapiński, Panek 2009, p. 275] J. Czapinski notes that Poles live in a country of more and more efficient individuals and – at the same time – with a permanently inefficient community. [2009, p. 282]

All the above mentioned reflections concerning the position of Poland – taking into account G. Hofstede indexes and measures of readiness to build a civil society – allow us to analyze the weaknesses crippling the potential of the Polish public administration. An analysis is presented in Table 2, making use of the classification system outlined above, distinguishing styles and organization structures of territorial management. The table compares:

- styles and structures:
  - representing a bureaucratic and a hierarchical model of territorial management³ – column 2,
  - characterizing a multi-level governance model of territorial management, more developed and applicable to a society of networks – column 3

² This phenomenon was measured by an indicator showing the percentage of the population aged 16 years old and above who trust other people.
³ Based mostly on M. Weber’s ideas.
– cultural aspects crippling the managerial capacity of the Polish public administration – column 4.

**Table 2. Cultural aspects and conditionings limiting Polish public administration potential**

<table>
<thead>
<tr>
<th>Styles / Structures</th>
<th>Bureaucracy / Hierarchy</th>
<th>Multilevel Governance</th>
<th>Cultural Aspects Crippling Management Capacity in PL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Direction of steering/management</td>
<td>Totalitarianism / autocracy</td>
<td>Democracy / state of law</td>
<td>- High PDI &amp; UAI Hofstede Indexes (attitude of people) - Low Social Capital</td>
</tr>
<tr>
<td>Range of steering/management</td>
<td>Narrow, following regulations</td>
<td>Strategic management</td>
<td>- High PDI &amp; UAI Hofstede Indexes (attitude of managers / leaders)</td>
</tr>
<tr>
<td>Degree of public knowledge</td>
<td>System of coteries</td>
<td>Transparency – Society of accountability</td>
<td>- High PDI &amp; UAI Hofstede Indexes (attitude of managers / leaders)</td>
</tr>
<tr>
<td>Attitudes of public servants</td>
<td>Bureaucracy</td>
<td>Public service</td>
<td>- High PDI Hofstede Index (attitude of public officers)</td>
</tr>
<tr>
<td>Supply of steering/management system</td>
<td>Centralized [based on budget] financing</td>
<td>Decentralized [efficient] financing</td>
<td>- High UAI Hofstede Index (attitude of people) - Low Social Capital</td>
</tr>
<tr>
<td>Attendance in territorial management</td>
<td>Anonymous attendance</td>
<td>Public participation</td>
<td>- High PDI Hofstede Index (attitude of people) - Low Social Capital</td>
</tr>
<tr>
<td>Structures of finance management</td>
<td>Budgetary units</td>
<td>Disaggregated networks / Private-public participation</td>
<td>- High UAI Hofstede Index (attitude of managers / leaders)</td>
</tr>
</tbody>
</table>

Source: own study.

The diagnoses, presented in column 4 of Table 2, reveal cultural obstacles indicated in the process of the transition from a style or a type of structure listed in column 2 to a style or a type of structure listed in column 3. Thus,
we can observe how certain cultural patterns, sometimes of an archetypical nature, limit public administration abilities. We can say that Table 2 shows how in Poland “the snake is eating its own tail”. This means that indirectly people cripple themselves. Cultural determinants, resulting from “Uncertainty Avoidance” limit people’s readiness to change social habits. The deepening of the public sector transformation in Poland is conditioned by the common acceptance of such managerial patterns or practices as: public participation, transparency and confidence in the environment of networked, multi-level, public or private organizations.

7. Conclusions
Contemporary challenges in the territorial management force us to take into consideration a networked, multi-level organizational environment. Within the European Union, the multi-actor participative democracy requires adoption of new territorial management styles, which are at the same time compatible with meta-, meso- and micro-levels of differentiated and multicultural political and social entities. During the transition from a bureaucratic administration to “open” public governance, social and cultural obstacles (styles, structures) which cripple management efficiency must be overcome. This phenomenon is extremely important in Poland, where certain cultural factors that are unfavorable to deep social transformation have been identified.

In general, we have to note that cultural aspects determining social capital and, especially, public confidence, are essential for building multilevel territorial management capability. These cultural patterns must be seriously considered in the process of identifying a managerial paradigm in order to:
- understand the world,
- imagine the future,
- set rules for governing a contemporary, democratic and complex society.

Such a paradigm requires a comprehensive public debate that should be undertaken in Poland during the next decades.

Abstract
In the course of the last 20 years, comprehensive changes and important reforms have taken place within the Polish system of government, at all levels: local, regional, national and supranational. The aim of this paper is to contribute to an understanding of the influence of cultural factors on the contemporary management of territorial organizations (or territorial units). The challenges posed by globalization, affecting all managerial levels, and Poland’s accession to the European Union force the Polish public administration to overcome certain weaknesses crippling its potential. The paper presents the cultural nature of the conditionings of these restrictive factors. The author notes that the deepening of the public sector transformation in Poland is conditioned by common acceptance of such managerial patterns or practices as: public participation,
transparency and confidence in the environment of networked, multi-level, public or private organizations. Thus, the identified cultural constraints must be seriously considered in the process of setting rules for governing a contemporary, democratic and complex society.

References


Personal Union as an Instrument of Personnel Policy in International Capital Groups (holdings)

1. Introduction
An international capital group (international holding)\(^1\) can be defined as an organization formed with the purpose of achieving common economic goals or as a capital-based grouping consisting of legally independent economic entities in the form of capital companies (limited liability companies and joint-stock companies) located and operating in different countries. Those entities are linked by durable capital ties and assorted supplementary ties, also in the form of personal connections. One of the most important factors determining the success of economic groupings is a well-designed and efficient personnel policy, understood here as a set of the most important premises and principles for strategic management of human resources. Professional literature presents a wide range of approaches to the subject of personnel policy, from general philosophy of human resource management (narrow approach) to formulation of fundamental goals and tasks of the organization, with the precise definition of tools assigned to each goal and task at hand (broad approach).

In terms of the broad approach, the personnel policy of a capital group is equated with its personnel strategy. Personnel policy is carried out using a wide range of instruments, including a personal union. The range and utilization of individual personnel policy instruments in international holding groups is complicated, due mainly to the cultural context of their operation – in particular, the multicultural environment and the resulting social and organizational

\(^1\) This monograph employs interchangeable terms of: a company grouping, capital group, and holding. It should be noted here that the term holding is a common reference to a capital group in English literature, equivalent to the German term 'Konzern'.

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consequences observed in individual economic entities that make up the holding group.

This monograph aims to analyze the personal union as an instrument of personnel policy in international holding groups and to evaluate its usefulness in solving personal, cultural and organizational problems resulting from multicultural setting of such supra-national groups of companies. The epistemological basis adopted in this monograph consists of research results on domestic and foreign professional literature, as well as empirical studies conducted by this author in companies of Wroclaw and Jelenia Gora region that were subject to acquisitions by foreign sectoral investors and operating as subsidiaries within international holding groups.

2. The objective extent of personnel policy as a determinant of the available range of its instruments.

Depending on the approach, personnel policy can be defined as: a general philosophy of an organization related to its social potential [Kostera 1999, p. 23], long-term goals related to the use and development of social potential [Kożusznik, Adamiec 2000, p. 49], a set of general principles of human resource management in a company or a grouping of companies [Pawlak 2003, p. 24], or durable guidelines for methods employed by a company in realization of its human resource management tasks [Armstrong 2000, p. 234].

A. Pocztowski defines personnel strategy as a cohesive set of activities including formulation of goals, plans and programs oriented towards the development and use of the organization’s human resource capital for the purpose of safeguarding a durable competitive advantage [Pocztowski 2007, p. 60]. In this approach, the personnel strategy may be viewed as a solidification of personnel policy. The personnel policy carried out by a company functioning within a capital group determines the functional, instrumental and institutional dimensions of its personnel function. It provides indicators of the range of authorizations and responsibilities of individual members of the group in relation to their human resource management tasks, to allow and facilitate the integration between the personnel strategy and the general strategy.

The objective scope of personnel policy in the practice of a capital group operation is varied. This diversity is particularly evident in the analysis of the three forms of capital groupings, namely financial, strategic and operational capital group.

In case of financial capital groups, the personnel policy involves formulation of principles, norms and directions adopted when appointing and compensating board members and key specialists who, as a result of a personal union, combine different functions in the management of the parent company and of its subsidiaries. Members of the board in such groups can freely utilize the full range of benefits resulting from personal union, as detailed in a later chapter of this monograph.
The narrow subjective and objective scopes of personnel policy in financial capital groups is the consequence of its specificity, as set by the fundamental goals of the group. In particular, this form of grouping is formed with the purpose of maximizing the investment benefits of the parent company, while minimizing its financial risk. The minimization of the investment risk is typically associated with high level of diversification of principal activities (production and/or services) of the subsidiaries. The parent company strives to maximize its asset portfolio value through acquisition and resale of subsidiary companies, based on the value of those companies and on their financial results [Trocki 2004, p. 83]. Consequently, it seems advisable to limit the objective scope of personnel policy in financial capital groups to the appointment of key managers and specialists on the basis of personal union, while leaving the remaining aspects of personnel policy to the autonomy of subsidiary companies.

In case of strategic capital groups, set up with the purpose of generating and making use of strategic effects based on co-operation of the subsidiary entities, the personnel policy should cover principles and guidelines of all the activities involved in appointing, developing, motivating (remuneration) and transfer of board members and key specialists, as well as shaping cultural values and norms across the company. These activities should support the realization of fundamental (strategic) objectives of the group. As in case of financial capital groups, the subjective range of personnel policy in strategic capital groups is strongly influenced by their specificity, i.e. the character of activities undertaken by the parent company and its subsidiaries. The former concentrates on the task of managing the group as a whole and managing the shares of individual subsidiaries, refraining from operational activities of their own. The subsidiaries, on the other hand, are involved in complementary, relatively diversified operational activities, usually based on a particular phase of production process. Consequently, the subsidiaries should be relatively independent in the process of designing and carrying out the remaining aspects of personnel policy, in conformity with the guidelines set up by the parent company across the group. This applies, in particular, to the subsidiaries’ autonomy in creation of cultural artifacts, which offers the chance of improving the integrating function of organizational culture, supplementing its role of a social and organizational ‘binding power’ in the general structure of a strategic capital group.

Operational capital groups display a wide subjective range of personnel policy, covering regulations and principles in such areas as selection, appointment, personal development, motivation (remuneration), appraisal and mobility of all employee groups, together with the principles of workplace formation, working conditions and organizational culture. One characteristic trait of this form of capital groups is the strengthening of the parent company in its operational activities through the provision of supplementary activities of its subsidiaries. The most pronounced characteristics of operational capital groups, in contrast with
The architecture of financial and strategic groups, is the strength of ties between the parent company and its subsidiaries. The internal organizational structure and principles of operation of operational groups bear close resemblance to the architecture of multi-factory companies. Hence the underlying need to create consistent, comprehensive personnel policy across the group, covering all the employees, from production to management level.

The personnel policy of a capital group, based on the model of human capital, favors integration of general strategy with personnel strategy. This model of personnel policy is employed in those companies and groups that perceive human resources as a genuine form of a company capital. In terms of ‘operational’ dimension, this model places employers in charge of all human resource activities. They invest financial and organizational resources in programs designed to improve and develop personal skills of both regular employees and managerial staff, wage and non-wage motivation systems and instruments (both material and immaterial), as well as safeguarding the most favorable organizational climate. Human resource management based on human capital model prioritizes teamwork and various forms of employee participation, as well as provision of organizational culture based on cooperation and shared activities.

Capital groups that employ personnel policy based on the human capital model, especially those operating on international level, can freely profit from organizational climate that favors the integration of general and business strategies with personnel strategy of a parent company (and/or of the subsidiaries). The executives of both parent company and subsidiary companies strive to employ and retain skilled personnel as well as take interest in developing long-term personal and vocational development activities for both regular employees and the managerial cadres. Such an approach presents favorable conditions for maintaining the atmosphere of cooperation, involvement and loyalty, thus increasing the motivation of workers and managers to undertake effective and efficient realization of goals and tasks entrusted to them by the employer. This also creates a strong incentive for maintaining and developing durable personal ties, an important building block of the overall organizational structure of a capital group operating on the global market.

The personnel policy and personnel strategy of international capital groups, designed in accordance with the human capital model and supplemented by personal and cultural elements, form a much more spacious social dimension with improved potential for employing a relatively wide scope of instruments, such as selection and appointment, regular evaluation, wage- and non-wage-motivation, as well as training and vocational development of employees and managerial staff in international holdings.
3. **Personal union as a source of personal ties in international capital groups**

Personal ties in capital groups are generated when individual persons are appointed to perform separate managerial functions in at least two different companies within a given capital group [Trocki 2004, p. 51]. In the company practice, this kind of ties is obtained through the personal union, involving appointment of key managers of the parent company as members of supervisory boards in subsidiary companies. Personal ties may take on a vertical structure, with one person performing management functions in both parent company and one or more of its subsidiaries, or a horizontal one, when individuals combine different management or supervision functions in several parallel subsidiaries.

The act of performing different functions in the management of several separate and legally distinguished economic entities by a single individual is undoubtedly a manifestation of the strive to strengthen the influence (control) of the parent company over its subsidiaries, both domestic and foreign.

Variants of such personal integration of management within international capital groups are presented in Fig. 1.

**Figure 1.** Variants of personal integration in the management structure of capital groups

![Diagram of personal integration in capital groups with labels for Parent company's Supervisory board and Board of directors and Subsidiary's Supervisory board and Board of directors.]

3.1. Personal union and supervisory boards as factors enhancing the strength of personal ties in international holding groups

A personal union as an organizational instrument generating personal ties within capital groups, can also be perceived from the perspective of supervisory boards operating within the structure of the grouping. Supervisory boards are viewed as an element of dynamic equilibrium between the companies of the group. It may also be useful to present both the benefits (merits) and negative facets of a personal union in the context of its potential functions in maintaining the internal cohesion of international groups.

Supervisory boards can be perceived as a key element of the triad of power groups within a company, i.e. the owners (shareholders), the board of directors and the supervisory board.

The significance of supervisory boards in the functioning of the aforementioned power balance within a company is a result of responsibilities conferred to members of supervisory boards in respect to financial results generated by the company (maintaining the results within the level that is satisfactory for the owners). To perform these functions in an efficient manner, members of supervisory boards should not only produce satisfactory level of competence, but also have sufficient access to all information that may be required for the purpose of maintaining control and taking up informed (rational) strategic business decisions. According to D.A. Nadler, this requirement is in stark contrast with the relatively low supply of highly-qualified staff to man the boards, as observed in the practice of corporate supervision on the global scale [Nadler 2006, pp.102, 107].

Balancing out the operation of the aforementioned triad of corporate governance requires unrestrained exchange of information that warrants control and full responsibility for carrying out the company mission and meeting the most important company's strategic goals. In practical application, however, the equilibrium is often disturbed by insufficient information and lack of effective methods of exercising mutual influence and control, as well as dilution of individual (personal) responsibility [Sonnenfeld 2004, pp. 98–106; Montgomery, Kauffman 2004, pp. 89–97]. Factors that contribute to proper equilibrium of powers within the organizational structure of a capital group include selection of a suitable model for appointing and functioning of supervisory boards and the instrument of personal union.

