



# The ambivalence of Diversity Management local reinterpretations in the Polish subsidiaries of four international companies: a multi-case study approach

Aneta Hamza-Orlinska

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**THÈSE DE DOCTORAT**  
**DE L'UNIVERSITÉ PSL**

Préparée à l'Université Paris-Dauphine

**The ambivalence of Diversity Management local  
reinterpretations in the Polish subsidiaries of four  
international companies: a multi-case study approach**

Soutenue par

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## RÉSUMÉ

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A la frontière du management de la diversité dans les contextes nationaux (Brabet et al. 2019 ; Chanlat & Özbilgin, 2017) et du transfert de gestion, l'objet de la thèse est d'examiner les enjeux culturels et organisationnels qui influencent le transfert international du management de la diversité (MD), sachant qu'il s'agit d'un concept polysémique, historiquement construit et qui fait l'objet de nombreuses contestations en Europe et au-delà. Cette recherche a non seulement pour but de contribuer à la compréhension d'un phénomène peu exploré dans un pays d'Europe de l'Est, mais également voudrait analyser et comprendre le rejet et la résistance locale aux formes classiques (i.e anglo-saxonnes) du management de diversité axées traditionnellement sur la non-discrimination, le recrutement et l'attraction de nouveaux talents à l'international. Nous nous intéressons à la réception locale et à la mise en œuvre des politiques de management dans quatre secteurs économiques différents : industrie pharmaceutique, services aux collectivités, assurances et production d'énergie. Pour illustrer ce phénomène, la thèse s'appuie sur une méthodologie qualitative et adopte une étude de cas multiple en s'appuyant sur des diverses sources de données : les entretiens approfondis, données visuelles et textuelles et la littérature grise.

## MOTS CLÉS

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Management de la diversité, transfert en management, Pologne, filiales de multinationales

## ABSTRACT

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Drawing on diversity management studies from national perspectives (Brabet et al. 2019; Chanlat & Özbilgin, 2017), this thesis aims to examine the cultural and organizational issues that influence the international transfer of Diversity Management (DM), as a polysemic and historically constructed concept. The study contributes to the understanding of the relatively unexplored phenomenon in Eastern European countries by analyzing the rejection and local resistance to classic (i.e. Anglo-Saxon) forms of DM, traditionally focused on non-discrimination, organizational recruitment and international talent attraction. The results are drawn from qualitative methodology in the four case studies, which are based in the following sectors: pharmaceutical innovation, life quality services, insurance services and energy production. The thesis employs multiple data sources: documentary data, visual data and semi-structured interviews.

## KEYWORDS

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Diversity management, management transfer, Poland, subsidiaries of multinationals

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## RESUME

*“Et si j’attaque la Forme polonaise, c’est bien parce qu’elle est ma forme à moi...et tous mes ouvrages veulent être dans un certain sens (sens certain), car ce n’est là qu’un sens de mon non-sens, une révision de l’attitude de l’homme moderne envers la forme (...)”*

*Gombrowicz (1981)*

La multiplication des échanges et l’internationalisation des économies et des marchés ouvrent, en particulier pour les filiales de multinationales, de nouvelles opportunités de développement mais aussi de nouveaux défis d’adaptation à leurs instruments de gestion (Barmeyer & Davoine, 2011 ; 2013). La mondialisation a affecté non seulement les circulations de populations issues de l’immigration, mais aussi la mobilité internationale des personnes à l’intérieur des organisations. Ces transferts des personnels, des pratiques, voire de modes de gestion se sont souvent heurtés à des obstacles, notamment quand les maisons mères ont essayé d’imposer dans des contextes nationaux bien différents leurs manières de faire et leur vision du “vivre ensemble” (Chanlat et al. 2013; Segal, 2009 ; 2014). Le management de la diversité (MD), enraciné dans le système législatif et l’histoire Anglo-Saxonne, offre parmi les outils de gestion qui voyagent d’Europe occidentale vers l’Europe de l’Est, une bonne illustration de ce phénomène. Il vise à établir un milieu professionnel divers, inclusif, dans lequel les valeurs de la diversité sont réputées et apportent une valeur ajoutée à l’organisation. Depuis son émergence récente dans les filiales Polonaises de multinationales, ce MD fait l’objet de diverses traductions managériales et génère des résistances qui sont particulièrement intéressantes à étudier. A fortiori dans le contexte d’un pays culturellement aussi homogène que la Pologne. La question se pose de savoir que deviennent des politiques diversités transférées localement par les multinationales étrangères dans leur filiales Polonaises. Nous verrons comment l’introduction du MD dans le contexte national polonais génère nombre de paradoxes et parfois même quelques absurdités.

L’objet de la thèse est d’examiner les enjeux culturels et organisationnels qui influencent ce transfert international du MD, sachant qu’il s’agit d’un concept polysémique, historiquement

construit et qui fait l'objet de nombreuses contestations en Europe et au-delà. Cette recherche a non seulement pour but de contribuer à la compréhension d'un phénomène peu exploré dans un pays d'Europe de l'Est, mais également voudrait analyser et comprendre le rejet et la résistance locale aux formes classiques (i.e Anglo-Saxonnes) du management de diversité axées traditionnellement sur la non-discrimination, le recrutement et l'attraction de nouveaux talents à l'international. Nous nous intéressons à la réception locale et à la mise en œuvre des politiques de management dans quatre secteurs économiques différents : industrie pharmaceutique, services aux collectivités, assurances et production d'énergie.

Cette thèse est basée sur la posture selon laquelle *"un chercheur doit faire des choix sur les approches, les stratégies et les méthodes qui conviennent le mieux à son propre projet de recherche"* (Vassilopoulou, 2011 p.108). Pour cette raison, la thèse introduit une nouvelle dimension de la diversité que nous proposons d'intituler "International Diversity Management" (IDM). La gestion internationale de la diversité (IDM) examine les politiques d'entreprise visant à renforcer leur attraction en promouvant la diversité des nationalités et en contrôlant les risques de discrimination tant dans l'agenda politique que dans les initiatives organisationnelles.

Nous laissons de côté délibérément d'autres dimensions classiques, telles que le genre, l'âge, le handicap, l'orientation sexuelle etc., car une compréhension approfondie de plusieurs dimensions serait une tâche trop lourde dans le contexte d'une thèse, surtout si l'on considère que chacune de ces caractéristiques introduit des dilemmes complexes ayant chacun des implications diverses pour les organisations.

Les questions d'égalité des chances, de non-discrimination et de principe de valorisation de la diversité culturelle et de l'inclusion au travail ne soulèvent pas seulement des problèmes dans les pays hétérogènes. Ceux-ci existent aussi dans les pays homogènes. D'où l'intérêt de s'intéresser à la Pologne.

Pourquoi étudier le MD en Pologne ?

*Diversity Management in Poland*

*is the art of overcoming barriers.*

*(Kozłowska-Rajewicz, 2013)*

L'histoire turbulente de la Pologne rend particulièrement nécessaire mais aussi difficile la saisie des enjeux politiques, économiques et anthropologiques associés au MD.

Tout d'abord, le management de la diversité renvoie aux questions fondamentales de l'identité nationale et de la construction d'une identité commune au sein d'Europe (Chanlat, 2017 ; Nowicki, 2017 ; 2019). Il mérite d'être étudié à la lumière du Brexit, d'un éventuel scénario de Polexit et, plus largement, de la montée du populisme en Europe et au-delà. Le passé de la Pologne est l'histoire d'un Etat qui a disparu de la carte du monde pendant cent vingt-trois ans (entre 1795 et 1918) et qui a connu une domination extérieure sur le plan linguistique, culturel, géopolitique et ethnique. Les Polonais sous occupation ont été discriminés en tant que "Polonais". Pourtant, avant 1795, la Pologne avait été capable d'accueillir et d'intégrer plusieurs identités ethniques et religieuses. Cette tradition a été brisée aux lendemains des insurrections ratées de 1830 et 1863-1864.

Aujourd'hui, la Pologne est l'un des pays les plus homogènes du monde en termes de nationalités et de croyances. Contrairement à ce que certains pensent, cela n'a pas toujours été le cas, car la Pologne a été longtemps une société multiethnique et multireligieuse, notamment aux XIV et XVI<sup>e</sup> siècles. L'imaginaire national (Nowicki, 2009) et le courant politique nationaliste trouvent leurs racines dans un débat historique irrésolu engagé entre deux visions distinctes de la Pologne : d'un côté, La Pologne sous l'héritage de Piast et, de l'autre, la Pologne de la dynastie Jagellon. L'héritage des Piast est lié à "l'essence de l'identité polonaise", l'idée d'un territoire et d'un État unifiés sur la base des ethnies, des religions, mais dans un sens "biologique" (l'appartenance par la naissance et le sang) ainsi que l'appartenance imaginaire à une seule communauté. La tradition de Jagellon est le rempart d'un héritage multiculturel de l'État polonais régi par la coalition Pologne-Lituanie, devenue une République de deux nations et une terre accueillant de nombreuses populations slaves.

L'homogénéité ethnique de la Pologne s'est nourrie des changements démographiques fondamentaux opérés durant la Seconde Guerre mondiale. La mémoire des persécutions, des déportations et de l'oppression sont présentes dans l'imaginaire national polonais (Nowicki, 2002) et dans le débat politique récent. L'idée selon laquelle la Pologne aurait mission de préserver les valeurs chrétiennes de la civilisation européenne a été l'un des thèmes clés d'un programme politique (2014-2019) d'une partie nationaliste et conservatrice PiS (Droit et Justice). Le rejet des projets européens d'accueil des réfugiés comme l'absence d'une loi garantissant la non-discrimination en matière d'emploi montrent combien le contexte institutionnel est aujourd'hui peu favorable à la promotion de la diversité en particulier en termes de nationalités.

Notre sujet impacte d'importants enjeux en terme politiques et économiques, en particulier du point de vue des enjeux organisationnels associés à la gestion de la main d'œuvre sur la marché domestique.

Le manque de la main d'œuvre constitue le troisième plus grand défi macroéconomique pour la Pologne, juste après le protectionnisme du gouvernement et les restrictions au commerce extérieur et influences extérieures. La question est de savoir si le gouvernement d'extrême droite maintiendra une position anti-immigration ou commencera à attirer discrètement des immigrants chrétiens et catholiques issus de pays de l'Europe de l'Est, en privilégiant certaines nationalités et religions ?

Contrairement aux sociétés d'immigration typiques, la Pologne est à la fois une terre d'immigration et une terre d'émigration. L'homogénéité culturelle est renforcée par le faible afflux d'immigrants (Antczak et al. 2017) au moment où l'exode généralisé des Polonais vers l'Ouest s'est amplifié depuis l'accession en l'Union Européenne en 2004. Entre les tendances démographiques négatives et le vieillissement de la population, la Pologne lutte contre la pénurie de main-d'œuvre, ce qui a d'importantes répercussions sur le marché du travail national et la croissance économique globale (Ministère de l'investissement et du développement économique, 2018). De nombreuses compétences de la population immigrée restent inexploitées, tandis que les médias polonais et internationaux affirment que le gouvernement pourrait appliquer, sans le dire, une stratégie d'attraction des talents, en particulier en Europe de l'Est. En effet, le gouvernement polonais est polarisé entre les

incitations économiques pour attirer les talents d'un côté, et la promesse politique de maintenir le pays loin d'un projet européen multiculturel et migratoire de l'autre.

Le contexte polonais est plein de paradoxes. La Pologne est aujourd'hui divisée entre l'idée d'ouverture (appartenance à l'Europe, aspiration à la mobilité internationale, opportunités liées à l'internationalisation) et l'idée de fermeture (liée à l'attachement à l'identité polonaise) (Walicki, 2002). Les questions sur le MD sont au cœur de ce débat. Le MD en Pologne est considéré comme une stratégie organisationnelle, mais aussi comme un thème de discussion portant sur "les blessures de l'histoire" (Gryszko, 2009). Le thème concerne donc autant les sciences de gestion et les sciences économiques que les sciences politiques.

## I REVUE DE LITTERATURE ET PROBLEMATISATION DE LA RECHERCHE

Notre recherche s'appuie sur l'étude de trois littératures portant respectivement sur le management de diversité, les transferts de management et, naturellement, sur le contexte Polonais. A chacune de ces littératures correspond un chapitre.

| Gestion de la diversité<br>Chanlat & Özbilgin, 2017,<br>Nishii & Özbilgin, 2007<br>Taksa & Groutsis, 2013<br>Etc.                                                                                                                            | Transferts de management<br>Approche institutionnelle (Kostova,<br>1999, etc.)<br>Approche culturelle (D'Iribarne, 2012,<br>Chevrier, 2013 ; 2015 ; Chevrier & Segal,<br>2011 ; Blanche & Dupuis, 2019), etc.                                                                                                                                                       | Le contexte Polonais<br><br>Littérature grise<br>Concept de l'identité nationale<br>(Lodzinski, 2015 ; Nowicki, 2002,<br>2008)                                                                                                                                                                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Peu de travaux interprétatifs portent sur les pays d'Europe de l'Est, notamment sur les économies en transition.</p> <p>La contextualisation sectorielle est très marginalement abordée en lien avec les études transnationale en MD.</p> | <p>La théorie institutionnelle dans le contexte de transfert entre la société mère et les filiales étrangères mettent en lumière les limites du contexte social pour le MD.</p> <p>Le management interculturel souligne l'enracinement culturel de pratiques de gestion lorsqu'elles sont transférées dans de nouveaux contextes nationaux et organisationnels.</p> | <p>La thèse reconnaît l'importance du contexte polonais, comme l'histoire nationale, l'image politique et démographique actuelle (2015-2019) de la Pologne.</p> <p>Nous nous appuyons sur la littérature grise (statistiques, rapports, etc.), ainsi que sur les études migratoires pour explorer le concept de l'imaginaire polonais et de l'identité nationale.</p> |

Figure 1 Le cadre théorique de la thèse

- Recherche sur le MD

La première partie de notre revue de littérature est consacrée au management de la diversité.

Le MD est largement étudié dans une perspective pluridisciplinaire mariant sociologie, psychologie et littérature en gestion (Jonsen et al. 2011). Il fait l'objet de diverses théories et mobilise de nombreux concepts en management. Cependant, il est possible de mettre en évidence deux grandes approches dans ce domaine : une approche universaliste ("*largement indépendant des influences culturelles et contextuelles*") et une approche particulariste ("*une approche culturelle spécifique*") (Pudelko, 2006).

#### - L'enracinement américain du MD

Plusieurs études (Kandola & Fullerton, 1998 ; Kelly & Dobbin, 1998 ; Thomas & Robbin (1996) mettent en lumière l'enracinement culturel américain du MD, qui trouve ses racines dans l'AA (Affirmative Actions) et l'Equal Opportunity Act, s'intéressant principalement à promouvoir la non-discrimination, l'équité et le recrutement de minorités ethniques. Par conséquent, le MD a été largement traité dans les recherches en GRH concernant l'attraction, le recrutement et la gestion d'une main-d'œuvre diverse et/ou la création d'un milieu de travail inclusif, regardant la diversité de la main d'œuvre employée comme un facteur de performance organisationnelle et individuelle.

Un problème largement reconnu dans la littérature est que les sièges sociaux des sociétés nord-américaines et d'Europe Occidentale tentent de mettre en œuvre les stratégies universelles de diversité dans l'ensemble des filiales, tout en créant l'illusion d'une valeur ajoutée de D&I (diversité et inclusion) partout dans le monde. Cela soulève la question de savoir ce qu'il advient d'une approche du MD nourrie de références anglo-saxonnes du MD dans un autre univers culturel ?\_Cette situation, courante aujourd'hui, conduit à "*interroger tout particulièrement les hypothèses universalistes de la littérature sur la diversité en exposant la complexité des effets des niveaux culturels et économiques sur la manière dont la diversité est interprétée et vécue dans un contexte singulier*" (Chanlat, 2017).