Professional literature postulates the following models of supervisory boards: passive, legitimizing, involved, intervening and governing [Nogalski, Falencikowski 2010, ss. 359–360].

Passive supervisory boards are characterized by the low level of activity in the area of management board control as well as the limited range of responsibilities for company operation.

The legitimate supervisory boards safeguard corporate governance through supervising the activities of the management board president as well as
appointing successive presidents. This particular model of the supervisory board reflects the obligations of its members to the stockholders and the importance of outside (non-executive) directors in the operations of the supervisory board.

The involved supervisory board is actively concerned with the supervision over the management board operations by forming partnership cooperation with the president and taking up full responsibility for the company financial results.

The intervening supervision board model is adopted in response to a critical situation, such as an economic crisis. Those boards are closely involved in current management affairs, typically issuing their business decisions to the president, often under stressful circumstances.

The governing supervisory board model is characterized by the most pronounced involvement in corporate governance processes. Governing boards actively participate in decision-making, passing their decisions to the management board. This model of supervisory board is recommended for early stages of company development, when key managers lack business experience required to take up informed and rational decisions.

The personal union, along with selecting an appropriate model of supervisory board’s operations, constitute an organisational solution which positively influences the corporate line-up. Its impact on creating personal ties inside an organisation may be significant within an international capital group. Performing professional functions by the same persons, as the so-called expats², in management bodies, in particular in supervisory boards of at least two companies which are a part of a group, frequently located in different continents among various national cultures and in the environment of various organisational cultures, involves a range of benefits and problems alike. The benefits include above all strengthening the integration of a capital group, streamlining the information flows, and a wide transfer of knowledge and skills in the form of good management practice and professional standards of work among companies located in different countries. This, in turn, creates possibilities for a controlling company to have a more thorough insight into the operation of its subsidiaries, and thus makes an owner’s supervision easier.

Benefits arising from personal unions result also from the functions they perform for a group of companies. These functions and their synthetic characteristics are presented in Tab. 2.

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² The term “expat” is an abbreviation of the word “expatriate”, which defines a representative of a controlling company (parent company) who was seconded to work in the supervisory board or management board of a subsidiary which is part of a holding, located outside the country where the controlling company is located.
Table 2. Functions of personal unions in capital groups

<table>
<thead>
<tr>
<th>Function</th>
<th>Synthetic characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complementary</td>
<td>Complementing capital ties through personal union of managers of the controlling company and its subsidiaries, which ensures transferring decisions from the level of the controlling company to the level of subsidiaries without distortions, and “sealing” the network of its influence on the subsidiaries.</td>
</tr>
<tr>
<td>Propagating leitmotif</td>
<td>Increasing the probability of executing and propagating the leitmotif of the founders of the capital group in its clear unchanged form among subsidiaries by the controlling company.</td>
</tr>
<tr>
<td>Integrating</td>
<td>Performing functions of the supervisory board members or the management board members of various companies operating within the capital group, which are located in different countries, by the same persons brings the opportunity to create ties uniting the group into one organisational team. Thus, conditions are created to understand the leitmotif in the same way and to transform it into a vision, which is also understood as a value common to all members of the group.</td>
</tr>
<tr>
<td>Orientating</td>
<td>Orientating actions undertaken by entities of the group in accordance with its leitmotif, e.g. configuring the work of managers and of executive employees.</td>
</tr>
<tr>
<td>Inspirational</td>
<td>Transferring ideas from one company to another one by persons who perform personal unions is an inspiration for their activities. This, in practice, may facilitate undertaking actions which increase the effectiveness of the executed goals and tasks by the managers and employees of subsidiaries on a global scale.</td>
</tr>
<tr>
<td>Reduction of conflicts</td>
<td>Soothing and reducing influence on potential conflicts and tinderboxes in subsidiaries by transferring higher formal positions occupied by persons performing personal unions in the controlling company to its subsidiaries.</td>
</tr>
<tr>
<td>Using most qualified human resources</td>
<td>Achieving the synergy effect by employing their own highly-qualified managers in supervisory boards or management boards of subsidiaries. The simultaneous management of the controlling company gives ground to perform all the above enumerated functions of a personal union on a global scale.</td>
</tr>
</tbody>
</table>

The above mentioned threats may concern, among others, expats’ difficulties to assimilate, cultural shock resulting from a strong clash of different standards, values and cultural artefacts within a corporation, as well as of the phenomenon of multiple power which consists in the necessity to subordinate high-rank managers in subsidiaries to several high-rank superiors based in the country which is the location of a subsidiary, and - at the level of the controlling company management board - problems with convergence of organisational cultures, and manifestation of the so-called corporate cynicism [Zając Cz., 2009, pp. 50-58]. The phenomenon of corporate cynicism consists, on the one hand, in the excessive use of manipulation by the management staff [Winn 2003; Miroński 2000], awarding the employees who, at the price of promotion, are capable of disposing of numerous “inconvenient” employees, and, on the other hand, at the same time, in publicly promoting the application of the principles of fair and subjective treatment of subordinates and professional solving social problems in the enterprise, and popularising employees’ behaviour based on duplicity and ruthlessness, and even insincerity towards superiors and co-employees. The phenomenon fairly frequently accompanies the stay of the expats who are employed under the personal union in the management boards of the subsidiaries in the same subsidiaries of international holdings.

2.2. The results of expats’ stay in subsidiaries of international corporations located in Poland – synthetic research results

The results of the research carried out by the author indicate the following manifestations of problems arising from expats’ stay in subsidiaries of international holdings located in Poland [Zając 2008, pp. 381–392 ]³:

- difficulties with getting accustomed to each other by the Polish managers and their foreign counterparts caused by the language barrier (2 cases). Another social problem resulting from the lack of command of the English language among some of the Polish constructors arose in one of the enterprises (after the first acquisition). It was necessary for the manager to solve a personal conflict which arose between new specialists from outside of the enterprise employed by the director representing the new owner, who had a command of English but did not know the reality and specificity of the new work environment, and

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³ The research was carried out in years 2006–2008 in 10 large enterprises located in Wrocław and Jelenia Góra representing the financial, chemical and machinery industries, and services. As a result of acquisitions, the enterprises became part of international corporations as subsidiaries. The research concerned a variety of social (including cultural) and organisational problems accompanying the operation of those entities following their acquisition by foreign industry investors. The research was conducted with the focused interviews method through a categorised questionnaire and a survey. Its results were presented in: Cz. Zając, Social Problems of Mergers and Acquisitions (M&A) of Enterprises, [in:] Herman A., Poznańska K., (ed.) Przedsiębiorstwo wobec wyzwań globalnych, vol. II, Oficyna Wydawnicza Szkoły Głównej Handlowej w Warszawie, Warsaw 2008, pp. 381–392.
and some of the Polish engineers who did not have any command of English. As proved by the interview conducted, the conflict began to result in wrong design and engineering decisions taken by the employees who did not have sufficient professional knowledge but who were supported by the new owner. The problem was solved by introducing English classes conducted for the management staff and specialists, and paid for by the employer;

- indicators of authority shown by managers employed by the representatives of the new owner, which cause bitterness and the sense of being “second-class” employees in the enterprise (2 cases);

- personal “clashes” caused by different approaches to standards of work, business priorities and manners of operation, among others while managing projects by Polish and foreign managers (3 cases); the reason was a low level of management competence on the part of the Polish management staff in those enterprises;

- uncompromising, quickly taken HR decisions resulting in making some members of management boards redundant, and replacing the key management staff (such changes appeared in nine out of ten examined enterprises – but their scope and pace were different), and business decisions causing the above discussed social results, without planning means and actions to amortise the social costs of those changes;

- disparity between the necessity of making savings promoted by the managing expats and the gigantic level of costs generated by them (luxuriously fitted-out houses for foreign managers, extremely high salaries in comparison with the level of remuneration on the Polish labour market, premium class cars);

- indication of corporate cynicism of expats (2 cases);

- problems other than professional, related to finding appropriate schools for expats’ children (1 case).

All those problems were a subject of special interest on part of HR directors, who tried to solve them in a manner which would fully satisfy foreign managers. The interest was caused by the desire to gain recognition of new bosses, and, as a consequence, high evaluation of their work, fear of being made redundant, and awareness of the necessity to prevent the permanent antagonistic division into “us” and “them”, which makes complete social integration impossible. They coincide with the requirements presented in foreign and Polish publications: professional (appropriate competences), personal (personal characteristics, above all predispositions towards quick assimilation into a different work environment), and family-related (moving houses by the family, selecting schools for children, job for the spouse, etc.), and problems of employees seconded to work abroad within an international corporation [West, Count 1997; Cartwright, Cooper 2001, pp. 90–97]. The source of the problems, as it is emphasised by
certain authors, is to be found in the cultural differences of various countries [Cartwright, Cooper, Jordan 1998; Olie 1990, pp. 206–315] and differences in the organisational cultures of acquiring, acquired and merging enterprises.

Unsolved expat problems in the processes of international mergers and acquisitions may lead to stress and cultural shock [Marx 2000], and consequently, apart from personal costs incurred by these people, to serious social problems for entities – both sides of those processes, which prevent forming proper relations between the parent company and its subsidiaries.

The interviews conducted by the author, based on a research questionnaire with HR managers of the acquired enterprises which, following the acquisition, became subsidiaries of holding groups of international corporations, also indicated positive results of seconding representatives of foreign owners to work in Poland in the management boards of the acquired entities. The transfer of good managing practice, the introduction of new standards of expats’ work and professional behaviours, and the necessity to learn English fast, at least at the level ensuring fluent communication, were considered most important (eight enterprises). In the majority of cases, Polish managers were forced to improve their professional qualifications and change their behaviour in a short time. In one case, two crucial managers directly admitted, independently of each other, that due to the standards of teamwork and strong customer orientation mastered during the cooperation with American expats at the time when the enterprise was controlled by an American corporation the enterprise based in Jelenia Góra was able to survive following the bankruptcy of that corporation.

Acquisitions by foreign corporations and international mergers in the examined enterprises also enabled overcoming a strong mental barrier which hampered the need for changes and mobility of numerous managers and employees. They also shaped their business attitudes and the desire to learn, which, from the viewpoint of both enterprises and their employees, should be considered a positive result of the change of an owner. They were a strong impulse for transformations of organisational culture in the values and behaviour applicable in those enterprises until then.

There is also a standpoint to be found in the literature which says that cultural conflicts will not arise only if superiors and subordinates come from the same type of culture, and there is a principle in international business that a foreigner employed in a particular country shall follow local customs [Gesteland 2000, pp. 16].

As it is emphasised by D. Schweiger and J. Walsch, the most crucial cultural issue for the merging enterprises discussed from the point of view of the merger effectiveness is not what the differences between the organisational cultures of the entities are, but whether maintaining those differences is beneficial in the long term [Schweiger, Walsch 1990, pp. 143–145].

In all nine enterprises where the acquiring part was a foreign institutional investor, their influence on the organisational culture of the enterprises was
visible. In four cases its nature was direct: it consisted in introducing new values and initiating managing processes through values (2 cases), changing organisational behaviour standards (2 cases), implementing a system of monitoring employee feelings, which are one of the manifestations of the “operationalisation” of organisational culture (3 cases), as well as attempting to change organisational culture thoroughly (1 case).

In five other cases, new owners began to have an indirect impact on the creation of values and behaviour standards among managers and employees by introducing formalised reporting systems, corporate standards, managing methods and management practice based on strong business and customer orientation.

4. Personal union as a tool of selecting key managers in subsidiaries in international holdings

Forming a personal union and creating an HR policy allow to notice instruments of human resources management in capital groups. However, they are embedded “deeper” in the areas determined by both of the “management tools”. The decomposition of HR policy into specific actions related to gaining managers and employees, and shaping profiles of their professional competences commensurately with the needs and organisational and financial capacity of a capital group allow only to pass to the set of human resources management instruments which may be used by the group’s management.

The personal union should be considered as a reinforcement of the performance of the personal function in a capital group. In the international holding operation practice it may be introduced by, among others, seconding members of the management board, and in larger holdings even by lower rank managers of the controlling company to the management boards or supervisory boards of subsidiaries located beyond the country of the corporation headquarters (location of the parent company) [Jagoda 2000, p. 320].

Taking into consideration the subject of the discussion, forming a personal union may be treated as a form of selecting and employing management staff in holding groups and as an instrument of communication inside the organisation. Only “entering” the selection process provides the possibility to choose particular instruments of recruitment and selection of management board members of subsidiaries. Forming conditions for the development of managers and specialists in international capital groups and their motivation should be linked with applying a variety of tools used in the process of human resources development. Those tools fill in the space defined by planning, organising, conducting and evaluating the effectiveness of trainings, preparing the so-called personnel reserve programmes, succession programmes, planning professional carrier paths, periodical evaluation of managers, and broadly understood motivating, where remuneration for key managers of the capital group plays
the crucial role. Proper matching those tools to the organisational specificity of a particular capital group, its needs, financial resources, and organisational culture undoubtedly has an impact on management effectiveness and positively affects the social integration level within the group.

Staffing key positions in capital groups on the basis of a personal union between the controlling company and subsidiary managements is one of the instruments belonging to the set of staff tools for managing a company. Along with constitutive, strategic, financial, and functional tools, they compose an “arsenal of means” to be applied by managers of capital groups [Romanowska, Trocki, Wawrzyniak 1998, pp. 138–153]. The personal union, as a basis for selecting managers for the most crucial positions in international capital groups, entails a number of benefits. They include:

- facilitating and broadening information inside the group,
- reinforcing the effectiveness of the owner’s supervision,
- increasing the possibility to execute a personnel policy common to the whole group,
- increasing the possibility of promoting the managers of subsidiaries to managing positions in the group, which increases their motivation to work for the whole group,
- reducing costs of recruitment and selection of highly-qualified management staff,
- inflow of “fresh blood” as a result of seconding expats to work in subsidiaries located abroad.

In the opinion of the author, the above listed benefits, which lead to the acceleration and reinforcement of social integration of a capital group, ought to be supplemented with a lower risk of selecting management staff presenting the highest managing level, in comparison with external sources of candidates.

Such a way of selecting management staff in capital groups is not free from disadvantages, which include:

- higher probability of transferring personal conflicts from the level of controlling company management board onto the level of subsidiary supervisory boards and management boards,
- improper introduction of new cultural values to the social structure of a capital group,
- lower possibilities of increasing competences of the group’s management staff due to limited sources of recruitment and selection,
- primacy of interests over the criterion of professionalization of activities concerning the personnel function of a capital group, which reduces the need to reach for various tools to recruit and select candidates for the highest
management positions, including those from the labour market; this may lead to the decrease in the qualification potential of the capital group as a participant of the market gambling in the long term.

- personal, cultural and organisational problems related to the assimilation of expats, which were discussed in the previous part of the paper.