La question se pose, en particulier, de savoir comment la diversité est comprise et pratiquée dans les États non occidentaux, culturellement homogènes, où les enjeux associés à la promotion de la diversité ethnique et nationale sont ouvertement niés. Bien que les efforts pour promouvoir la diversité en milieu de travail puissent contribuer à l'évolution des cultures

organisationnelles et à l'intégration interculturelle, les enjeux attenants peuvent être considérés par certains soit comme un simple effet de mode, soit comme des tentatives visant à transformer délibérément des milieux jusqu'ici homogènes (Bruna, 2016).

Contrairement à ce qui s'observe dans des sociétés d'immigration, le MD est peu reconnu en Pologne. Pour autant, cette faible reconnaissance n'est pas synonyme d'une inexistence des problèmes attenants. L'homogénéité de la main-d'œuvre et plus largement celle de l'ensemble de la société peuvent, de façon à terme problématique, faire obstacle à l'emploi des travailleurs étrangers, comme c'est le cas au Japon (Özbilgin, 2005).

Pour illustrer ce phénomène, nous faisons une distinction entre les pays hétérogènes et les pays homogènes, en classant les pays en fonction de pourcentage de la population nationale dominante. Le chapitre présente un panorama des pays où le transfert de MD a émergé, notamment les pays homogènes, les pays homogènes en Europe de l'Est, les économies en transition et la catégorie la plus répandue dans la littérature en gestion, les pays culturellement hétérogènes.

Les entreprises des pays de l'EE, les pays dits ex-bloc, "rattrapent" les pays occidentaux (Wieczorek-Szymanska, 2017) d'un point de vue économique, politique et culturel. Une plus grande attention devrait être accordée aux économies en transition ou dites "émergentes", car ces pays n'ont pas été pleinement affectés par la globalisation, la promotion des standards internationaux et d'une vision extensive de la démocratie, dans laquelle s'inscrivent les valeurs promues par le MD.

- La prise en compte du secteur d'activité

L'approche proactive de la "valorisation de la diversité" (Ivancevich & Gilbert, 2000) a suscité un intérêt important affectant tous les types d'organisations quels que soient leur taille, leur activité, leur statut juridique ou les objectifs qu'elles poursuivent. Certains chercheurs suggèrent qu'ils existent des effets de la contextualisation industrielle en relation avec l'échec de DM (Fenwick, 2011), mais le secteur est souvent considéré comme un facteur d'importance secondaire. Ce chapitre se concentre principalement sur l'optique sectorielle, car la portée de la recherche permet d'identifier les activités spécifiques de l'entreprise, sans aller dans les détails de l'analyse industrielle. La revue littéraire met en lumière les secteurs suivantes :

secteur pétrolier et gazier, construction, tourisme, production, services, agriculture, pharmaceutique, télécommunication et secteur automobile, restauration.

La revue de littérature conduit à poser quatre questions :

1. Y-a-t-il des différences en matière de gestion de la diversité entre les sociétés de production et d'autres industries plus créatives ?

La recherche met en évidence une disparité en matière de gestion de la diversité dans les entreprises de production/fabrication et les services. Certains chercheurs se penchent sur la question de la diversité des genres dans l'industrie du gaz et du pétrole et soutiennent l'hypothèse que l'échec de l'approche dominante de la gestion de diversité vient du fait qu'elle couvre l'égalité des genres dans une industrie dominée par les hommes (Williams et al. 2014). D'autres chercheurs suggèrent que la gestion d'employés issus d'horizons divers peut être plus efficace dans des entreprises de services que dans des entreprises manufacturières, car selon la théorie des ressources, les employés diversifiés sont susceptibles d'avoir une connaissance culturelle des marchés dont ils sont responsables. En d'autres termes, les entreprises de services sont bien davantage impliquées dans des interactions avec des clients internationaux, tandis que les entreprises manufacturières sont prioritairement axées sur l'efficacité de leur production.

2. Les résistances à l'égard du MD, au niveau organisationnelle et individuel, sont-elles davantage perceptibles dans certains secteurs que dans d'autres ?

La littérature ne donne pas d'indications précises, mais ses bases empiriques permettent d'en dégager quelques enseignements. Le secteur automobile au Japon (Özbilgin, 2005) est une industrie relativement ancienne qui emploie principalement la main-d'œuvre nationale plutôt que d'une main-d'œuvre ethniquement diverse ("travailleurs étrangers"), ce qui explique pourquoi la gestion de la diversité dans les pratiques de recrutement s'arrête aux travailleurs nationaux ou régionaux.

3. Existe-t-il des différences entre les secteurs public et privé ?

Plusieurs études confirment cette hypothèse. Certains chercheurs ont révélé une disparité dans la mise en œuvre de la DM, en fonction de facteurs tels que la nationalité de l'entreprise, la propriété, l'ancienneté de l'organisation et de l'industrie. Il est intéressant de noter que les



initiatives en matière de DM peuvent être d'une ampleur plus limitée dans les industries stratégiques, qui sont souvent des structures publiques ayant le monopole du marché, comparativement aux industries privées attachées aux transferts des connaissances et à la défense de leur compétitivité (Cooke & Saini, 2015). La littérature polonaise sur le MD suggère que les entreprises privées sont plus enclines que les entreprises qui appartiennent à l'Etat à adopter des politiques diversité afin de respecter les obligations légales.

4. Y-a-t-il une distinction dans la perception du MD parmi les personnels RH et non-RH, et notamment entre les ouvriers (qualifiés et non-qualifiés) et les employés administratifs ?

Certaines études examinent les différences entre les perceptions du MD qu'ont les employés des RH et non-RH, les salariés fonctionnels et opérationnels. Il semble que les attitudes à l'égard de la diversité culturelle dépendent beaucoup de la nature de l'activité de l'employé.

Finalement, ce chapitre peut se conclure en introduisant le concept théorique de résistance organisationnelle à la diversité (Thomas & Plaut, 2008) qui fournit un éclairage à la fois sur la façon dont les employés peuvent se saisir des initiatives organisationnelles en matière de diversité et sur les confrontations qui peuvent se produire d'une façon ouverte ou déguisée.

D'autres chercheurs ont bien souligné que ces résistances ne peuvent être pleinement analysées sans prendre en compte les contextes culturels et institutionnels du pays d'accueil.

## Transferts de management

Cette seconde partie de notre revue de littérature est divisée en quatre grandes parties et commence par quelques définitions d'un processus de transfert pour illustrer le périmètre de recherche. Ensuite, le chapitre continue par les éléments clé d'une théorie institutionnelle et des approches culturelles de transfert avec une attention particulière attribuée aux transferts en direction des économies en transition.

Les approches contextuelles et transnationales de la MD dans différents pays, articulées autour d'une analyse multi-niveau (Chanlat & Özbilgin, 2017) prennent en compte la spécificité des contextes organisationnels et culturels des pays bénéficiaires. Les chercheurs soulignent une variété de résultats du transfert, tels que : la résistance organisationnelle ou l'hybridation de pratiques liée à leur réinterprétation et réinvention locales. Plus important encore, l'examen

de la DM au sein des organisations exige de se faire une idée du sens polysémique et complexe du concept de diversité et de la discussion controversée qui l'entoure dans différentes sociétés. Par exemple, les transferts au sein des filiales étrangères ont en effet suscité un grand intérêt dans un débat autour de la convergence vs. la divergence ou les stratégies de standardisation et de contextualisation plus largement en management (Pudelko & Harzing, 2006).

Cette section attire l'attention sur la théorie institutionnelle du transfert de Kostova et al (1991 ; 2002) qui a été largement étudiée dans la littérature de gestion (Berthon, 2001 ; Harzing & Pudelko, 2007 ; Segal, 2016). Le chapitre part de l'observation clé que l'échec d'un transfert de nouveaux outils est susceptible d'être déterminé par les pressions institutionnelles et sociales. Kostova (1991) élargit la portée du transfert pour souligner le rôle des valeurs et des croyances des employés au sein des organisations.