5. Conclusion

The approach based on applying a variety of methods and tools for recruitment and selection is a factor which minimises the negative sides of a personal union as a tool of selecting key managers for crucial management positions in the management bodies of subsidiaries in international holdings. Such an approach allows, in the opinion of the author, to diagnose professional competences of candidates for the highest management positions, and thus, increases the probability of employing persons who have proper qualifications for the positions, and not only those who represent certain stakeholders present inside the group. The wide spectrum of instruments for selecting employees includes, in the opinion of the author, the Assessment Center method and psychological tests as potentially useful for assessing professional competences of candidates for the highest management positions in capital groups. The Assessment Center method (or its elements) seems to be the most appropriate one in meeting the recruitment needs of an international capital group. It allows to assess comprehensively the managing potential of candidates for the highest management positions in subsidiaries, which decreases the risk of making wrong personnel decisions.

Abstract

The paper presents the personal union as a tool of HR policy in international holdings. Disadvantages and advantages of the personal union in such groups of enterprises are presented from the perspective of their specificity which arises from the phenomenon of multiculturalism. An analysis of the personal union and supervisory boards as factors strengthening personal ties in international capital groups was conducted. The results of research on the effects of activities performed by expats who were seconded to work in management boards of subsidiaries of international holdings operating in Poland are presented here. The personal union is also evaluated as a tool of selecting candidates for key management and specialist positions in subsidiaries within international capital groups.

References


Assessment Center characteristics means a complex multi-criterion method of assessing candidates for managing and specialist positions, used also in the process of periodical evaluation of employees representing the management and specialists staff in enterprises.


Zając, Cz., 2009. *Barriers of Cultural and organizational integration in international

Local and Global Factors in Company Management – Case Study

1. Introduction
The article presents the description of a company which is a part of a global organization. The company operates on the Polish market and produces goods distributed worldwide. Two terms were used in the company’s description as keywords – organizational climate and organizational personality. Therefore, the result obtained is a sort of a psychological portrayal with the personality of a leader in the forefront; its background consists of cultural elements, defined by the international character of the company. The general manager, while characterizing the company he manages, described it as “…an example of a global company, managed according to local, in this case Polish, conditions.”

The presented study illustrates the ways in which the management staff reconciles elements arising from international aspects of the company with the characteristics of the Polish market. The psychological research perspective assumed by the author emphasizes factors which had significant influence on the method of solving the dilemma incurred in the question: how to reconcile what is local with what is brought into organization by the owner or presenting culturally different domain? Applying this approach results in an additional factor coming to light. This factor is the personality of the leader, a crucial person in the organization, the leader who decides about the methods of resolving potential conflicts at the point where the local meets the global – global meaning developed by a foreign owner and the management supervision located outside the country where the analyzed entity operates.
2. Management dilemmas in companies with international range

In the face of globalization processes the researches dealing with the mutual adaptation of elements, which represent two entities with different cultural backgrounds, are becoming more and more useful and indispensable. Majority of publications in literature deals with problems and difficulties which arise in terms of managing international companies, however the ways of solving such problems are analyzed more rarely [Bass 1990; Bartlett, Ghoshal 1992; Deresky 2000; Smith, Petersom 1998]. Usually, what is described is a culturally homogeneous company, which starts to function at the meeting point of various cultures - its own well known culture and the new one, generally at the beginning treated as strange, sometimes with the predominance of a positive attitude due to curiosity and hope for better future; yet in most cases hostility occurs, or at least reluctant attitude, which arises when the unknown is treated as strange, transforming quickly into hostility towards the unknown.

The research on cultural differences conducted by G. Hofstede brought a new understanding of management problems in companies operating on worldwide markets. Three dimensions indicated on the basis of an international research, namely Power Distance, Individualism, and Tolerance of Uncertainty, became useful categories that allow to understand better problems arising in multicultural companies, particularly if these cultures are significantly distant not only geographically but also in terms of their worldview. In this context we can distinguish the special meaning of terms organizational culture and organizational climate. Quite considerable interest in these issues among business world representatives is due to Peters and Waterman work In Search of Excellence [1982].

Researchers agree on the idea that the culture influences various characteristics of an organization, including climate, individual attitudes to work and organizational behaviours. Kopelman, Brief and Guzzo [1990] described culture as a factor which forms politics and operational practices of the management staff, which determines the influence on organizational climate, which in turn influences work attitude and organizational behaviour.

Terms like organizational culture and organizational climate have been used and analyzed in studies for several decades, thus their contribution to understanding how organizations function raises no doubts and is commonly acknowledged.

Both culture and climate are considered to be particularly useful in explaining how organizations influence behaviour, attitudes and wellbeing of organization's members. Moreover, culture and climate can be considered as basis for understanding why some organizations are more innovative, easily adopt new technologies and more quickly than others adjust to changes, although it seems that they are equipped with exact the same assets and operate in the same environmental conditions.
Usually researches dealing with the issues of organizational culture and climate are viewed independently. One of the first projects related to the research on mutual relations between these two categories was Schneider’s study *Organizational Climate and Culture* [1990]. In researches where those two issues were studied simultaneously in the same organization, it is hard to find enough empirical data, which would allow to state with certainty whether both terms are interchangeable or entirely different effects, characterizing independent aspects of functioning of an organization [Johnson, McIntyre 1998; Kirsh 2000; Glisson, James 2002]. A similar problem appeared while realizing research described in this paper.

3. Meaning of psychological factors

The starting point for the author’s own research was a report showing that stable and relatively permanent psychological attributes of the key organization members are dominated by factors characterizing the way in which an organization functions: individualistic, neurotic or mature [Kets de Vries, Miller 1982; Miller, Kets de Vries, Toulouse 1982; Mahler, Pine, Bergman 1975; Kernberg 1976].

Many authors emphasize that strategy, structure and organizational culture remain under equal and strong influence of the personality of top management representatives [see: Kernberg 1979; Kets de Vries 1980; Stapley 1996; Bridges 2000]. Kets de Vries and Miller [Kets de Vries, Miller 1984; 1986] point out that members of top management work out and represent beliefs, conceptions and attitudes towards matters crucial for the company which are common for the whole organization. Such concepts are reflected on all levels of organization by means of such psychological mechanisms as identification, projection, but especially by the phenomenon of transference. Not only the top management but also other key people in the organization significantly influence the formation of predominant adaptive behaviour occurring in the whole organization, constituting a kind of a “germ” of predominant mechanisms of adaptation in the whole company. Moreover, the mutual influence of organizational orientations and management disposition is reciprocal. According to Kets de Vries and Miller [1986], mutual causation is the rule.

It can be assumed that hidden mechanisms come out from the bottom of organizational behaviours, determining thoughts, beliefs, behaviour, attitudes and also ways of dealing with difficult situations presented by the organization members. Organizational personality, from the author’s point of view, can be understood as internal mechanisms regulating behaviours of organization members arising at the meeting point of their interpersonal relations, submitted to the influence of norms and values; goals, missions and visions of the organization. Functions of personality consist of developing ways of behaviour proper for the goals of organization; of creating and transferring a
system of common beliefs, judgments, assessments and conceptions into the whole organization; and of lowering the level of fear and aggression through the usage of defence mechanisms, also worked out in the whole organization under the influence of its key people. Those mechanisms cause unification of behavior patterns of organization members, the result of which can be described as “organizational personality” [Barabasz 2008].

In accordance with the assumption which is a base to the presented research, if power in an organization is widely spread throughout the whole company (centralized organization), its culture and strategies will be determined by many managers, and then neurotic mechanisms inhered in the personality of one key person will be diminished by the influence of several other members of the management staff. Thanks to that, the correlation between neurotic functioning style and potential organizational pathology becomes weaker. Since top management members have usually stronger influence on the organization, they were the main object in the research, a part of which is presented in this paper.

4. Case study – company X

The presented company, further called X, is a manufacturing enterprise being a part of the worldwide corporation with the headquarters in the USA, subordinated to the board on the European level. The mother-company was established on the American market at the beginning of 20th century. In 1980s it started expansion to international markets, which resulted in the extension of product range and economical position enhancement. In the middle of 1990s American corporation became a part of a huge European company, leading on the market of products produced by the American company. Currently this company employs 35 thousand people in 20 countries. The Polish branch employed approximately 300 people in the time when the research was conducted, at the moment there are 400 employees. Manufacturing entities and sales and distribution centres are also spread throughout Europe and employ the total of 3000 people. The European head office is based in Belgium. Assuming that the global company is the one the operation of which crosses not only boarders but also geographical and time zones [Lovelock, Yip 1996, p. 65], the company covered in this research, being a part of internationally spread organization, meets the above mentioned criteria.

Vital elements characterizing the company from the research point of view are these embedded in the organizational culture of the company. These elements are expressed by goals and values effective in the company, captivated in the form of “the diamond of business”. The diamond of business consists of 6 elements: Value Creation, Customer Satisfaction, Citizenship, Growth, People Development, Market Leadership (based on company’s internal documentation).
Company X launched manufacturing activity in Poland in 2001. At the starting point of the research, in February 2007, the company employed around 240 employees in manufacturing positions and 50 employees in administration. The company’s management estimate that around 50% of currently employed have been working in this company since the very beginning of its operation. Considering the age of the employees – young people are in majority. All the employees and members of the management are Poles. They are subordinated to the general manager, who has managed the company since it started operation on the Polish market, moreover, he is also a member of the board on the European level. Management staff representatives of particular entities in Europe have regular contact with their co-workers in the same counterpart position in other branches of the corporation. The contact with the central board of directors in the headquarters in Denver (USA) is quite rare and definitely can be considered as occasional. The Polish branch has in its structure the Research and Development department which, according to plans, is currently intensively developed, which makes employees proud and satisfied.

5. **Procedure and research tools**

Research presented in this article was conducted as a part of a larger research project dedicated to verifying the idea of the organizational personality. The characteristic was developed on the basis of studies conducted between February and May 2007, with the usage of two questionnaires analyzing the organizational climate, W. Bridges’ personality questionnaire (OCI) and on the basis of conversations conducted with company's management staff. The results were gathered basing on quantitative qualitative analysis of the data gained from 77 employees, among whom 11 employees were management staff representatives, so effectively 30% of the whole staff took part in the study. The questionnaires were completed by all management staff representatives, the general manager included, and also the majority of employees from the administration and operations (maintenance, logistics and warehouse) departments. If it comes to the manufacturing department, correctly completed questionnaires were received from only 26 employees.

After conducting preliminary conversations, the research was conducted in two phases. The first stage was a questionnaire study using the tools analyzing organizational climate (D. Kolba questionnaire and standardized in the Polish studies W. J. Paluchowski questionnaire) and W. Bridges questionnaire analyzing organizational personality OCI (*The Organizational Character Index*), which was completed by all the research participants. The management staff representatives were also examined by means of two additional personality tests. One was the MBTI questionnaire (*Myers-Briggs Type Indicator*), compatible with questionnaire analyzing organizational personality (OCI), the second test was the personality test defined by E. Mittenecker and W. Toman.
The organizational personality questionnaire OCI (The Organizational Character Index), defined by W. Bridges and used in the study, is based on four opposing dimensions which K. Briggs and I. Myers separated according to the personality concept defined by C.G. Jung, and created MBTI (Myers-Briggs Type Indicator) questionnaire, which resulted in describing 16 types of personality [Bridges 2000, pp. 13–31].

In both questionnaires analysis is performed basing on the following dimensions:

- **E – Extravertion – I - Introversion**, that is organizational orientation, interest orientation, source of energy. This dimension explains whether organization on the primary level is directed externally at the market, competition and rivalry (E), or is directed internally – at its own technology, culture, realization of leaders needs (I).

- **Sensing – S – Intuition – N**, this dimension reflects methods of gathering information; refers to what is essential in the organization, how the reality is perceived. It shows whether organization focuses mostly on the present, on details, on current situation (S) or on the future, on planning, on defining potential existing in given situation (N).

- **Thinking – T – Feeling – F**, this dimension refers to the method of compiling information, evaluating situation, decision making. It shows whether the organization operates impersonally, makes decision based on such priorities as logic, competency, efficiency (T); or whether it operates on the basis of personal choices dependent on such values as individualism, common good, creativity (F).

- **Judging – J – Perceiving – P**, this dimension explains whether the organization has a tendency to get involved in the external world. Judging organizations tend to use Thinking or Feeling, which are the Judging functions, to deal with their outer world, while perceiving organizations use Sensing or Intuition, the so-called Perceiving functions, in dealing with their outer world. An organization with the predominance of evaluation (Thinking dimension and cognitive functions) prefers definite decisions, clear defining of businesses and explicit definition of tasks realization criteria. An organization with the predominance of observation (preference for Feeling and Intuition dimensions) seeks for a larger number of data, lets the business run its own course, prefers procrastinating when making decisions and choices.

The questionnaire concerning organizational climate, which was used in the study and defined by W. J. Paluchowski [1998], allows to extract information about such aspects of organization’s functioning as superior—subordinates relations, tolerating risk and conflicts, sense of solitude, access to information, identification with the work team, punitive competition, general attitude to organization. The second questionnaire analyzing organizational climate consists of six-degree scale which reflects following dimensions: responsibility, requirement, rewards, self-organization, warmth and efficient management.
Personality test of E. Mittenecker and W. Toman allows to evaluate the personality, adaptation capabilities, moreover indicates the direction of development and the character of potential dysfunctions of analyzed participants.

The second stage of the study is a semi-structured interview, focused on such issues as the perception of external and internal surrounding, relations with the corporation board, conflicts and methods of solving problems, identification of threats and methods of coping with them, defensive mechanisms used in difficult situations, attitude to changes, communication. The interviews were conducted individually, and also recorded with each participant’s approval. The average length of an interview was 60 minutes (yet there were interviews lasting 40 minutes and 150 minutes).

6. Results of research

The results obtained within all subject areas distinguished in W. J. Paluchowski’s questionnaire do not differ from the average values, starting with the evaluation of superior–subordinates relation, through the access to information, and ending up with the identification with the work team (Table 1). The result slightly lower than the average was received in the area of risk and conflicts tolerance, which might lead to the conclusion that the atmosphere in the company is perceived by employees as disapproving of conflicts and risky decisions. Additionally, the area described as the general attitude to an organization was evaluated slightly lower than the average, although the result does not exceed the standard deviation range. The data acquired from the questionnaire do not explain the causes of such a situation, although this can be done by evoking to the type of personality of the researched company.