En revanche, le transfert interculturel au sein des organisations est dominé par deux approches : l'approche culturaliste qui s'appuie sur une étude de Hofstede (1980) et ses adaptations littéraires basées sur des données quantitatives et qualitatives massives et la seconde approche contextualisée qui montre bien la diversité des perceptions individuelles et organisationnelles dans les aires culturelles à travers l'analyse méticuleuse des observations, comportements et conversations (Segal, 2011).

Le transfert en management est encore plus intéressant à étudier en Pologne. Dans les années 90, les pays d'Europe de l'Est, y compris les Etats ex-communistes (Skuza et al. 2013 ; Obloj & Thomas, 1996) ont été confrontés aux défis interculturels de l'adoption de normes de gestion, comme la GRH, la gestion de la qualité, etc. Le processus continu d'apprentissage de la rhétorique occidentale, libérale et humaniste pour un fonctionnement efficace des entreprises polonaises sur la scène internationale n'est pas un phénomène nouveau. Actuellement, de plus en plus d'entreprises en Pologne acceptent et adaptent des stratégies et des outils modernes à une grande échelle, mais ils sont loin de répondre aux exigences des modèles occidentaux (Skuza et al. 2013).

Ces études comparatives constituent un cadre pertinent pour l'étude des phénomènes de DM en prenant en compte les dimensions spatiale et temporelle. La notion de la diversité culturelle dans le recrutement fait actuellement l'objet d'un vaste débat sociopolitique (Vassilopoulou et al. 2013). Aussi est-il nécessaire de mettre en évidence non seulement ce qui différencie les

sociétés, mais aussi ce qui sépare les communautés au sein de chaque société (D'Iribarne, 2009). Ces perspectives appellent à examiner l'histoire de la Pologne pour mieux appréhender les questions liées au management de la diversité en contexte polonais.

## Le contexte Polonais

Le concept de DM ne peut être pleinement analysé, indépendamment du contexte historique, socio-politique et démographique en Pologne. Cela conduit à s'intéresser à la construction de l'identité nationale et en particulier à celle de la mémoire collective associée aux épisodes heureux ou malheureux associés à cette identité. Projeter en Pologne les catégories fondatrices de l'approche anglo-saxonne du MD conduirait inéluctablement à une erreur de perspective et à des conclusions dénuées de pertinence.

Selon de nombreux chercheurs en management (Taksa & Groutsis, 2013 ; Chanlat, 2017 ; Vaara, 2019), le concept de diversité sous-tend une représentation historiquement construite du " rapport à l'autre" souvent négligée dans la recherche (Haas & Shimada, 2014). Cette troisième partie examine la construction historique de l'identité nationale polonaise ou le soi-disant sentiment d'appartenance à la nation polonaise et l'imaginaire national polonais (Nowicki, 2002 ; Mencwel, 2002).

Le traitement historique de l'identité nationale polonaise est inséparable de la tradition catholique et s'inscrit dans un débat historique insoluble sur le patriotisme et le pluralisme polonais, dont les fondements remontent à l'histoire de la Pologne. S'y trouvent confrontées, deux visions de la Pologne : celle de Piast et de Jagellon. Nowicki (2002, p. 548) explique comment la mentalité polonaise d'une noblesse Polonaise a été renforcée par les traditions catholiques à partir du X<sup>ème</sup> siècle. Cet enracinement religieux a permis aux Polonais de faire face aux confrontations contre les ennemis étrangers. Le mythe national du sarmatisme est le produit des tentatives de transformer une nation multiculturelle en une identité nationale ethniquement unifiée comme sous la dynastie de Piast.

Longtemps, les Polonais en Pologne ont été considérés comme des "minorités" dans leur propre pays y subissant des discriminations violentes (Mayblin & Piekut, 2014) de la part des occupants étrangers. Cette expérience historique de la discrimination s'est traduite par

diverses formes d'oppression : l'exclusion de la vie sociale et de l'éducation nationale, l'interdiction de l'usage de la langue polonaise dans les institutions publiques ou la privation des ressources de base pour vivre.

La contextualisation historique de la diversité ne peut être pleinement saisie sans tenir compte du fait que la Pologne est en période de changement et que le cadre de l'identité (Nowicki, 2000) est constamment remis en question dans un conflit sociopolitique entre internationalisation et appartenance nationale. Nowicki (2000) explique que la Pologne n'a suivi ni la voie de la France laïque, ni les aspirations multiculturelles "anglo-américaines". Dépasser la perspective étroite des idéologies nationalistes qui ont émergé depuis 2015 (Droit et Justice), pour se tourner vers le concept de "Pologne cosmopolite" (Nowicki, 2012) est un des enjeux politiques majeurs pour le pays.

L'histoire contemporaine "de la Nouvelle Pologne" (Zamoyski, 2006) s'est accompagnée d'une transition démocratique remarquable, passant d'un marché contrôlé par l'État à un marché libre qui tire parti de sa position sur la scène internationale. Les valeurs de la démocratie, et de l'ouverture (Lodzinski, 2012) ont commencé à être reconnues et à gagner en importance. Le développement d'un marché libre s'est accompagné d'un intérêt pour les voyages à l'étranger et d'une certaine internationalisation des entreprises polonaises. Une certaine prudence reste requise dans l'évaluation de la portée de ces transformations en cours en sorte d'éviter le piège d'une généralisation trop hâtive lorsqu'il s'agit de comprendre le contexte Polonais.

D'un point de vue démographique, la Pologne, aujourd'hui, est à la fois un pays d'émigration et un pays d'immigration (Antczak et al. 2017), confronté aux défis importants d'une pénurie de compétences. Le déséquilibre résulte d'un taux d'émigration élevé et d'un flux d'immigration relativement bas, aggravés par un vieillissement de population et un taux de natalité faible. Pourtant, la pénurie de la main-d'œuvre polonaise n'est pas considérée comme un argument légitime pour promouvoir la diversité culturelle dans un discours politique. D'où la question de savoir quel usage font les entreprises polonaises des politiques diversité pour combler les problèmes de la pénurie de talents.

## Conclusion : Formulation des questions de recherche

Nous cherchons à expliquer pourquoi le modèle anglo-saxon de DM, historiquement axé sur la non-discrimination et le recrutement et l'attraction des talents à l'international, n'imprime pas dans les filiales polonaises. A partir de la revue de littérature et des questions émergeant des enquêtes de terrain, nous avons formulé deux questions de recherche :

1. Dans quelle mesure le contexte organisationnel des filiales polonaises peut-il favoriser ou entraver le transfert international de DM ? (Question de recherche 1)
2. Comment le contexte national du pays d'accueil oriente-t-il les politiques et les pratiques de gestion de diversité ? (Question de recherche 2).

La recherche se propose de montrer comment s'articulent les deux niveaux de l'analyse : national et organisationnel, (Syed et Özbilgin, 2009).

## II METHODOLOGIE

### Choix principaux

Le but de cette thèse est de questionner à partir du cas polonais le courant principal de la littérature existante, et plus particulièrement l'approche anglo-américaine de la DM. L'intention d'une étude de cas multiple était de montrer la pluralité de l'adoption du DM dans différents contextes sectoriels, en mettant l'accent sur une étude de cas particulière qui m'a permis en même temps d'acquérir une connaissance approfondie des circonstances organisationnelles d'un échec du MD en Pologne.

A la différence de l'approche positiviste, les approches exploratoires enracinées s'appuient, depuis les années 50 (Cassell, 2005; Chanlat, 2005), sur les fondements anthropologiques de la gestion. Dans les années 90, sociologues et ethnologues ont commencé à utiliser leur méthode dans les études organisationnelles (D'Iribarne, 1998 ; Dupuis, 2019 ; Chanlat, 2005 ; Segal, 2009 ; 2011 ; 2014). Le mariage des sciences sociales et de l'anthropologie avec les

études de gestion permet de déchiffrer les nouvelles caractéristiques et significations cachées des pratiques organisationnelles. Cette perspective s'applique spécifiquement à l'étude de la gestion de la diversité d'un point de vue socioculturel et historique. Une méthodologie qualitative associée à une approche interprétative (D'Iribarne, 2012) nous sont apparues comme les choix les plus pertinents pour répondre à nos questions de recherche.