Table 1. Results of organizational climate questionnaire by W.J. Paluchowski

<table>
<thead>
<tr>
<th>Area</th>
<th>Standard deviation</th>
<th>Norm</th>
<th>Min result</th>
<th>Max result</th>
<th>Result in company X</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive relation superior–subordinates</td>
<td>9,10</td>
<td>39,56</td>
<td>12</td>
<td>60</td>
<td>39,37</td>
</tr>
<tr>
<td>Risks and conflicts tolerance</td>
<td>3,57</td>
<td>15,12</td>
<td>5</td>
<td>25</td>
<td>12,78</td>
</tr>
<tr>
<td>Sense of loneliness</td>
<td>2,45</td>
<td>13,17</td>
<td>4</td>
<td>20</td>
<td>12,45</td>
</tr>
<tr>
<td>Access to information</td>
<td>3,26</td>
<td>20,55</td>
<td>7</td>
<td>30</td>
<td>20,68</td>
</tr>
<tr>
<td>Identification with the team</td>
<td>3,96</td>
<td>21,23</td>
<td>6</td>
<td>30</td>
<td>21,20</td>
</tr>
<tr>
<td>Punitive competition</td>
<td>1,25</td>
<td>6,98</td>
<td>2</td>
<td>10</td>
<td>6,87</td>
</tr>
<tr>
<td>General attitude to organization</td>
<td>7,03</td>
<td>30,20</td>
<td>10</td>
<td>87</td>
<td>26,52</td>
</tr>
</tbody>
</table>

Source: own findings.
Furthermore, the results of the organizational climate questionnaire according to D. Kolb oscillate around the average values, although it seems significantly important that the questionnaire concerning organizational climate was completed only by blue collar workers. They evaluated the remuneration system in the company relatively low (Table 2).

**Table 2. Organizational climate (according to D. Kolb)**

<table>
<thead>
<tr>
<th>Area</th>
<th>Mean indicator value on the scale 1-10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>5.92</td>
</tr>
<tr>
<td>Requirements</td>
<td>5.97</td>
</tr>
<tr>
<td>Rewards</td>
<td>4.37</td>
</tr>
<tr>
<td>Organization</td>
<td>5.76</td>
</tr>
<tr>
<td>Warmth and endorsement</td>
<td>5.89</td>
</tr>
<tr>
<td>Managing</td>
<td>5.39</td>
</tr>
</tbody>
</table>

Source: own findings.

Table 3 presents the results of MBTI questionnaire, which diagnoses types of personality among managers and the type of personality of analyzed organization, established on the basis of OCI. The next table reflects the way the personality of a company is perceived by employees in four various areas of operation, i.e. management staff representatives, employees working in departments supporting manufacturing (logistics, traffic management and warehouse), manufacturing workers, human resources and materials development employees.

**Table 3. Type of personality of Company X and key persons (management staff representatives)**

<table>
<thead>
<tr>
<th>Analyzed object</th>
<th>Type of personality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company X</td>
<td>ESTJ</td>
</tr>
<tr>
<td>General Manager</td>
<td>ISTJ</td>
</tr>
<tr>
<td>Key person 1 - P</td>
<td>E/I NTJ</td>
</tr>
<tr>
<td>Key person 2 - P</td>
<td>ENTJ</td>
</tr>
<tr>
<td>Key person 3 - P</td>
<td>E/I NTP</td>
</tr>
<tr>
<td>Key person 4 - WP</td>
<td>ENTJ</td>
</tr>
<tr>
<td>Key person 5 - WP</td>
<td>ISTJ</td>
</tr>
<tr>
<td>Key person 6 - WP</td>
<td>INTJ</td>
</tr>
<tr>
<td>Key person 7 - R</td>
<td>ESTJ</td>
</tr>
<tr>
<td>Key person 8 - HR</td>
<td>ENTJ</td>
</tr>
</tbody>
</table>

Caption: P – manufacturing, WP – manufacturing support, R – material development, HR – human resources

Source: own findings.
The combination of results in table 4 shows that employees working in the three of separated areas of the analyzed company, are agreeable in terms of perception of their company, and they characterize its personality as type E-S-T-J. In addition to that, only the employees working strictly in manufacturing perceive the company in a slightly different way.

**Table 4.** Type of company’s personality viewed by employees of particular functional areas

<table>
<thead>
<tr>
<th>Analyzed subject/ area of the company</th>
<th>OCI result</th>
<th>Type of personality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>E-I</td>
<td>S-N</td>
</tr>
<tr>
<td>Company X as a whole</td>
<td>20,27</td>
<td>21,45</td>
</tr>
<tr>
<td>Management staff</td>
<td>20,10</td>
<td>21,60</td>
</tr>
<tr>
<td>Manufacturing support- WP</td>
<td>19,93</td>
<td>21,73</td>
</tr>
<tr>
<td>Manufacturing- P</td>
<td>19,33</td>
<td>22,63</td>
</tr>
<tr>
<td>HR + R</td>
<td>20,83</td>
<td>18,17</td>
</tr>
</tbody>
</table>

* Particular columns contain average values of results, achieved by employees in particular areas of examined company, regarding following dimensions: Extraversion – Introversion, Sensing – Intuition, Thinking – Feeling, Perceiving- Judging

Caption: P – manufacturing, WP – manufacturing support, R – material development, HR – human resources

Source: own findings.

According to indications of manufacturing workers, the Company X is an E-N-T-J/P type of personality; therefore, it differs from the indications of other employees in terms of two dimensions. First one, that is S – N (Sensing – Intuition), applies to the method of orientation in the reality; whereas the second one is an attitude towards reality, realized either by observation and information gathering (P – Perceiving), or continuous (constant) analysis of reality and its evaluation (J – Judging). The reasons for this discrepancy can be explained by the personality analysis of managers responsible for the area of manufacturing. Each manager, including a technical director, is characterized by a predominance of N (Intuition) indicator in the individual type of personality. This is the way the company is perceived by manufacturing workers. The predominance of N indicator (intuitive cognition) occurred also in case of two managers from the area of manufacturing support. Other managers, in terms of the personality dimension, represent methods of functioning based on information which can be verified by senses (Sensing). In the P – J dimension (Perceiving – Judging) manufacturing workers evaluated their company as the one which is in balance between the attitude based on observation and information gathering, and the attitude providing constant analysis and evaluation in that matter. In this
dimension only one of the leaders in manufacturing area (“Key person 3-P”) was distinguished by an observing attitude. A noticeable intensification of this dimension occurred in the results of organizational personality questionnaire (OCI) only among manufacturing workers.

The examined company quite eagerly expose itself to administrative operations and operational interactions. Just after entering the company it is easy to notice clearly assigned boundaries between various areas, even though at first glance one can have an impression that there is an open space with no barriers. The general manager, when asked about the general vision of his company, says:

“I would like to work with people, who know what they are doing, so I could only correct situations requiring my intervention; I could live as a pensioner who just enjoys spending time at work”.

About relations with the American owners and their influence on the functioning of the Polish branch:

“What is very important in the American culture is the auto-presentation and auto-promotion of results. I manage to do it in a good way, but there are managers who have not enough auto-promotion skills; maybe it is also my fault... There were some people in this company with great potential in this field, but as soon as they learned something, they would leave the company to search for new challenges...”.

The managers who took part in the research expressed the following opinions about influences and pressures from the European head-office:

Key person 4 (WP): “…In the corporation we are just one small part. I feel like a small local company, totally separate. I am in contact with other external companies (which are the part of the corporation), but I don’t feel any pressure. And neither do manufacturing workers, I think. We do what we have got to do, and that’s it....”

According to another manager (Key person 2 – P): “...we are a Polish company, with our own, Polish way of operation. The European or worldwide character of the company can be noticed only in procedures. I have to admit that procedures are helpful in many cases, so this procedural aspect is important, although sometimes very time consuming...”

When it comes to a conflict between people having significantly different points of views, it can be observed that they are striving for a common standpoint. Working out a common standpoint might be improved by regular meetings run with various groups of employees and with various frequencies; namely, among others, daily, weekly and monthly meetings of particular managers, conferences of managers from different cooperating departments, meetings of managers with employees responsible for completing specific tasks, and regular meeting of managers with subordinates working on a given shift (in manufacturing area). It is easy to observe that there is a division of responsibilities and pressure on adhering procedures, which should be coherent.
One of the managers from manufacturing support states his opinion about communication: “In terms of communication there is always room for improvement. However, there are more problems on the level of individual contacts, than on the level of solutions applied in the whole company. People sometimes just do not want to meet half way...During daily meetings we talk through all the problems. At the end of the meeting the director decides who should do what.”

What is neglected in the company, from the perspective of the manufacturing workers, is the flow of information - why they should do what they were told to do. At the same time, they believe that there is space for criticism, sometimes even sharp conversations, which are treated as an element of a decision making process. Strict abiding by applied norms, standards and rules of behaviour is very important in the company, which derives from the manufacturing regimes, established not only on the local board level, but also on the level of the whole corporation board. In terms of personality type E-S-T-J, it is acceptable to do everything, however on condition, that it will be consistent with the set procedures and applicable standards. Complying with the established regulations is obligatory not only because of the requirements of manufacturing quality system, but also due to the safety of employees. During the research, the slogan: “As many days with no accident as possible” caused a lot of emotions among not only manufacturing workers but others as well.

Risky decisions are rarely taken in the researched company. There are a few reasons for that; among these the manufacturing character of company as well as a formal position in the corporate structure, which quite strongly imposes the choice of particular solutions, are relevant. Moreover, the I-S-T-J personality type of a general manager is a quite significant factor. The manager with such personality attributes is precise, pragmatic, steady, well organized, dutiful and at the same time decisive and realistic. These qualities are very important, especially in unforeseen situations that happen in almost every company. The ability to deal with such situations effectively depends on the competency and abilities of company's managers.

The attitude towards changes is important in every company. A company with the proved personality type does not change quickly, rapid changes are not welcome, however, if a change happens all employees are actively engaged in the change process. The general manager of the company states: “...The power of a company is its stability... What is specific to our company is that we make an effort to operate in a good and honest manner. No significant change can be successfully implemented in the company without involving its top management. Otherwise changes always face the lack of enthusiasm. Then, after some, time change disappears. It has happened here before... Resistance towards changes derives from the belief that a change is an additional responsibility, and there is the lack of belief that the change can improve the situation. So people make
an assumption that the change is a nuisance, not help. Moreover, the majority of people can be characterized as naturally passive... There is a significant lack of managers on various levels. They are in the company, but there are not enough of them. In addition to that, there are wide needs in terms of strong dynamics of the environment. We make many attempts to introduce changes, some are successful, some are not. The organization went through various stages of transformation – from a patriarchal company to the Stock Corporation, from hierarchical to matrix... At the moment, we undertake fewer initiatives, but the majority of undertaken ones are successful, although people do not understand that what is happening is a process, not an incidental event... The employees tend to treat the task as an action, not an element of a process... Nonetheless changes arise on various levels, in various departments of the company. Although they are mostly evolutionary changes, we can also notice revolutionary changes and these are dependent on groups of people... and there are definitely fewer of them”.

The company with personality type E-S-T-J has usually difficulty with accepting changes, because the idea of a change is somewhat directed against its attributes and values, that is against stability, persistency, constancy and predictability. People who fit this type of company very well are realists, who respect predictable reality, do not trust emotions and sudden spurts and feel well in explicit and clearly hierarchized structure. Additionally, what is most important for them is keeping given promises, which is quite well aligned with the way of acting and values of company’s general manager.

Manufacturing workers perceive the company as effective in realization specific operations, characterized more as temporary and operational than long-term and strategic. When there are troubles in the company, as soon as the nature of problem is defined, quick action is taken, even if not all elements of the situation are taken under consideration. Sometimes, even if there are premises indicating that the source of problem lies elsewhere, previous assumptions are still realized, which is often a reason for frustration and the decrease of effectiveness.

In terms of management functions, it is worth remembering that an extroversive (E) – sensing (S) organization responds with strong resistance towards planned changes, especially if employees do not understand their significance and meaning for the whole company. Development plans of the company related with launching a new department (research and development) are a perspective for the appearance of a new unit the specific character of which might stand out in the current structure, plans, procedures and, consequently, the strains might occur between particular departments and the leaders. Therefore, the CEO might be required to take actions in order to ensure that the new department has leeway in functioning and to protect it from the excessive formalization.
7. Final conclusions

The presented case of Company X seems to reveal primarily the necessity of making an effort to create new, common culture, and this should be provided by top management representatives who will speak on behalf of different cultures. However, the described case shows explicitly how significantly meaningful and influential for the company is the personality of executive managing the company. Therefore, it can be initially assumed that neither automatic reception of what comes from the outside, nor exorbitant and excessive adherence to what is local (meaning “ours”) lead to optimal solutions; because the most important factor is the personality of key persons and their influence on adjusting mechanisms underlying the system of organization's functioning.

Despite the fact that, at this stage, it is not explicitly explained how the psychological mechanism, determined by the personality of particular executives, influences the whole organization, still the number of data is sufficient to state that the influence exists [Miller, Kets de Vries, Toulouse 1982]. The relations between variables studied on the unitary level and variables effecting the whole organization (such as the climate, organizational culture and organizational personality) require application of statistical studies. This would allow to evaluate the relation between variables operating on various levels of the organization's functioning. The presented results of the qualitative research provide input into further research including statistical relations between individual variables, and variables occurring throughout the company as the whole.

Abstract

This article presents a psychological portrayal of a company presented in terms of organizational personality and organizational climate. The assumed psychological research perspective emphasizes factors which significantly influenced the approach to problems concerning a company being part of an international corporation. The important factor in the following case study turned out to be the personality of a general manager in a Polish branch of an international corporation. The article was composed on the basis of empirical research concerning organizational personality.

References:


The Methodology of Implementation of Kaizen in Selected Polish Industrial Plants

I. Introduction to Kaizen

Word KAIZEN comes from Japanese words KAI (change) and ZEN (good). Kaizen is the most important conception of Japanese management and the key of Japanese companies success. It means improvement in every level of the company [Masaaki 2007].

Masaaki Imai explains Kaizen as: “The essence of Kaizen is simple and straightforward: Kaizen means improvement involving everyone, including both managers and workers. The Kaizen philosophy assumes that our way of life - be it our working life, our social life, or our home life, deserves to be constantly improved.” [Masaaki 2008]

The reason for this sustained success is that everybody in the company, starting from top management down to the workers, is committed. Masaaki Imai advise that Kaizen, when applied under firm top management commitment, can be turned into a corporate strategy to make an organization far more competitive and profitable, given today’s global business environment [Masaaki 2008].

When we think about Kaizen, we think about the company as the institution with problems. Nowadays managers try very often to implement complicated tools and technologies to solve companies’ problems, but in fact it would be much easier to solve by using simple and low costs methods [Masaaki 2006].

In the management context Kaizen has three main roles: creativeness, maintenance and improvement of management standards. Maintenance is understood as having current level of technology, management and operational
standards, and acting according to proper standard operational procedures [Masaaki 2006].

Most ways of improvement, which manager consider to implement in the companies, are expensive and connected with high technology. In contrary Kaizen emphasis human resources, trainings, communication, team work, engagement and self-discipline – it is approach based on common sense and low cost.

Kaizen supports process thinking. The futures of Kaizen thinking have been explained on figure 1.1.

**Figure 1.1 Kaizen Management System**

![Kaizen Management System Diagram]

Source: Training materials "Kaizen Basic", Kaizen Institute 6

Kaizen Management System - that is comprehensive program to implement Kaizen philosophy aimed at long-term efficiency improvements in all areas of business activities. There are plenty of improvement and rationalization methods. To reach long-term success, you have to consider all factors which could influence the situation. Kaizen Management System concentrates on all
areas which make up the company. Those factors are: quality, costs, logistic, team motivation, safety, technology and environment. The whole process – starting by supplier through internal customer till final customer is taking into consideration [Training materials "Kaizen Basic" 2009].

It means that the company should never be enough satisfied with its improvements. In every company workers prefer the current situation and are against the changes, that is why it is so important to show them the benefits of changes. Kaizen philosophy means management involvement, without managers support improvements will never be successful.

To summarize it is important to remember, that in Kaizen philosophy:

1. Quality is in the first place
2. It is very important to act, basing on the data
3. Each process is the customer of previous one
4. Without MANAGERS involvement acting according the Kaizen philosophy will never work out.

But if Kaizen has so many advantages, why there is a resistance to Kaizen implementation in polish companies? Why employees do not want this improvements?

Why the manager who are looking for savings do not give expected support for the implementation process? Why does it happen very often that after the first phase of companies stop it’s next stages of implementation? Is it the fault of philosophy or the wrong way of implementation? Is it possible to avoid this problems?

Next part of the paper will show the methodology of implementation Kaizen in polish companies, its validation and main application barriers. It shows the way for successful implementation.

II. Implementation of Kaizen in polish companies.

Traditional methodology of implementing Kaizen begins with 5 S. The main goals of 5 S is the establishment and maintenance of order and discipline in the workplace. Practices of 5 S are one of fundamentals of creating the work environment which stimulates pro quality acting, harmonious work and continuous improvement of human relations, what changes into the effectiveness of the organization.

How does the 5 S work?

There are 5 steps on which 5 S practices bases:

1. Seri – Selection - is the separation and removal of all tools, instructions, materials, which are unnecessary in the workplace from those, which are necessary
2. Seiton – Systematic - is to label parts, tools, and to design a place for them where they will be available
3. Seiso – Cleaning – is cleaning, drafting, remove waste products, renovation of the workplace and its environment.

4. Seiketsu – Standardization - continuous maintenance of order, cleanliness and neatness in the workplace and its environment

5. Shitsuke – Self-discipline – is to form the habit to respect those principles.

In polish companies conditions this traditional approach to the implementation very often does not bring expected results, moreover it generates barriers, which has a great influence on companies and they often resign from the Kaizen application.

There are such reasons of this situation:

1. Managers point of view:
   • separation of workers from their duties to devote time for training, workshops and practical implementation of the 5 S
   • very long period of waiting for the results because of the fact that 5S is based on changing worker’s way of thinking, habits and hierarchy of acting by workers and managers.

Typical hierarchy of acting is:
   • reduction of delay of delivery time for the customer – so manufacture, manufacture and manufacture
   • “extinguish” occurring “fires” as soon as possible - remove the distortions

According to such way of thinking it does not surprise that it is hard to find time for systematic, cleaning, and self – discipline, so the most important elements of 5S. The is one more problem in 5 S implementation – quantification of its implementation results.

It is hard to show the numerical results of it, for example:
   • cost reduction
   • reducing downtime

2. Workers point of view – adverse events:
   • possibility of reduction in earnings, if their wage depends on production of defined number of units in a given time
   • necessity of devoting additional time for trainings and pilot implementation
   • discourage for the participation in the long process, which does not give clear, easy to define results
   • luck of incentive and help from the managers during the process of implementation

Both workers and managers very rarely give real reasons of their resistance for 5 S. The most common answer negating of project goals are:
   • it is not compatible with the specific of the company
• the company has currently very important customer order, what unable setting up the implementation
• there is an order in the company, so there is no reason for implementing 5S or moreover Kaizen itself

Those answers are the most common one, when the idea of traditional implementation of Kaizen is the idea chosen by the board and the managers, and workers try to convince the board of the company that they are wrong. Such arguments are used mostly during the meeting of the workers and managers with external consultant. And it happens this way:
1. The board makes a decision about implementing Kaizen
2. Board asks the external consultant for a help by the implementation process
3. The is a meeting of external consultant with workers, managers and Board
4. Workers use very often the arguments which were mentioned above, they signalize their resistance for Kaizen implementation , especially for 5 S
5. Consultants are usually asked to convince workers about project goals.

To convince employees and managers to purposefulness of the Kaizen implementation it is necessary to start implementation with more effective “marketing” tool than 5 S. Such tool should provide:
1. Elimination of important ineffectiveness in production process
2. Short training time and pilot implementation time (counted in days)
3. Gaining relevant result, which will be easy to quantify.

Such method in the polish companies condition is commonly SMED (Single Minute Exchange of Dies). Authors describe one, chosen example of implementation. Chosen example can be perceived as the typical one, because such method of implementation is commonly used in Poland by authors [Bednarek 2007].

III. SMED Implementation – beginning of the Kaizen implementation

Publications on the topic of changeovers time and its reduction differ not only in ideas for improvements to achieve best results, but also in the terminology. Many authors used incoherent meaning of changeover, and its scope. That is why there are some questions:
• If changeover ends on the activities related to exchanges of jigs and tools and calibration of the machine?
• If changeover also includes all the operations needed to start stable production - after an appropriate setting machines and made a batch of trial workpieces?

There exist a need of defining what the changeover is:
Changeover means a process between ending the production of one product till
beginning of the production of the second one, so until it has met all production and quality requirements [McIntosh et al. 1996] The whole changeover time is show on the figure 3.1 and is equal to the sum of setting time and start up time.

**Figure 3.1. Components of changeover**

![Diagram showing components of changeover](image)


For the project implementation the authors have chosen the furniture producer, one of the few which have in 2009 full load meaning production on 3 shifts. There were 2 main goals for the project defined:
1. The theory of SMED was presented to the participants as a basic tool to reduce the changeovers time
2. Proving during the workshop the basic assumptions of SMED through the launching of its pilot implementation in selected production cells

Preparation of the project consist of:
1. Selection of 3 workplaces (machine tools), in which pilot implementation of SMED took place
2. Choice of group of people who has participate in one-day theoretical SMED training
• managers of various levels and departments (production, logistics, tool, production setting)
• machine operators selected from all shifts

3. Choice of group of people who has participate in two pilot implementations (5 people for one workplace – 3 groups) Duration – 4 days
• machine operators
• managers at various levels and departments (production, transportation, tool, production setting)

Project was conducted according to the following sequence of events:

1. Observation and analysis of typical changeover
2. First improvement of changeover procedure
   • division of changeover time between the internal and external activities
   • preparation of the list of tools which will be used during changeover
3. Pilot implementation in the same workplaces (machine tools)
   3.1. Pilot implementation nr 1 - the operator realizes changeover according to the first version of implementation procedure
   3.2. Observation of workplaces (9 different types of changeovers):
      • Timing
      • Video recording
4. Second analysis of the collected data – increase of the time external activities, decrease of the time internal activities
5. Presentation of analysis results
6. Second improvement changeover procedure (for 9 cases separately)
7. Second pilot implementation in the same workplaces
   7.1. Pilot implementation nr 2 - the operator realizes changeover according to the second version of improvement of procedure
   7.2. Observation of workplaces (n 9 different changeovers)
      • Timing
      • Video recording
8. Analysis of the collected data – possible improvements in the second improvement of changeover
9. Presentation of analysis results. Acceptation of the final version of changeover procedure.

 Obtained results:
 Five – day project brought following results:
1. As an indicator of the correctness of the methodology the total changeover time was chosen (Figure 3.1)
2. As a result the time of changeover was reduced
3. After first pilot implementation the time of changeover has been reduced to the range between 27% - 62% depending on machine tools in relation to the changeover without application of the SMED methodology
4. After second pilot implementation the time of changeover has been reduced to the range between 13.6% - 30% depending on machine tools in relation to the changeover after first pilot implementation

How did it influence the opinion of managers and operators about implementation of SMED and Kaizen tools?

The benefits achieved during the workshops:

Developmental:
1. Engagement of workers and management in activities which eliminate loses during changeover
2. Possibility of independent implementation of SMED methodology in other areas
3. Better understanding of changeover process by the operators who has taken part in the workshops
4. Conviction of employees about the necessity of continuation of implementation of Kaizen through 5 S implementation

Consciousness:
1. Increase in awareness and knowledge of workers about the methodology of changeover time reduction
2. Engagement of employees in Kaizen activities, working out routines and habits of Kaizen
3. Understanding the types of loses and the methodology of SMED

Technical:
1. Possibility of changeover time reduction
2. Improvement in changeover process
3. Better use of machine working time

IV. Conclusions

Kaizen philosophy and tools are well known all over the world, and it is considered as one of the best way of continuous improvement, but we have to remember that during implementation in chosen country and organizational culture we should consider:
1. That it is not always compatible in each organizational culture. It has been developed in Japan, where the organizational culture is different than in Europe.
2. The implementation, according to Japanese way, can cause the resistance of employees in other countries.

3. It is necessary to adopt the way of implementation of Kaizen according to the organizational culture in local industry.

Abstract

The paper presents the results of the validation of the methodology of Kaizen implementation. The methodology has been designed for polish selected industrial plants, in order to validate the methodology the following elements have been developed:

- Selection of a representative manufacturing plant.
- Steps for Kaizen methodology implementation.
- Training required for managers and operative employees in the company
- Definition of the indicators for measurement of the results of the implementation
- Validation of the methodology through its implementation in a workshop conditions in the industrial plant.
- Adjustment and continuous improvement required in the methodology.

The findings of this research are the following:

1. Validation of the methodology in real conditions
2. Improving changes and adjustments in the methodology according to the observations through the process of validation
3. Several indicators of the industrial plant performance improvement

References


Training materials Kaizen Basic, Kaizen Institute Poland, Warsaw 2009.
1. Culture and tourist products – a double bind

Today the claim that culture is an inherent constituent of tourist products (cf. the definition of a tourist product, for example, by Middleton, 1996:89) is a commonplace statement. However, this fact does not make it a much less difficult challenge to make it a success on a global tourist market. Let me also stress that the challenge is even doubled because of a double presence of culture in tourist products. Firstly, a cultural dimension of a tourist product refers to the mother culture of the potential target customer who, while making his/her market decisions which tourist products to acquire, is strongly conditioned by its various manifestations, and more specifically by his/her culture-specific habits, knowledge, tastes, behaviours, ways of socializing and relating to people and of spending free time as well as experience of dealing with a stranger. Briefly speaking, his/her acquisition decisions are strongly influenced by his/her culture-bound expectations which, even subconsciously, s/he seeks to be met by the product. Secondly, culture, but this time the target culture built into a tourist product and understood as national, regional or ethnic culture which positively differentiates it from all other products on the market, should be also taken into consideration. As in the case of mother culture, target culture also embraces its material and non-material aspects, all of which stem from a given system of values. In most cases some tension, hopefully creative, results from a juxtaposition of the double aspect of culture present in a tourist product. When positively explored and treated as a product added value it can become its great market chance and its asset, but when approached without intercultural sensitivity, knowledge and understanding, a main reason of its failure.
An invented tradition seems to be a possible, although far from ideal, solution to the problem. The term was invented by Hosbawn and Ranger [2008] and it refers to a compromise between an authentic culture of a given ethnic group and its simplified and “civilized” version which is free from any drastic, unpleasant and difficult components hard to accept by users of other, usually western cultures. It treats culture as a pleasant and intellectually unchallenging, impoverished and uncomplicated collage, a colourful and attractive patchwork which, on the one hand, offers some new emotional experience but, on the other, does not make its participant get out of his/her stereotype-based perceptions. Thus invented tradition, which uses original rites and practices to invent their new, mass tourist-friendly versions, allows to experience him/her – because a mass tourist is its typical receiver - a new, in most cases exotic culture without the need to change almost anything neither in his/her system of values nor his/her identity make up. In a way it is a superficial, one-dimensional and shallow way of experiencing a culture without getting its deeper understanding and seeing its complex richness and diversity. Its main feature – its distinct otherness – which constitutes its true value has been blurred to avoid any difficulties and inner conflicts in its intellectual, emotional and somatic perception.

Invented traditions can be seen as one more piece of evidence of importance of culture in a tourist product. A far more straightforward and powerful message about its role in not only marketing but also branding places, has been formulated by Simon Anholt [2003, 2007, pp. 24–26], an international expert, a kind of a guru in the field. In his city brand hexagon model which can be also successfully applied to any other tourist product, culture plays a crucial role in every of its six components: presence, place, people, pre-requisites, pulse and potential. It serves as their common denominator, an element which goes across all of them and determines their proper performance. In “presence”, it is stressed a contribution of every place to a global dimension of science, culture and governance. People’s perception of pleasantness of a place and attractiveness of its buildings and parks, which characterises the second component “place”, is also greatly dependent on culture. It gives them their unique and special value and is a source of positive or negative emotional responses of the visitors. The same is true about the third and the fourth constituents, “pre-requisites” and “people”, respectively. In the first case culture is understood as an important determinant of the basic qualities and standards of public amenities and in the second it is manifested through the easiness with which foreigners can fit into a new community and share its language and culture. As for the fifth and the sixth elements, “pulse” and “potential”, also culture constitutes their basic feature. “Pulse” stands for interesting things a place possesses which can be discovered by a newcomer and which contribute to its perception as exciting. Needless to say, most of them belong to various manifestations of culture, from
folk and traditional, through elite to popular and alternative. As for the last category of “potential”, it embraces economic and educational opportunities which are embedded in the place and stand for its economic and symbolic that is cultural, capital. A mass tourist, whose visit is usually too short to make him/her fully appreciate this aspect of the place, will be probably interested in respective institutions, buildings and monuments which belong to business and educational culture and have been created in time. The stock exchange in Chicago, Jagiellonian University in Krakow, Italian “La Scala” or the Library of the University of Salamanca with its unique collection of Inquisition books, to name only a few from their long list, are all both favourite tourist destinations and highly valued brand tourist products.

The value of Anholt’s city brand hexagon model lies not only in its showing a many facets of culture in it but also in allowing for their creative exploration to change a tourist product into a brand name and to make it thus become competitive on the ever growing global market. It thus helps to meet the challenge faced by every tour operator of how to satisfy the culture-specific expectations of his/her potential customer. A double culture-specific bind – mother vs. target culture – accounts for the fact that today very few if any tourist products can be addressed to anonymous and thus perfectly global customers. Most offers have to be tailored to the specific needs of the targeted segment of clients as it is the only chance to make them interested in the product.

2. Global changes in the mass tourist market

The hospitality business seems to operate on a tourist market defined by two contradictory factors. On the one hand, it is a global market reaching global customers and addressing mass tourists, but on the other, we observe its growing segmentation and atomization. The second aspect results from both an appearance of new customers with a distinctively different cultural background and consequently their strongly differentiated needs, and a growing number of tourist agencies and tour operators. The latter, in order to enhance their competitiveness, tend to offer products corresponding to the culture-specific profiles of their potential global/glocal customers. How to successfully combine these two apparently clashing demands is a difficult task.