La thèse a un caractère exploratoire, car le thème de la gestion de la diversité a émergé en Pologne il y a seulement une dizaine d'années et n'a pas encore été étudié dans les filiales polonaises des entreprises multinationales. Ceci engage à adopter une méthode qualitative, avec un recueil de donnée principalement basé sur des entretiens.

Outre les entretiens nous avons réuni de multiples autres sources de données : données visuelles internes (photographies, campagnes de communication, magazine de l'entreprise, intranet et autres documents), et documents externes.

#### Recueil des données

La thèse est basée sur l'analyse de cas multiples (Eisenhardt, 1989) avec un cas principal, celui de l'entreprise de production (entreprise A dont le siège est en France), qui est ensuite comparé avec d'autres cas (entreprises B, C, D).

Le cas B est une entreprise en services qualité de vie dont le siège est en France; le cas C, est une entreprise en services financiers et assurance dont le siège est en Allemagne, l'entreprise D est une entreprise anglo-suédoise du secteur biopharmaceutique dont le siège est en Angleterre.

La richesse des éléments obtenus sur le terrain dans quatre contextes organisationnels différents a permis de combiner les multiples perspectives d'un phénomène sous-exploré en Pologne et de mettre en lumière la contextualisation sectorielle de DM.

64 entretiens, en tout, ont été réalisés d'une durée d'une heure en moyenne.

**34 dans la firme A** en deux vagues de 17 entretiens, réalisés en 2016 puis en 2017

| Nr | Position                                            | Department            | Nationality | Generation <sup>1</sup> | Remarks                                 | Date  |
|----|-----------------------------------------------------|-----------------------|-------------|-------------------------|-----------------------------------------|-------|
| 1  | Executive Board, Finance Director                   | Finance               | French      | X                       | Interview in French                     | 09/16 |
| 2  | Director of Employees and Social Affairs            | Social affairs        | Polish      | X                       | Phone, Located in power plant in Rybnik | 09/16 |
| 3  | Audit and Ethics specialist                         | Compliance and Ethics | Polish      | Y                       |                                         | 09/16 |
| 4  | Compliance Director                                 | Compliance and Ethics | Polish      | Y                       |                                         | 08/16 |
| 5  | Audit specialist                                    | Compliance and Ethics | Polish      | Y                       |                                         | 08/16 |
| 6  | Communications manager                              | Communications        | Polish      | Y                       |                                         | 08/16 |
| 7  | HR administration specialist                        | HR                    | Polish      | Z                       |                                         | 08/16 |
| 8  | Project support                                     | Communications        | Polish      | Y                       |                                         | 08/16 |
| 9  | Training manager                                    | HR                    | Polish      | Y                       |                                         | 09/16 |
| 10 | Vice Director of risk management and system control | R&D                   | Polish      | Y                       |                                         | 08/16 |
| 11 | Director of Risk management                         | R&D                   | Polish      | X                       | Interview not planned                   | 09/16 |
| 12 | Quality Environment Director                        | Power plant           | Polish      | X                       | Interview not planned                   | 09/16 |
| 13 | Quality management specialist                       | Power plant           | Polish      | X                       | Reluctance                              | 09/16 |
| 14 | Vice Director of R&D                                | R&D                   | Polish      | X                       |                                         | 09/16 |
| 15 | IT manager                                          | IT                    | Polish      | X                       |                                         | 09/16 |
| 16 | Hr Business partner                                 | HR                    | Polish      | Y                       |                                         | 09/16 |
| 17 | Auditor specialist                                  | Compliance and Ethics | Polish      | Y                       |                                         | 09/16 |

Figure 2 Entretiens dans la firme A en 2016

Deuxième vague :

| Nr | Position                         | Department            | Nationality    | Generation | Remarks                                   | Date  |
|----|----------------------------------|-----------------------|----------------|------------|-------------------------------------------|-------|
| 1  | Compliance and Ethics specialist | Compliance and Ethics | Polish         | Y          | Phone conversation, not recorded (30 min) | 05/17 |
| 2  | Compliance and Ethics specialist | Compliance and Ethics | Polish         | Y          | Phone conversation, not recorded (30 min) | 07/16 |
| 3  | Compliance and Ethics specialist | Compliance and Ethics | Polish         | Y          |                                           | 05/17 |
| 4  | Mechanical Engineer              | Power plant           | Polish         | Y          |                                           | 05/17 |
| 5  | Treasury manager                 | Finance               | Polish         | Y          |                                           | 05/17 |
| 6  | Director Assistant               | Finance               |                |            |                                           | 05/17 |
| 7  | Finance Director                 | Finance               | Czech Republic | X          | Fluent in Polish                          | 05/17 |
| 8  | Tax specialist                   | Finance               | Polish         | X          |                                           | 05/17 |

1: Gen X was born in the 1960s and 1970s. Gen Y, were born in the 1980s and early 1990s (Cambridge dictionary).

|    |                                |                       |           |   |                                               |       |
|----|--------------------------------|-----------------------|-----------|---|-----------------------------------------------|-------|
| 9  | Controlling specialist         | Finance               | Polish    | Y |                                               | 05/17 |
| 10 | Compliance manager             | Compliance and Ethics | Polish    | Y | Previously R&D, currently responsible for D&I | 05/17 |
| 11 | Compliance manager             | Compliance and Ethics | Polish    | Y |                                               | 05/17 |
| 12 | Risk management Director       | Compliance and Ethics | Polish    | Y |                                               | 05/17 |
| 13 | IT manager                     | IT                    |           | Y |                                               | 05/17 |
| 14 | Contract specialist            | Finance               | Ukrainian | Z | Started as an intern, Fluent Polish           | 05/17 |
| 15 | Quality specialist             | Compliance and Ethics |           | Z | Part of the diversity team                    | 05/17 |
| 16 | Contractor (External employee) | R&D                   | French    |   | A former employee of firm A in France         | 05/17 |
| 17 | Quality manager                | Power plant           | Polish    |   | Previously assistant                          | 05/17 |

Figure 3 Entretiens dans la firme A en 2017

## 9 entretiens en firme B

| Nr | Position                          | Department               | Nationality | Generation | Remarks          | Date  |
|----|-----------------------------------|--------------------------|-------------|------------|------------------|-------|
| 1  | Recruitment manager               | HR                       | Polish      | Y          | D&I Lead         | 09/17 |
| 2  | Recruitment specialist            | HR                       | Polish      | Y          |                  | 09/17 |
| 3  | Recruitment specialist            | HR                       | Polish      | Y          |                  | 05/17 |
| 4  | Communication specialist          | Communication            | Polish      | Z          |                  | 09/17 |
| 5  | Communication Director CEE region | Communication            | Polish      | Y          | Phone interview  | 09/17 |
| 6  | Business development manager      | Sales                    | Polish      | Y          |                  | 09/17 |
| 7  | Training specialist               | HR – Learning department | Polish      | Y          | Fluent in Polish | 09/17 |
| 8  | Controlling manager               | Finance                  | Polish      | X          |                  | 09/17 |
| 9  | IT Manager Cee region             | Finance                  | German      | Y          | Fluent in Polish | 09/17 |