As already mentioned, one of significant factors demanding for new, more flexible ways of doing business by the hospitality scheme people are an enlarged number of tourist destinations and an appearance of new groups of tourists mainly in Europe and in North America. Firstly, exotic countries, e.g. Brazil, Kenya, Thailand, the United Arab Emirates have become rather easily accessible to most Europeans, especially from the former communist countries. Secondly, big groups of tourists from economically successful Asian countries, which from mainly tourist receiving countries have started sending their own tourists abroad, come to visit Europe. Apart from Japan which has been present
in the European tourist market since the seventies of the 20\textsuperscript{th} century when the programme “Ten millions”\textsuperscript{1} was put in practice [“Jen na wakacjach”, 2003, p. 32], China and South Korea are newcomers. A new emerging pattern of tourist destinations serves as a good example of the operating changes and challenges for the hospitality business people.

In Europe the challenge is especially big for the former communist countries for at least two reasons. Firstly, unlike Western European countries whose cultural heritage has been recognized by Asian tourists and which consequently have already become their destinations, Central and Eastern Europe has to promote itself and encourage tourists to visit its countries which have a lot to offer. To show how difficult the task is let me stress that the Japanese tour operators, for example, expect that the tours of Poland offer more attractions than similar tours of top Western European countries such as Italy, France and Switzerland. Thus a Polish package tour programme should include, apart from a visit in Warsaw, Kraków, Wieliczka and Żelazowa Wola (where Frederic Chopin was born) and in other places from the UNESCO list, also some thematic visits allowing the tourist to get to know Polish folk culture, popular music, etc. to make their stay special and worth remembering. [Odagiri 2005].

Secondly, in many cases hospitality business in the post-communist countries is not only faced with similar difficulties as in Western Europe in the sense that it has to create culturally adequate products for their new customers, but they also have to adapt their infrastructure and performance to world quality standards. In many cases tourist facilities have to be built from the scratch because the quality of many hotels and other tourist amenities inherited from the previous epoch does not meet modern standards. It is also necessary to improve the service and make it strive towards excellence and tourist satisfaction. Despite operating changes which are deep and decisive by national standards, international evaluation criteria are not always met.

The necessary changes are deep and costly but they are worth the efforts as Asian tourists are considered to be very attractive. They are also a hope for the European hospitality business people who believe that the new group of tourists will substantially help them to be successful in the future.

3. Polish presence on Asian tourist markets

Poland has undertaken an ambitious attempt to establish itself on the emerging Asian tourist markets. Japan has been ranked as the first target market among ten secondary tourist non-European markets followed by China and Korea [\textit{Plan Działania POT 2009}] although as it is shown by the statistics, in 2007 the number

\textsuperscript{1} The national programme “Ten millions” served to encourage the Japanese to travel overseas after the difficult period after WWII when travels were forbidden and all the efforts and means were to be used to build the position of Japan in the world of business and economy.
of Korean tourist visiting Poland was bigger than the Japanese ones. However, in the period 1999–2007 in both cases it could be observed a steady growth of the number of tourists while the number of American tourists declined in the same period of time [www.intur.com.pl].

The reasons why Japan has got a priority in promotional efforts are at least twofold. Firstly, although the Japanese keep visiting Poland, the growth of their number is much less dynamic than of the Koreans. Thus it is necessary to strengthen their motivation and to show Poland as an attractive alternative, a country which is able to meet their expectations and offer more than the European countries of their traditional destinations. Secondly, the Japanese tend to make their travel decisions using the suggestions from their relatives and friends, especially those ones who have been to Poland or have got some information participating in various events promoting it. The value of the information is clearly shown by the results of the TNS OBOP polls in 2005 according to which 67% of the respondents were not tempted by a trip to Poland only because either they did not know anything about our country or they saw it as economically underprivileged, backward, distant and unknown [www.malopolskie.pl]. It should be also added that the history of the Polish-Japanese tourist relations is longer than in the case of Korea, which demands a revitalization of the picture of Poland and its becoming free from the existing stereotypes.

The above task is one of the basic preoccupations of the Institute of Polish Brand which stresses the fact that the picture of Poland in the world is still mainly created by its history, traditional culture and culture-specific events (Kraków and Warsaw) as well as such great Poles as John Paul II and the legend of the Solidarity movement – Lech Wałęsa. For the Japanese, Chopin and his music constitute an additional strong emotional link with Poland. One more element on the list of Polish associations is Auschwitz, a scar on Polish history and a painful wound which is still difficult to heal. Japanese tourists treat a visit to Auschwitz as a sad duty and an obligation. Its picture marks Poland in such a powerful way that it is for the Japanese a gloomy and depressing country with a tragic history, concentration camps, war, misery [Kubiszyn-Puka 2010]. What is missing from such a rather one-sided picture of Poland is its vision as a modern country, dynamic and culturally diversified, with beautiful nature, unspoiled and intact, a country proud of its hospitable people and of its past but also building its prosperous future. As in the slogan by Willy Ollins: Poland. Creative tensions [Analiza wyników badań wizerunku Polski... 2008, pp. 55–56] – it should use to its best its geographic location between the West and the East synergically exploring two different cultural and religious traditions as well as bridging them and serving as a cultural mediator between two Europes.

Such a picture is being conveyed, for example, to the Chinese whose tourists are seriously considered as a new and numerous segment of customers for the Polish tourist market. According to the research, the knowledge about Poland...
of an average Chinese is very poor, nearly non-existent, which, to some extent, facilitates the task. The cognitive gap allows the creation of a fresh picture of Poland, without any prior positive or negative associations, which can more truly correspond to the self-picture of Poles. The last (2010) EXPO exhibition in Shanghai provided an excellent opportunity for the first serious campaign promoting Poland in China. Its main idea was to use culture-specific concepts shared by both Poland and China to start interest in our country and by showing that geographical distance does not always imply a cultural gap create a common platform for a dialogue. The idea turned out to be a great success – Poland became more familiar and easier to understand. Moreover, the Polish pavilion got the main prize for its architecture and appearance and Poland was awarded the Best Promotion of the Country Award in the category 2010 CBN Marketing Awards for Expo 2010 Shanghai China [http://www.expo2010.com.pl/#/pl/news/e11e8f090ed8302b3650539702b2a17e].

Three motives were used to shorten the cultural distance between Poland and China. The material used to build the Polish pavilion looked like paper, which recalled the old Chinese tradition of paper making. Its walls, however, were not plain but richly decorated with floral motives taken from the Polish paper cuttings from the region of Łowicz. They are well know in Poland and they represent traditional folk art, which allowed to show, in a natural way, Polish folk art to the Chinese visitors. The walls played one more function: they were like pages of a book where important events from Polish history were narrated by the Krakow Dragon. The animal belongs to the two cultures although its symbolism is very different. In Chinese culture it stands for happiness, prosperity and all other positive features while the Krakow Dragon immortalized in the legend of a smart shoemaker and a beautiful princess is an evil monster devouring the most beautiful girls from the city and its neighbourhood. A wedding ceremony between a Chinese girl wearing a traditional Polish folk costume from Krakow and a Pole dressed in a typical Chinese outfit was used to symbolically seal the relationships between the two countries. The married couple was to live in an apartment in a housing estate built on the territory of EXPO.

Once more, culture played a crucial role in the success of the Polish marketing campaign and resulted in an authentic interest of the Chinese in Poland.

3. A cultural profile of Japanese tourists – the impact of mother culture
As follows from the research carried out on behalf of travel Web site Expedia among people from the hospitality business (15,000 respondents) in twelve European countries in 2006, Japanese tourists, for example, are very attractive customers in the sense that they usually spend more money on their holidays and are bigger shoppers than an average European. Their often excessive shopping has both economic and cultural roots. European prices of luxury goods are lower than in Japan and as far as the cultural motivation is concerned, it is related
to a tradition of *omiage* and *senbetsu*. The first term stands for an obligation to buy a gift for family members, friends and co-workers while on holidays and the second one refers to a sum of money offered to the traveller by his/her family and friends before his/her journey which should be reciprocated with *omiage* [“Jen na wakacjach” 2003, p. 31], “The best tourists in the world are...”]. Japanese tourists are demanding, they look for high standards of service and tourist amenities but at the same time they are generous with tips. It is interesting to notice that they appreciate very much even insignificant and inexpensive gifts from the hotel staff as a token of esteem paid to them. Moreover, they are very polite, respectful towards others, especially the elderly, open to new experiences and curious to see new places. They appreciate the culture they visit and they show a sheer interest in it. They are also very quiet and clean although their cleaning rituals may sometimes cause problems to the hotel owners. They expect to have in their bathroom both a shower and a bathtub. The first serves to proper washing and the second for a ritual relaxation, which means that the Japanese take their bath only after having taken a shower.

The Japanese, generally speaking, do not grumble and do not show emotions, especially the negative ones even when a problem appears. Then they would try to find a solution to it rather than look for the person to be blamed for it [Bugaj 2007, p. 49]. As they usually have only short holidays they want to visit as much as they can. If they travel on their own, they are usually well prepared and they know what they exactly want to visit, which means that they look for specific kind of information.

The choice of a holiday destination by Japanese tourists depends, to a large extent, on three other factors. Safety is very highly valued by them and is given priority on the list of their expectations. The ability to communicate in English is also very important for them. Finally, as the distance between Japan and Europe is rather big, at first they will consider the countries which can be directly reached by plane. (Poland is planning to start direct flights to Japan in 2012. Moreover, since 2001 Polish visas have not been necessary for the Japanese tourists, which should encourage them to visit Poland [Licznerski 2003, p. 52]. They also tend to visit a different country each time abroad choosing various directions depending on the thematic aspect of the trip. Europe, especially France, Austria, Spain, Italy, Germany and Switzerland are valued for their culture and history, especially the places and monuments which are on the UNESCO list. They are also impressed by wild nature, colourful autumn trees, green plains and open spaces, which they lack in Japan, a mountainous country with a very high density of population [Halasa 2006, Kubiszyn-Puka 2010, Kaczmarek, Stasiak, Włodarczyk 2005, p. 4]. New York, San Francisco and Hawaii in the USA, France and Italy in Europe as well as Singapore and Hong Kong in Asia are their favourite shopping destinations [www.pot.gov.pl]. It can be also observed their growing interest in Central and Eastern European countries as well as their Asian neighbour
countries, China, South Korea and Thailand. The latter preference is related to the world economic crises and the exchange rate of yen [Bugaj 2007, p. 53; Walas 2008]. Western Europe and North America have become rather expensive destinations, especially considering the fact students and retired persons have become quite mobile lately. The Japanese tourist pattern has been adopted by most Asian tourists.

Some behaviour of the Japanese tourists may cause misunderstandings or even serious problems if they miss a proper cultural interpretation which usually uses one of the following key-concepts: enryo, wa, amae, on and seishin [Bugaj 2007, p. 57]. Enryo is an interesting combination of ceremony, ritual, respect, self-effacement by means of refraining from directly expressed wishes and opinion, especially if the latter oppose general opinions. It also stands for a distance in relationships with elderly people and superiors. Wa relates to enryo as it implies harmony in a group, a kind of groupism understood as a group solidarity and anti-individualism as well as a tendency to avoid any open conflict. Amae, in turn, which roughly speaking can be translated as a need to be loved and accepted, can be observed mainly in the behaviour of young Japanese girls. They let others influence their decisions and accept the relationships similar to the ones between a mother and her child. Seishin can be understood as a strong character with such qualities as discipline, perseverance, loyalty and an “army spirit” which help attain self-perfection and mastery. On, which originates from a Samurai ethics, results from social relationships and stands for obligation to pay back any favour, small or big [Benedict 2003, p. 123].

Summing up, a cultural dimension of personal satisfaction of Japanese tourists rooted in their mother culture can be achieved if they are shown a non-imposing hospitality and respect tailored to their respective social position and age. Relationships, often reduced to ritual and ceremony, should be harmonious, polite, based on authority-related hierarchy. Some special attention should be paid to face preservation which is manifested in the case of young women as a strong need for acceptance.

4. A cultural profile of a Polish tourist product created for the Japanese tourist market

A more consistent promotion of Poland in Japan started as late as in 2004 when thanks to joint efforts of the Polish Embassy in Tokyo, the Polish Tourist Organisation and the Club Tourism International Inc. co-operating with the Kinki Nippon Tourist Co. Ltd., a Polish Centre of Tourist Information was open in Tokyo [Regulamin Polskiego Ośrodka Informacji Turystycznej w Tokio 2007, p. 3]. Before Poland was promoted together with other countries from the Visegrad group (the Czech Republic, Hungary and Slovakia) using the slogan “A European Quartet – one melody” [www.serwisturystyczny.pap.pl]. In 2005 the EXPO exhibition in Aichi became a good opportunity to present Poland to
the Japanese. The leitmotiv was the slogan “See the beauty of Nature” and the topic of all the events was “The wisdom of Nature”. Both of them referred to the Japanese sensitivity to natural beauty and its various manifestations. The shape of the Polish pavilion and its design which was to present a variety of Polish landscapes – from the Tatra Mountains to the Baltic coast - as well as the materials used for it – steel frames filled with wicker - illustrated the concept. It also presented Poland as a country where people live in harmony with nature and combine modernity with tradition and natural beauty. Moreover, for Polish people, nature is a rich source of inspiration and creativity in a civilisational perspective.

A study tour to Poland for JATA (Japan Association for Travel Agents) representatives organized in 2010 resulted in a month of promotion of Poland in the Nagoya region in the trains and on train stations. Traditional features of Polish cultural landscape combined with its natural beauty dominated in it [www.pot.gov.pl]. Thus, the main challenge for the Polish marketers and copywriters is to communicate successfully all the strong and multiple aspects of Poland to the potential visitors and to help them discover its rich cultural variety inherited from the past and also dynamically created today. Following the research by the Instytut Marki Polskiej (Institute of Polish Brand), Poland has already been perceived as a brand product although a little bit blurred and vague as it is not univocally associated with one distinct product [Walas 2008, p. 42]. Moreover, the Japanese tourists, for example, cannot identify a typical Polish souvenir, which would also strengthen the image of Poland. Amber, regional craft, food, vodka and mead as well as duvet, which they enumerate [www.malopolskie.pl], are either representative of particular Polish regions or even Baltic countries (amber). Such a situation needs more consistent efforts to highlight seven categories of typically Polish subproducts creating a complex and easily recognized image of Poland. They are the following:

1. vitality – Poland a country of young people, full of energy and enthusiasm, looking to the future rather than to the past
2. culture – both cultural heritage and its modern manifestations
3. physical beauty – rich, unspoilt nature, variety of landscapes,
4. people – hospitable, imaginative and creative, “Slavonic soul”, beautiful women
5. health – nature, ecology, freshness, natural ecological products
6. cities – monuments, architecture, history, individual narration, soul, multiculturalism
7. famous Poles – John-Paul II, Copernicus, Canaletto, Saint Adalbert, Witt Stwosz [Analiza wyników badań wizerunku... 2008]
Although culture has been treated as a distinct category in the above list, it is also present in all of them. Its varied manifestations are either their background or an important, sometimes even dominating constituent.