Figure 4 Entretiens dans la firme B en 2017

## 11 entretiens en firme C

| Nr | Position                        | Department | Nationality | Generation | Remarks | Date  |
|----|---------------------------------|------------|-------------|------------|---------|-------|
| 1  | Auditor                         | Finance    | Polish      | Y          |         | 11/17 |
| 2  | HR Director                     | HR         | Polish      | Y          |         | 11/17 |
| 3  | Business development specialist | Sales      | Polish      | Y          |         | 11/17 |



|    |                                           |            |        |   |  |       |
|----|-------------------------------------------|------------|--------|---|--|-------|
| 4  | HR Business partner (operations)          | HR         | Polish | Z |  | 11/17 |
| 5  | HE Business partner (employee engagement) | HR         | Polish | Y |  | 11/17 |
| 6  | Manager                                   | Sales      | Polish | Y |  | 11/17 |
| 7  | Anti-Fraud manager                        | Finance    | Polish | Y |  | 11/17 |
| 8  | Accountant                                | Finance    | Polish | X |  | 11/17 |
| 9  | IT manager CEE region                     | Finance    | Polish | Y |  | 11/17 |
| 10 | HR Business partner                       | HR         | Polish | Y |  | 11/17 |
| 11 | Compliance Director CEE Region            | Compliance | Polish | Y |  | 11/17 |

Figure 5 Entretiens dans la firme C en 2017

## 10 entretiens en firme D

| Nr | Position                                         | Department      | Nationality | Generation | Remarks              | Date  |
|----|--------------------------------------------------|-----------------|-------------|------------|----------------------|-------|
| 1  | Hr technical support                             | HR              | Polish      | Z          |                      | 11/17 |
| 2  | Compensation &Benefit specialist                 | HR              | Polish      | Y          |                      | 11/17 |
| 3  | Global procurement manager                       | Procurement     | Polish      | Y          |                      | 11/17 |
| 4  | HR Business partner                              | HR              | Russian     | Z          |                      | 11/17 |
| 5  | Regional HR Services Lead for EMEA (HR Director) | HR              | Polish      | Y          |                      | 11/17 |
| 6  | Data manager                                     | Data management | Indian      | Y          | Interview in English | 11/17 |
| 7  | Business analyst                                 | Analytics       | Italian     | Y          | Interview in English | 11/17 |
| 8  | Analyst                                          | Global rewards  | Lithuanian  | Z          | Interview in Polish  | 11/17 |
| 9  | Enablement manager                               | Enablement      | Mexican     | Y          | Interview in English | 11/17 |
| 10 | Recruiter                                        | HR              | Polish      | Y          |                      | 11/17 |

Figure 6 Entretiens dans la firme D en 2017

Notre enquête s'est néanmoins heurtée à certaines limites :

Le choix des personnes interviewées a été déterminé par les interlocuteurs des entreprises. Pour cette raison, il y a peu d'entretiens avec les employés de l'usine de production de l'entreprise A. De plus, les verbatims des entretiens avec les employés étrangers n'ont pas été analysés en détail dans les résultats, en raison de la variété des nationalités et de la focalisation de la recherche sur les perceptions des Polonais.

## L'analyse des données

L'analyse des données a commencé après la collecte des données, même si les premières idées sont venues après les entrevues complémentaires dans l'entreprise A. En raison du caractère exploratoire de la thèse, un retour à la littérature a été opéré en parallèle avec l'analyse des données.

La première série d'entretiens dans l'entreprise A a été transcrite manuellement. La transcription des entretiens supplémentaires a été réalisée à l'aide d'un outil de Google drive, une "saisie vocale".

Du fait du choix d'une approche interprétative, j'ai décidé de procéder au codage manuel des entretiens. L'interprétation était la clé du processus de codage. Pour cette raison, l'utilisation de logiciels dans l'analyse qualitative, tels que Nvivo, n'était pas pertinente dans les deux aspects, codage et analyse des données. Premièrement, le processus de codage n'était pas évident parce qu'au début de l'enquête, l'objet de l'étude de la MD était trop vaste (en raison du caractère exploratoire de l'étude et de l'absence de données théoriques pertinentes).

Le processus manuel de codage s'est déroulé à deux niveaux d'abstraction. La validité des résultats codés manuellement peut être soutenue non pas par la méthode sans faille, mais par l'analyse approfondie des entretiens, son contexte et sa réflexivité permanente. En ce qui concerne le manque de données théoriques sur le sujet, je n'ai pas utilisé le modèle préfixé avec des catégories thématiques.

J'ai comparé les données des études de cas, en me concentrant sur les éléments convergents et divergents de la preuve. J'ai également rédigé un mémoire de 54 pages, un résumé des différences entre les entreprises, basé sur les critères suivants : secteur, historique des filiales, caractéristiques de la main-d'œuvre, type de parties prenantes (salariés, clients...), type de produit/service, innovation, étendue géographique de l'activité des entreprises en Pologne (locale et internationale). Par la suite, le codage manuel a conduit à une conclusion sur la contextualisation sectorielle

L'analyse des données visuelles est très révélatrice et mérite une attention particulière. Par exemple, D'Iribarne (2012) a appliqué les techniques d'interprétation aux éléments écrits de la preuve comme les rapports annuels, les documents d'entreprise et les documents de

communication, soutenant qu'ils peuvent " révéler les appréhensions qui habitent la personne qui parle " et " fournir les indices " qui sont une source supplémentaire et significative d'information pour un chercheur.

### III RESULTATS

Les résultats de notre recherche peuvent être présentés en trois temps :

- Le constat, tout d'abord, de l'échec manifeste rencontré par l'entreprise française engagée dans le transfert de ses engagements diversité au sein de sa filiale polonaise.
- Une analyse comparée de nos quatre cas conduisant à dégager quelques dimensions explicatives des différences observées entre eux.
- Une analyse culturelle identifiant ce que peuvent avoir de commun, en dépit des différences observées au point précédent, les attitudes et les comportements des acteurs polonais vis-à-vis de ce nouvel objet qu'est pour eux le MD.

Un transfert avorté : le cas de l'entreprise A.

La Charte diversité a été signée dans une filiale Polonaise de firme A presque dix ans après le siège et ceci étant fait par un comité composé de onze Directeurs et une femme, ce qui montre bien également des paradoxes au niveau de la diversité du genre. La section consacrée à l'entreprise A met en évidence deux cas de figure : le rejet des pratiques globales au niveau de la filiale d'un côté et la réinterprétation et réinvention d'initiatives locales.

Pour illustrer le premier cas de figure, celui du rejet, on peut mentionner la version polonaise de la campagne d'anti stéréotypes et de diversité qui met l'accent sur le sexe, l'âge, le handicap et le rôle parental et ignore d'autres dimensions telles que la religion, la nationalité et l'orientation sexuelle. En outre, l'équipe polonaise a modifié la note sur la non-discrimination et l'égalité des chances en mettant l'accent sur les attitudes ouvertes au travail. La présentation des politiques anti-discrimination dans les engagements organisationnels a été remplacée par le sujet de l'ouverture à multiple reprises. Les engagements en faveur de la diversité sont inclus dans les documents existants tels que les politiques RH, code éthique ou

l'accord RSE, ce qui peut conduire à accorder une importance très secondaire à la démarche diversité.

Un exemple du deuxième cas de figure, celui de la réinterprétation, de nature à éluder le sujet, est la thématique retenue pour la campagne locale de diversité qui, lors de la journée de diversité au sein de l'entreprise A, met en avant la diversité des cocktails de fruits. Cela permet de dire que les politiques de diversité au niveau de « compliance » n'abordent pas les mêmes problèmes que celles développés par leurs collègues de siège.

Une analyse comparative des quatre cas étudiés

Le secteur, le gap générationnel et le transfert des connaissances sont les trois facteurs de divergence entre les quatre études de cas identifiées par la recherche. Ces résultats éclairent les raisons proprement organisationnelles pour lesquelles, en dépit du besoin de renouvellement de la main d'œuvre dans l'entreprise A, le management de la diversité ne fait pas partie de la stratégie RH.

Le secteur d'activité

Notre échantillon de cas a délibérément fait varier le secteur de l'activité et le profil de la main d'œuvre employée.

Le secteur de la production énergétique n'apparaît pas franchement intéressé par la diversification de ses recrutements. Le MD semble bien mieux accueilli dans les univers de service (cas B et C) et mieux encore dans l'entreprise d'innovation biopharmaceutique, bien que dans ce dernier cas, le MD ne soit pas formalisé dans des politiques affichées. Malgré la pénurie de candidats et les besoins de recrutement en Pologne, la recherche de candidats d'autres nationalités est jugée en général inappropriée dans tous nos cas. Ceci peut s'expliquer en partie par l'ancrage local de l'activité organisationnelle (par exemple, clientèle polonaise, présence régionale dans les entreprises B, C).

Dans l'entreprise A, c'est la promotion et la défense de "culture de la sécurité" dans l'entreprise A qui est mise en avant comme argument. Les prises d'initiatives des employés, associées au

renouvellement de leur profil, sont regardées comme dangereuses au regard des standards de sécurité qui se méfie de l'innovation et appelle à l'inverse le respect des routines et l'adoption des conduites prescrites

Le cas B sert en particulier des clients polonais (par exemple, le Parlement et le stade national de Varsovie). La clientèle nationale polonaise est considérée comme une limite à l'adoption des objectifs classiques du DM et n'est pas compatible avec le principe de la création d'un environnement culturellement et linguistiquement diverse.

Le cas C offre des produits financiers en majorité à des clients individuels polonais situés dans des zones urbaines et rurales. Pour cette raison, les volets du MD, comme le recrutement ciblé sur la diversité culturelle ou d'autres dimensions primaires de la diversité, ne sont pas vraiment jugés utiles en raison d'une main-d'œuvre et d'une clientèle majoritairement autochtones. La prévention des préjugés et la lutte contre le risque de discrimination et de traitement inégal sont considérées comme des concepts superficiels.

Le MD est, en revanche, considéré comme faisant partie intégrante de l'activité de l'entreprise D liée à "l'internationalisation de l'innovation" (site web, 2019). *"La diversité fait généralement partie du processus d'innovation, qui est énorme dans cette organisation "* déclare un responsable russe du recrutement. Des employés étrangers et polonais ont souvent reconnu que la politique diversité faisait partie intégrante de l'identité organisationnelle axée sur l'innovation, sans être le résultat d'une politique formelle. La comparaison avec le cas A est édifiante : l'entreprise D pratique une diversification volontaire de ses recrutements sans avoir ni charte ni politique affichée comme en possède l'entreprise A qui se garde de les mettre en œuvre.

### L'âge ou l'effet générationnel

La moyenne d'âge des employés de l'entreprise influence-t-elle les lectures qui sont faites du MD ?

Afin d'éviter toute généralisation, il convient de tenir compte de facteurs de différenciation entre les générations que peuvent être les opportunités de voyages internationaux dans le contexte organisationnel, l'ancienneté au siège social par rapport aux bureaux régionaux,

l'éducation (nationale vs. Internationale) mais aussi l'attachement aux traditions (conservatrice, catholique) et la maîtrise de langues étrangères.

Il existe une disparité considérable entre la société de production d'énergie et les trois autres cas. La majorité de l'entreprise A emploie les Polonais de la génération X (de 40 à 55 ans et plus), notamment au niveau de l'usine de production. Beaucoup parmi les membres de génération X ont passé une large partie de leur vie professionnelle dans des entreprises anciennes du secteur public. La plupart des employés de l'entreprise A n'ont pas eu l'occasion de travailler avec d'autres nationalités sauf avec les directeurs français de l'entreprise A (Compliance manager, 2017).

La moyenne d'âge dans l'entreprise D est de 30 ans, tandis que dans les entreprises B et C la moyenne est de 35 à 40 ans. Les générations Y et Z sont plus susceptibles de voir la valeur ajoutée et de profiter des avantages de la mondialisation et de la gestion de la diversité qui en résulte, par exemple, en utilisant l'anglais comme langue d'entreprise. Par exemple, le responsable des études cliniques dit que : *"la jeune génération est plus ouverte et courageuse"*. *Eh bien, vous pouvez le dire, c'est ainsi qu'ils voient une grande opportunité dans cette mondialisation et ils sont heureux de pouvoir travailler avec des gens d'autres pays et de parler anglais"*. Bien que l'entreprise D emploie principalement un personnel jeune, cela n'implique pas la facilité du transfert des politiques originales du siège ni leur implémentation sans critique au niveau de l'unité polonaise. Cela signifie que les pratiques de gestion de diversité sont susceptibles d'être adoptées dans les entreprises où les salariés qui peuvent en profiter, notamment des jeunes générations dans les départements autres que la production.

### Transfert de connaissances

Le transfert de connaissances et de compétences entre les filiales et le siège n'est certes pas un phénomène nouveau, mais il est particulièrement intéressant d'étudier dans cette perspective du transfert de DM en Pologne.

Dans les quatre entreprises, le transfert des connaissances et des compétences dans les filiales polonaises ne passe ni par l'attraction de compétences diverses ni par le recrutement de main-d'œuvre internationale, mais plutôt par les interactions inter-organisationnelles et par d'autres

pratiques. Cette section examine deux types de transferts qui ont lieu dans les quatre études de cas :

- Les transferts au niveau international (du siège vers les filiales polonaises)
- Les transferts au niveau national (du siège social vers les unités régionales)

Ceci en tenant compte de trois dimensions : tout d'abord, la dimension internationale des interactions avec le siège et d'autres filiales étrangères, ensuite le volume des interactions et enfin les niveaux de gestion où ces interactions se sont produites.

Dans l'entreprise A, les échanges entre la filiale polonaise et l'équipe du siège français (appels et vidéoconférences) entre 2015 et 2017 avaient pour objectif d'aligner les plans d'action locaux avec les politiques globales et de partager les meilleures pratiques au sein du Groupe. Cependant, malgré une communication régulière, le résultat du transfert des meilleures pratiques n'a pas été satisfaisant pour l'équipe française qui souhaitait unifier les initiatives tandis que le département polonais se concentrait sur l'avancement de son propre programme. Au niveau régional, la stratégie polonaise de la diversité n'a été diffusée que dans la centrale électrique de Cracovie, sans tenir compte des autres centrales électriques en Pologne, donc le processus d'apprentissage et le transfert d'informations au sein des unités régionales ne s'est pas vraiment réalisé.

La participation à des projets et à des conférences internationales qui nécessitent des déplacements au niveau de la filiale dans l'entreprise A s'est faite au seul niveau de la direction.

Dans l'entreprise D, l'échange international de connaissances, de compétences et d'expériences a eu lieu à tous les niveaux d'ancienneté dans divers départements et groupes d'âge. Le cas d'entreprise D se distingue des autres cas au niveau de tous les facteurs organisationnels.

#### Les facteurs culturels – Convergences entre les cas

La façon dont la promotion de l'identité nationale polonaise interfère avec le management de la diversité constitue un trait commun à nos quatre études de cas. Ce souci des intérêts nationaux, jusque dans les lieux de travail, s'est construit au fil de l'histoire. Il illustre le fait que la domination hégémonique d'un groupe culturel peut, au nom de la défense de la cohésion

sociale au sein du groupe dominant, le conduire à une ignorance ouverte des problèmes de discrimination et d'exclusion des autres employés.

Le concept de "polonité" (Wielicki, 2002), est perçu à travers le maintien d'un environnement de travail homogène garanti par le recrutement de la main-d'œuvre polonaise dans l'entreprise A ; la préservation d'un environnement de travail polonais et la présence des symboles nationaux s'observent en particulier dans les campagnes locales de diversité (entreprise A).

La "polonité" de l'entreprise D se traduit de façon différente. Elle repose sur une proximité linguistique et culturelle avec les autres salariés d'Europe de l'Est. On peut se demander dans quelle mesure les employés venus des autres pays d'Europe de l'Est ont plus d'atouts pour s'intégrer en raison de leur proximité culturelle et linguistique mais aussi en raison de l'historique de la coopération de leurs pays avec la Pologne (Nowicki, 2002). Pourtant l'appel aux nationalités d'Europe de l'Est n'est pas particulièrement pris en compte dans le processus de recrutement (entreprises B, C, D).