A tourist product for the Japanese should creatively use their already existing positive associations (top of minds), minimalise or even eliminate the negative ones and properly explore these elements which are important for Polish national identity and character. The first group of assets embrace beautiful nature, historical and cultural monuments, good traditional cuisine, famous people – Chopin (24% of all responses), Marie Skłodowska-Curie, John-Paul II, Wałęsa and also Andrzej Wajda who received a very prestigious award for his life achievements from the Japanese Emperor and thanks to whose perseverance a Museum of Japanese Culture and Technology was put up in Krakow (it is the only such a museum in the whole of Central and Eastern Europe). They also highly value Polish family life, ability to combine successfully private and professional life, friendliness, interpersonal relations, co-operation and equal rights of men and women. Development, patriotism, tradition and religiosity belong to other positive opinions. Cold weather, greyness, dullness, tragic national history and poverty together with relatively low prices because Poland is not in the Eurozone, constitute their negative counterparts [www.malopolska.pl].

Considering the list of positive and negative evaluations as well as expectations, the core of Polish tourist product should not be changed: Warsaw and Żelazowa Wola, Krakow with Wieliczka and Auschwitz are a tourist must. As for other attractions, Polish tour operators should consider to show the third important Polish city. They should also explore the cultural potential of middle-size and small cities with their slow pace of life, tiny streets winding around charming market squares, rich and varied architecture, many pieces of which deserve attention. Polish manor houses together with their parks and gardens serve as the best introduction to Polish noble culture which is the source of Polish cultural ethos. The wooden architecture of orthodox and catholic churches, wind- or watermills, some of which are on the UNESCO list or the Trail of Traditional Craft, both in the South of Poland – the Podkarpacie region – can constitute an interesting thematic tour which will clearly distinguish Poland from other European countries. The experience would be even more interesting if the visit could be combined with some folk traditions the visitors could directly experience, e.g. one-day workshops introducing different aspects of Polish folk culture, such as, for example, dancing, bread baking, Easter egg decorating, Easter palms making, paper cuttings, crochet, regional embroideries, pierogi making, traditional liqueur making, paper flower making, wicker etc.

As follows from the respondents’ answers they would appreciate very much a chance to actively experience Polish culture outside big centres and well known regions. Polish multiculturalism of the Eastern borderlands where Orthodox religion has been for centuries co-existing with the Roman Catholic Church and
even Islam offers an excellent opportunity to discover the Poland which is even little known for the Poles themselves. This part of Poland has always played an important role in the Polish tradition of tolerance and fight for national freedom. It was a cradle of patriotism, and in the past a land of Mickiewicz and Miłosz, two poets who have earned a place in the Pantheon of Polish culture.

Taking into consideration the Japanese sensitivity and fascinations, the tourist product should also explore open spaces, green plains and unspoilt, wild landscapes as well as national parks, forests and recreational areas which are the green Poland. The Dunajec River gorges and Zakopane are classics but the Lake District in the Mazuria region together with Roztocze in the South-East of Poland and the Baltic coast are still waiting for being discovered. The Białowieża Forest, the Solski Forest, especially its Janowski Landscape Park on the Biłgoraj Plain would be a nice escape from the city and also a chance to show a less well known but not less interesting face of Poland.

People are a great asset of Poland, which should be considered while creating tourist products. It is true that language, especially in the case of Japanese tourists is a big obstacle, but on the other hand, even some rudimentary English can be useful to facilitate direct contacts, eg. during folk art workshops, various life events, visits in ethnographic open air museums. The Japanese value hospitality very highly, and Poland is well known for it. Making it a significant part of the experience of Poland is a value added. It communicates respect for the visitor and thoughtfulness, which, considering the role of buzz marketing in Japan, will pay back in a growing number of visitors to Poland.

The Polish tourist product should be tailored to individual needs and interests of each group of tourists and possess a soul, which is possible if the tour operators learn to look at Poland with “new eyes”. The ability to meet the challenge allows them to discover, first for themselves and than for the tourist the Poland which will be both a familiar and fresh experience. Its familiarity will stem from the tour allowing the potential tourist to have met their expectations resulting from their mother culture. Its fresh aspect, in turn, will derive from the image of Poland being free from cultural stereotypes and thus more authentic, convincing, fuller and interesting, created by imaginative and sensitive people who are proud of sharing their highlights of their culture with foreign visitors.

Abstract

Contrary to its logics, a global tourist market demands a continual modifications and segmentation of tourist products which, although addressed to a mass tourist, should be tailored to his/her individual and mother/target culture-specific needs and expectations. Consequently, culture plays an important role in the process and it should be approached from two different but complementary perspectives. First of all, the mother culture of the potential customer as well as the target culture of the receiving country should be considered. The first one accounts for the decisions which products to buy and the second
one, which determines the way the hospitality business operates in terms of services and tour content, is responsible for the customer’s satisfaction from the tourist product s/he has acquired. When the respective cultures of the hospitality business people and of the tourists are similar, their influence on a market success of a tourist product is small but when they are very different, e.g. Asians vs. European cultures, they can create serious problems for both parties.

A growing importance of Asian tourists, Japanese, Chinese and Korean, on the European tourist market constitutes a challenge for hospitality business, especially in former communist countries which contrary to Western European countries not only have to establish themselves as new tourist destinations and compete with the renown ones but also to adjust their offer to the tastes of their Asian customers.

The Polish Chamber of Tourism has been involved in a campaign to market Poland for the Japanese tourists and to make it one of their favourite holiday destinations. However its efforts must be paralleled with an attempt to create a proper tourist product which will appeal to the Japanese as far as its cultural content and service culture are concerned. The present article discusses the double occurrence of culture in the Polish tourist product for the Japanese market.

References


polonia.jp, available on 5 November 2010.


Webpages:


1. Introduction
This article sets out to analyze the problem of defining the concept of organizational culture as well as models and typologies used in reference materials. Moreover, based on the quality pilot study, it strives to explain peculiarity of this concept in relation to Polish hospitals.

Organizational culture proved to be a difficult research issue, firstly due to ambiguity of the very term, but also because of the lack of effective tools which would allow to look into given organizational cultures. The problem seems to intensify in the case of such organizations as hospitals, where organizational culture is also influenced by values and professional standards of doctors and medical staff. Nonetheless, organizational culture in hospitals constitutes a significant theoretical issue, mainly due to the fact that the problem has not been conceptualized yet, and, at the same time, is of pragmatic importance, as organizational culture often establishes social norms which may hamper organizational changes.

2. Definitions of Organizational Culture
Reference materials provide several dozen various definitions of organizational culture. All of them may be divided according to three paradigms. Exemplary analysis is presented in the Table 1 below.
<table>
<thead>
<tr>
<th>Author</th>
<th>Definitions of Organizational Culture</th>
<th>Paradigm</th>
</tr>
</thead>
<tbody>
<tr>
<td>E. Jacques</td>
<td>Habitual or traditional manner of thinking and acting, to some extent shared by members of an organization and at least partially accepted by employees.</td>
<td>functionalist-structuralist</td>
</tr>
<tr>
<td>E. Schein</td>
<td>The paradigm of shared and fundamental assumptions created by a given group when solving the issues of environmental adaptation and internal integration. The paradigm may be deemed conventional. New members of organization must accept it as a proper method of solving organizational problems.</td>
<td>functionalist-structuralist</td>
</tr>
<tr>
<td>H. Schenplein</td>
<td>Values, norms and beliefs that are commonly accepted in organization as a part of the entire system.</td>
<td>functionalist-structuralist</td>
</tr>
<tr>
<td>G. Hofstede</td>
<td>“mind programming” directed at organization members, constitutes a set of values, norms and organizational rules effectively inculcated into the group [Hofstede 2000, pp. 38–41].</td>
<td>interpretative-symbolic</td>
</tr>
<tr>
<td>P.M. Blau</td>
<td>specific, unwritten ”game rules” in social organization allowing participants of the social life to properly understand organization and identify with it.</td>
<td>interpretative-symbolic</td>
</tr>
<tr>
<td>L. Smircich</td>
<td>Networks of meanings created by people in the course of organizational process [Smirich 1983].</td>
<td>interpretative-symbolic</td>
</tr>
<tr>
<td>R. Deshapande, R. Parasurman</td>
<td>Unwritten, usually subconsciously perceived rules filling the gap between unwritten area and situation actually taking place in the organization [Deshapande, Parasurman 2004].</td>
<td>interpretative-symbolic</td>
</tr>
<tr>
<td>J.M. Kobi, H. Wüthrich</td>
<td>Organizations not only have culture, but also constitute culture themselves [Kobi, H. Wüthrich 1991, p. 29].</td>
<td>interpretative-symbolic</td>
</tr>
</tbody>
</table>

Source: own study.
Definitions of organizational culture are so dispersed due to difficulties in creating coherent research programs and case studies. Organizational culture becomes too capacious and too difficult to be operationalized. Researchers dealing with cultural studies rarely take advantage of their colleagues’ contributions while the research output is not compiled as it should be [Sułkowski 2008].

3. Culture, identity and the image of the hospital

Even though the definitions of organizational culture and identity are similar, making a precise distinction between them seems purposeful. Strategor distinguishes culture from identity, placing culture at the level of the symbolic sphere (ideas, values, norms, beliefs, myths) whereas organizational identity is at the level of individual interpretation of that space – an internal image (fantasy, passion, complexes) [Strategor 1997, p. 503]. The above refers to the psycho-social understanding of identity. M.J. Hatch and M. Schultz distinguish between culture, identity and organizational image, simultaneously indicating their co-dependence. “Organizational identity is neither fully conditioned by culture nor results from an organizational image, it is rather created by the co-dependence of those two spheres” [Hatch, Schultz 2000, pp. 24–25].

Figure 1. The dynamics of organizational culture

![Diagram of organizational culture dynamics](image)

Identity **expresses** understanding of culture

Identity **reflects** an image of others

Culture

Identity

Image

Identity **takes root** in organizational culture

Identity expressed **makes** an impression on others

The co-dependence of organizational culture, identity and image is reflected in four processes which take place between those spheres. Firstly the point is to reflect the very images of the organization created by others within its identity. Secondly we observe the process of identity being instilled in organizational culture. Identity leaves a mark on the shape of values, norms and organizational culture patterns; it must be embedded in culture. The above leads to the expression of organizational culture through identity, identity, in turn impresses others by means of an image. The whole model has a feedback nature [Hatch, Schultz 2004, p. 379].

4. Models of Organizational Culture

Distinguishing organizational culture models and typologies from general models of organizations or its selected areas seems to be the basic cognitive problem. Since we have both theoretical and operational problems connected with separating the organizational culture from the entire organizational system, we find it difficult to describe and classify it. By distinguishing five basic organizational configurations, such as: simple structure, machine bureaucracy, professional bureaucracy, divisionalized form and adhocracy, H. Mintzberg, in fact, relates to the organizational culture, even if he focuses on the structure [Mintzberg 1983]. Ch. Perrow described types of organizational cultures by creating the matrix of technologies based on the changeability parameters and the degree of analyzability (routine, engineering, craft and non-routine) [Perrow 1967]. A sieve and human capital models are two opposite ideal types of organizational culture. A similar situation exists in the case of models of leadership, power, organizational learning or managing human resources. They depict the entire organization or its selected area and, at the same time, may be perceived as a model or typology of organizational culture. Too excessive capacity and ambiguity of organizational culture makes it impossible to analytically separate organizational culture from other areas of organization.

Reference materials provide a great number of models and typologies for organizational culture. Most often quoted concepts were created by the following researchers: E. Schein, W. Ouchi, T. Deal and A. Kennedy, T. Peters and R. Waterman, G. Hofstede and Ch. Handy [Peters, Waterman 1980, pp. 129–141]. All of them have been implicitly constructed upon the functional structuralism. While analyzing those concepts in terms of convergence, it can be observed that they are in accord as far as organizational elements of culture are concerned. Majority of authors, following the example of E. Schein, agree that organizational culture includes several of these elements: values, norms, basic assumptions, cultural patterns, language, symbols, artifacts, rituals and taboos [Schein 1992]. Models of organizational culture are, on the other hand, very diverse in terms of the proposed dimensions of values and typologies. After all, some of them were created as a result of speculations and consulting
practice rather than in the course of scientific research. T. Deal and A. Kennedy differentiate organizational culture according to the degree of risk and feedback speed. Blend of these dimensions allows to create the typology of cultures: tough guy/macho, work hard/play hard, “be your company” and process oriented [Deal, Kennedy 1988]. Concepts of Ch. Handy, W. Ouchi as well as T. Peters and R. Waterman are similarly simplistic and have not been rooted in a wider frame of scientific research. The last three concepts bear the hallmarks of good “marketing products”, since they were based on a spectacular idea and were intensively promoted as popular handbooks. Unfortunately, to achieve higher sales, it was necessary to simplify the reality. Even if they may seem witty and inspiring for managers, it would be difficult to claim that they were shaped by solid empirical foundations. The situation is different in the case of G. Hofstede’s concept which evolved from the studies of enterprises, carried out on a small scale but with the use of the sophisticated research program focused on quality and quantity. Based on the analysis of the above mentioned elements of organizational culture, six dimensions for analysis were distinguished: willingness to retain the procedures – willingness to achieve the best results; care for employees – care for production; membership – professionalism; open system – closed system; slight control – strict control and normativity – pragmatism [Hofstede, Hofstede 2007, p. 307]. Organizational culture dimensions proposed by G. Hofstede differ significantly from dimensions proposed by other authors creating models based on empirical studies. Therefore, what we experience here, is the “jungle” of models, dimensions and typologies of organizational cultures [eg. Goffee, Jones 1998].

5. The types of hospital organizational cultures

One can find numerous typologies of organizational cultures in reference books. The most popular are, e.g. the two-dimensional classifications of: Ch. Handy, T.E. Deal and A.A. Kennedy. At the initial stage of studies I suggest the application of the simplest one-dimensional dichotomic culture typologies with reference to the hospitals in Poland:

1) Weak culture – strong culture,
2) Positive culture – negative culture,
3) Conservative culture – innovative culture,
4) Hierarchical culture – egalitarian culture.

1. Weak culture – strong culture.

The organizational cultures of hospitals usually display the weak culture characteristics, frequently with two or more accompanying antagonistic subcultures. Besides internal conflicts of interests, pride related to affiliation with the company is frequently lacking, while the employees are often proud of the profession they practice. The degree of involvement and loyalty is also difficult to generalize (Table 3).
Table 3. Strong culture versus weak culture.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Strong culture</th>
<th>Weak culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree of approval of organizational values and norms.</td>
<td>Consensus as to organizational values and norms.</td>
<td>Conflict as to organizational values and norms.</td>
</tr>
<tr>
<td>Degree of formalization of norms.</td>
<td>Unwritten, generally respected norms.</td>
<td>Formalized, frequently evaded regulations.</td>
</tr>
<tr>
<td>Employee involvement in company life.</td>
<td>High degree of employee involvement.</td>
<td>Low degree of employee involvement.</td>
</tr>
<tr>
<td>Degree of employee loyalty to the company.</td>
<td>High degree of employee loyalty to the company.</td>
<td>Low degree of employee loyalty to the company.</td>
</tr>
<tr>
<td>Emotions related to being a member of the organization – pride or shame</td>
<td>Pride in affiliation with the company.</td>
<td>Being ashamed of affiliation with the company.</td>
</tr>
<tr>
<td>The employee’s emotions – feeling appreciated or humiliated.</td>
<td>The employee feels appreciated in the company.</td>
<td>Many employees feel humiliated in the company.</td>
</tr>
</tbody>
</table>

Source: authors’ study.

2. Positive culture – negative culture

The criterion of distinction between positive and negative cultures is first of all a culture’s effect on long term organizational efficiency. A positive culture should favour meeting the goals set by management, whereas a negative culture can hamper the realization of those goals. P. Bate, based on his studies, described a negative organizational culture syndrome which can be contrasted with a positive culture. We can analyze in which group our family companies could be included (Table 4) [Bate 1984].
Table 4. Negative culture versus positive culture.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Negative culture</th>
<th>Positive culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emotionality</td>
<td>Emotional coldness – the avoidance of expression and feelings.</td>
<td>Moderate or strong emotionality – sharing emotions with others.</td>
</tr>
<tr>
<td>Personalization of organizational bonds.</td>
<td>Depersonalization of interpersonal relations – high degree of formalization.</td>
<td>Personalization of relations in the organization – direct personal statements, lower degree of formalization.</td>
</tr>
<tr>
<td>Activeness of employees</td>
<td>Subordination – waiting for the superiors’ instruction in order to solve problems.</td>
<td>Activeness – tendency of employees to take independent decisions and to independently solve problems.</td>
</tr>
<tr>
<td>Approach to changes</td>
<td>Conservatism – inflexibility in new situations.</td>
<td>Flexibility – openness to changes and readiness to implement them.</td>
</tr>
<tr>
<td>Isolation</td>
<td>Concentration on individual duties, specialization.</td>
<td>Broader look at the functioning of organization, attempts at generalization.</td>
</tr>
<tr>
<td>Approach to other organizations</td>
<td>Antipathy – people appear to be adversaries rather than supporters (individualism).</td>
<td>Friendliness – people are more often supporters than adversaries (collectivism).</td>
</tr>
</tbody>
</table>

Source: authors’ study based on P. Bate, 1984.

3. Conservative culture – innovative culture.
Conservative culture is connected with the tendency to reduce uncertainty, to act with little risk involved, to try to maintain the *status quo* and stress the organization’s stabilization role. The role of tradition in the company is stressed. Different versions of activities and scenarios are of deterministic nature; risk avoidance is assumed, there is a maximum restriction of the information deficit and one version planning. Changes are mainly interpreted as a threat.

An innovative culture is change-oriented and is associated with readiness to act even when there is an information deficit; also an inclination to take risks is observed. The organizations are characterized by high tolerance of risk and they do not aspire to maintain the *status quo* and are ready to accept external changes and introduce transformations. They usually adapt better to changes in their surroundings and are flexible. They attach more importance to the openness of the organization than to its stability (Table 5).
<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Conservative culture</th>
<th>Innovative culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change-oriented</td>
<td>Oriented toward maintenance of organizational <em>status quo</em>.</td>
<td>Organizational change-oriented.</td>
</tr>
<tr>
<td>Entrepreneurship</td>
<td>Low level of entrepreneurship and innovativeness.</td>
<td>High level entrepreneurship.</td>
</tr>
<tr>
<td>Attitude to tradition</td>
<td>Respect, tradition treated as a model.</td>
<td>Distance, tradition treated as a burden.</td>
</tr>
<tr>
<td>Respect for authorities</td>
<td>High respect for experienced people in the organization.</td>
<td>The value of the authorities is questioned, “new blood” is in demand.</td>
</tr>
<tr>
<td>Approach to information</td>
<td>Tendency to act when complete information is available.</td>
<td>Approval for activities when an information deficit occurs.</td>
</tr>
</tbody>
</table>


5. Hierarchical culture – egalitarian culture.
Preference for hierarchism is related to the conviction that people differ from one another and the organization reflects this diversity. Thus the organization should include numerous executive levels and there should be diversity in the rights, privileges and benefits of various employee groups. A special significance is attached to the maintenance of discipline and strengthening of the authority of power. In hierarchical organizations a strong diversification of employees prevails. Thinking in terms of elites is preferred. The significance of discipline and order resulting from the power structure is stressed.

Striving for equality originates from the conviction that people are vested with similar rights and the organization reflects that elementary equality. Therefore an organization should possess a flat structure and maximally limit the number of management levels. Strong diversification of rights, privileges and benefits of employees is inadvisable. Equality generates the following attitudes in organizations: emphasis on the similarity of employees, preference for egalitarian thinking, orientation toward spontaneity and flexibility of structures and power relations (Table 6).

---

Table 6. Hierarchical and egalitarian cultures.

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Hierarchical culture</th>
<th>Egalitarian culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inequalities of post</td>
<td>Striving for strengthening inequalities between job posts.</td>
<td>Striving for levelling the differences between job posts.</td>
</tr>
<tr>
<td>Wage differentiation</td>
<td>Approval for large differentiation of wages at different posts.</td>
<td>Striving for the restriction of wage differentiation.</td>
</tr>
<tr>
<td>Management style</td>
<td>Autocratic.</td>
<td>Participatory.</td>
</tr>
<tr>
<td>Degree of centralization of decisions</td>
<td>Centralization of decisions.</td>
<td>Decentralization of decisions.</td>
</tr>
<tr>
<td>Origins of organizational hierarchy</td>
<td>Natural, impartial, belief that the employees at lower organizational posts are usually less capable and skilled than the higher level employees.</td>
<td>Social, conventional hierarchy is related to playing various pragmatically determined roles.</td>
</tr>
<tr>
<td>Stability of power hierarchy</td>
<td>Hierarchy should be stable.</td>
<td>Hierarchy should be flexible and undergo changes.</td>
</tr>
<tr>
<td>Dependence relations between employees</td>
<td>Subordinates depend on superiors.</td>
<td>Superiors and subordinates are interdependent.</td>
</tr>
<tr>
<td>Privileged higher level employees</td>
<td>In organization higher level employees should receive privileges.</td>
<td>In organization everybody should have equal rights.</td>
</tr>
<tr>
<td>Concept of exercising power</td>
<td>The concepts which stress the significance of superiors and management of employees prevail.</td>
<td>The concepts which stress the significance of employees and their involvement and participation in the management process prevail.</td>
</tr>
</tbody>
</table>


The analysis of the organizational cultures of the hospitals studied results in the conclusion that the hospitals are threatened with the occurrence of culture symptoms which bring about lower organizational efficiency, that is: weak, negative, conservative and hierarchical cultures.
6. Relations between Culture, Structure and Strategy

The relations between organizational culture and other areas of organization, including strategy, structure and organization setting are also unclear. Several approaches and differentiation criteria may also be indicated here.

Separation of the organizational culture from other elements of organization is the first problem. Functionalists usually opt for the possibility of theoretical and practical separation of cultural, structural and strategic areas, while interpretivists and postmodernists tend to tacitly assume, or even explicitly indicate, inseparable connection between these semantic areas [Smircich 1983, pp. 55–65].

Establishing a priority is the second issue. One has to answer the question whether organizational culture is more important, equally important or perhaps less important than other management areas. Obviously, majority of researchers dealing with cultural phenomena pronounce for superiority or at least equivalency of culture in organization management [eg. Kobi, Wüthrich 1991]. Outside the cultural mainstream, however, it would be easy to find supporters of the theory that strategy predominates over organizational culture [Eg. de Wit, Meyer 2007, p. 33].

Establishing the relation between organizational culture and the organization setting, constitutes, in my opinion, the third and the key issue. Reference materials provide a vast number of studies and analyzes devoted to the relationship between culture per se and other elements of social and economic setting [Bogalska-Martin 2007, pp. 237–256]. This abundant scientific material includes classical studies carried out by M. Weber [Weber 2002], analyses of the relationship between the culture and the wealth of nations: F. Fukuyama [2001], DS. Landes [Landem 2000], as well as multicultural comparative studies: G. Hofstede, A. Trompenaars and Ch. Hampden-Turner, R. Hous and R. Inglehart [Hofstede 1984; Hampden-Turner, Trompenaars 1998; House, Hanges Ruiz-Quintanilla 1997, pp. 215–254; Inglehart 1997]. All of these works, however, do not relate to the relationship between organizational culture and social, economic or even cultural setting. If we assume that organizational cultures are “immersed” in the cultures of given societies and constitute a different set of values, what kind of transmission is there between these areas then? Vast majority of researchers assume that the values and norms of the society diffuse into the organizational culture. Obviously, any opposite influence is also possible, even if the range is usually smaller due to the size of the community and strength with which these values and norms may become entrenched. Still, a homogenous model defining the relationship between the culture of society and organizational culture has not been created. There are no decisive solutions which would allow to determine the cohesion level between culture of a society and organizational culture. Some authors depict organizational cultures and
cultures of the societies employing completely different models and dimensions of values [Hofstede, Hofstede 2007, p. 307]. Others assume larger coherence and use the same or similar models and dimensions of values [Sułkowski 2002, p. 111].

Lack of conclusions in terms of the relationship between the organizational culture and other elements of the organizational system results in making very diverse empiric and research assumptions in this area. Theorists and managers include both enthusiasts and skeptics of using organizational culture for the purpose of organization management.

7. Methodology of the Quality Pilot Studies

Initial results included in this study cover a series of free-form interviews with managers and employees from four hospitals located in the Lodz Province in Poland. In total, 15 interviews were conducted which aimed at gathering different opinions concerning the description of: culture, norms, key social values and tensions typical of hospitals. Provided interpretations should be perceived merely as initial and quality conclusions, any generalization would require wider and more representative studies.

Interviewed managers and employees were employed in 4 hospitals in Lodz Province. Brief description is provided below:

Hospital No. 1: a public unit with over 2500 employees. This is a specialist hospital, with gynecologic, obstetric and pediatric wards, in a difficult financial condition undergoing a restructuring process. The hospital was founded by the Ministry of Health.

Hospital No. 2: a university hospital employing over 1000 people. The hospital was founded by the Medical University. This is a multi-specialist hospital with, among others, such wards as: cardiology, pneumology, diabetology, dialysis, allergology, neurology, neurosurgery, general and transplantation surgery or laryngology. The hospital remains in a good financial condition and has been developing its infrastructure and improving specialist medical equipment for many years now.

Hospital No. 3: a multi-specialist hospital employing over 500 people. The hospital was founded by the Ministry of Interior and Administration. This is a multi-specialist hospital. For the last three years, the unit has undergone a deep restructuring change which allowed to improve its financial condition. In spite of onetime debts, the hospital currently does not generate any liabilities.

Hospital No. 4: a district hospital, in 2009 was transformed into a company with 100% shares owned by the local government. Currently, the hospital employs 750 people and specializes, among others, in: surgery, internal diseases and infectious diseases. A number of medical services which are rendered is outsourced to small entities affiliated with the hospital. The hospital has undergone a deep restructuring change, which allowed to settle former debts and regain a financial balance.
8. Conclusions

Tension between the subcultures is the main conclusion in the cultural area. The strongest subcultures relying on their own values and norms and displaying the high level of self-identity, include the following professional groups: doctors, managers, nurses, other medical employees (e.g. paramedics). The dynamic social balance based on power play and clashes of cultural patterns and norms can easily be observed between those groups.

The second conclusion shows the correlation between the organizational culture of hospitals and professional cultures. Organizational culture in hospitals is created by tension between the values of professional cultures, especially cultures of doctors and nurses, and organizational culture of the hospital, that is a business entity operating on the commercial market. This clash between the two systems of values reduces effectiveness of managerial activities. Medical ethos based on the Hippocratic Oath urges medical professionals to care about health and life of the patient. This is an autotelic, basic and core value deeply rooted in the medical culture [Nawrocka 2008, pp. 66–98]. On the other hand, organizational culture of hospital managers who have to work during transformation period and strive to lower operational costs, is increasingly similar to the values and norms typical of a competitive enterprise. What predominates then, is an ongoing pursuit for costs optimization and financial surplus which would allow to expand the hospital activity. These two approaches tend to be contradictory, which is evidently reflected in the hospital organizational structure (Table 2).

Table 2. Cultural Dualism of Hospitals in Poland.

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Professional Medical Culture</th>
<th>Hospital Organizational Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key values</td>
<td>1. Providing the highest quality medical services</td>
<td>1. Lowering operational costs</td>
</tr>
<tr>
<td></td>
<td>2. Taking care for a patient</td>
<td>2. Taking care for the hospital development</td>
</tr>
<tr>
<td></td>
<td>4. Striving to cure a patient regardless the costs</td>
<td>4. Abandoning unprofitable medical services</td>
</tr>
<tr>
<td>Sense of community</td>
<td>Bonds and values of the given professional group, built upon the community</td>
<td>Communication and loyalty of the organization members, built upon collaboration</td>
</tr>
<tr>
<td>Sense of autonomy</td>
<td>1. Strong sense of community and professional autonomy</td>
<td>1. Separation from the surrounding and competitiveness</td>
</tr>
<tr>
<td></td>
<td>2. Hermetical groups of doctors and nurses</td>
<td>2. Responsibility of managers</td>
</tr>
<tr>
<td>Sense of continuity</td>
<td>Professional associations, maintaining contact with professional environment</td>
<td>Continuity of employment and hospital activity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Continuity of management</td>
</tr>
</tbody>
</table>

Source: own study.
The described dualism of organizational cultures in hospitals leads to a series of organizational consequences. Firstly, three distinct subcultures may be easily distinguished: doctors, nurses and managerial-administrative staff, which clash with one another more and more often. Hospital managers, most often doctors (as in the four analyzed hospitals), intuitively or with perfect awareness understand this tension within organizational culture perceiving it as a peculiar “split personality of managers”. Being doctors, they wish to conform with the medical ethos, but, at the same time, they are also obliged to take into account economic and managerial logic.

According to the third aspect, as it was proved by the conducted interviews, organizational culture is, above all, interconnected with organizational structure of hospitals. The strategy is perceived by managers as a formalized document which does not provide any innovative solutions since the dynamic setting demands the implementation of incremental strategies while organizational structure was often believed to be coupled with culture. For instance, culture of hospitals No. 1 and 2 was built upon bureaucratic patterns, culture of hospital No. 3 goes in line with pragmatic patterns, while culture in hospital No. 4 is an equivalent of entrepreneurial patterns.

To sum up, based on initial quality studies of organizational cultures, it can be observed that there are significant differences between culture of enterprises and culture of hospitals. Specificity of hospital cultures lies in significance of professional cultures and the peculiar tension between organizational and professional cultures. The phenomenon of hospital culture in Poland seems to be of great importance and has not been properly explored yet.

Abstract

This article sets out to analyze the issue of defining the concept of organizational culture and focuses on models and typologies used in reference materials. Moreover, based on the pilot quality study, it tries to explain peculiarity of this concept in relation to Polish hospitals.

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