#### IV DISCUSSION DES RESULTATS

La discussion de nos résultats s'organise en deux parties : la première partie souligne la prégnance d'une nouvelle forme diversité (gestion internationale de la diversité, IDM) qui, en Pologne qui fait intrinsèquement référence à l'ouverture internationale, prenant un sens spécifique pour les salariés polonais. Nous intitulons cette dimension "International Diversity Management" (IDM). La deuxième partie de la discussion interroge « l'échec » du transfert du MD en Pologne. Les approches plus que discrètes, frisant parfois le non-sens, rencontrées en matière de gestion de diversité, notamment dans l'entreprise de production doivent-elles être regardées comme un indicateur de « l'échec » du transfert de la gestion, en se plaçant du point de vue de la maison mère ou bien comme le fruit d'une réinterprétation locale délibérée ?



Elargir la notion de diversité à l'ouverture internationale

Le MD en Pologne peut aussi prendre sens en tant qu'"ouverture internationale", alimentée par les relations avec les parties prenantes externes, y compris les employés des autres filiales, le siège et les clients internationaux. Cette dimension que nous appelons IDM se traduit également dans les pratiques de mobilité internationale des employés et dans la participation des Polonais aux projets internationaux. L'ouverture internationale est considérée comme le résultat vécu par les personnels polonais d'une politique orientée vers la mobilité internationale, sans être une politique assumée de diversité émanant de la Direction RH.

Le siège joue un rôle essentiel dans l'émergence de cette IDM en Pologne, l'internationalisation en permettant aux salariés de coopérer avec les équipes des autres filiales du Groupe.

Le concept "d'ouverture" illustre plein des paradoxes. D'un côté, les résultats de nos recherches constatent l'existence d'attitudes réservées à l'égard de la création d'une communauté culturellement diverse sur le lieu de travail polonais, ce qui peut être considéré comme une réticence envers les formes classiques de MD. De l'autre, les employés polonais sont désireux d'explorer les avantages de l'ouverture et des apprentissages organisationnels qu'elle ouvre avec l'ambition, au service du renforcement de leur identité nationale, pour "rattraper" les homologues occidentaux.

L'introduction du MD peut être considérée comme la suite d'une transformation sociale des entreprises polonaises (Kozminski, 2008), qui sont devenues aujourd'hui les filiales d'entreprises multinationales. Le sort du MD en Pologne est une bonne illustration d'un large transfert de connaissances et de pratiques importées de l'Europe de l'Ouest, réinterprétées (Kozminski, 2008) selon les logiques décrites par les acteurs locaux.

Faut-il regarder les transferts du MD comme un échec ?

Il importe ici de mettre en évidence la diversité des perspectives possibles pour répondre à la question : Qui a échoué et quoi ? De quel point de vue ? Celui du siège ou celui de la filiale ? Des "acteurs" chargés de la mise en œuvre du MD ou des destinateurs locaux (Maj, 2015) ?

Dans le cadre d'une comparaison internationale, une forte représentation de la diversité culturelle dans les postes de direction en Pologne pourrait être interprété comme une « bonne

pratique » de diversité à suivre et donc comme un « succès ». A l'inverse, l'absence de mise en œuvre des outils classiques du MD dans un environnement donné pourra être taxé d'échec. Nos études de cas montrent que cette approche peut être trompeuse. Une certaine ouverture à la diversité peut exister dans des filiales n'affichant pas d'engagements MD (entreprise D) tandis qu'à l'inverse, en dépit de l'existence d'une panoplie importée de mesures « classiques », le MD soit en réalité totalement ignoré dans la même entreprise (entreprise A). La question se pose donc de savoir si l'absence des mesures de non-discrimination est forcément le signe d'un échec total de MD et si l'appellation d'échec peut être acceptée sans discussion ni analyse interculturelle ? Les études interprétatives de MD fournissent une réponse partielle à cette question. Les études de cas permettent de comprendre des situations et des expériences interculturelles qui n'excluent pas la possibilité de l'émergence de pratiques de diversité qui, à l'échelle des personnels concernés, sont totalement nouvelles et significatives.

Certes des arguments existent en faveur de la thèse de l'échec dans la mise en œuvre du modèle classique de DM dans les filiales polonaises. L'interruption immédiate et définitive de la politique de promotion de la diversité sitôt acté le changement de propriétaire en est l'illustration la plus patente. Le caractère parfois absurde des initiatives prises soi-disant en faveur de la diversité au sein de la société de production (entreprise A), alors qu'elles étaient initialement conçues pour traiter les questions de l'égalité, pour promouvoir la diversité et pour prévenir la discrimination, va dans le même sens. La filiale polonaise disposait certes de l'autonomie nécessaire pour déployer les plans d'action locaux, mais on attendait néanmoins d'elle qu'elle respecte au minimum les valeurs communes d'une entreprise multinationale, en particulier là où le risque de discrimination et de stéréotypes persiste en dépit (ou à cause) du caractère très homogène du corps. En outre, la présence des symboles nationaux dans la campagne pour la diversité polonaise et la volonté de préserver l'environnement de travail polonais pourraient également être considérées, aux yeux des acteurs du siège, comme l'illustration d'un « l'échec » de la vocation multi-culturelle et internationaliste du MD.

Des frustrations à l'égard du MD, illustrant une forme d'échec dans sa tentative de convaincre de son bien-fondé, peuvent exister aussi, comme dans l'entreprise A, au niveau des soi-disant bénéficiaires, comme en témoignent l'insatisfaction ou le manque d'intérêt des bénéficiaires aux niveaux inférieurs de la gestion. Le soutien de la direction générale, notamment au niveau

des filiales, n'est pas une condition préalable à la mise en œuvre réussie des politiques de diversité (Bruna, 2019). Il doit aussi pouvoir s'appuyer sur un engagement fort des parties prenantes (Maj, 2017).

Néanmoins, le terme "échec" semble poser problème et devrait être utilisé avec prudence, car il ignore les variations interculturelles de MD. Le terme "échec" ne rend pas compte de l'interprétation réelle des pratiques en matière de diversité pour les employés polonais. Pour cette raison, le terme de la résistance semble plus adéquat, car il souligne le refus des normes internationales de gestion de la diversité dans toutes les études de cas (entreprises A, B, C, D).

Il semble qu'il n'y ait pas, au final, de réponse simple à la question de savoir si MD a échoué en Pologne ou non. D'une part, la compréhension de l'échec conduit à naturaliser l'hégémonie des standards internationaux de management, à l'image de la banalisation imposée de l'utilisation de l'anglais comme "Lingua Franca" (Tréguer-Felten, 2013). D'autre part, la contextualisation du phénomène de "l'échec de la diversité" conduirait à spécifier plus précisément les champs visés et désigner, par exemple, l'absence d'actions visant à traiter les problèmes réels, tels que le racisme, la xénophobie ou les stéréotypes de genre, chacun relevant d'une analyse spécifique.

## CONCLUSION

La thèse apporte des contributions théoriques originales dans le domaine du MD, mais elle possède aussi ses limites.

### Contributions théoriques

Cette thèse constitue une contribution théorique aux études interprétatives sur le MD (Özbilgin, & Chanlat, 2017 ; Brabet et al. 2019) et aux approches critiques de la gestion de la diversité (Kersten, 2000). Elle confirme la nécessité d'introduire une contextualisation nationale et sectorielle dans les recherches sur le MD. Elle prend en compte les influences meso (organisationnelle) et macro (nationale) et leur impact sur le niveau individuel (Özbilgin, 2015 ; Vassilopoulou, 2012).

Elle s'inscrit également dans l'analyse critique des transferts d'outils de gestion à vocation universelle.

#### Analyse contextualisée du MD

Le caractère original de la thèse repose sur l'étude approfondie de la mise en œuvre du MD dans quatre secteurs différents situés dans un contexte national culturellement homogène. Le transfert international de DM en Pologne n'avait pas jusqu'ici fait l'objet d'études approfondies basées sur la méthodologie des études de cas multiples. La littérature a souligné ce manque et appelé à étendre les périmètres d'étude à de nouveaux champs nationaux (Barth 2007 ; Chanlat, 2017).

Peu d'attention a été accordée aux pays postcommunistes d'Europe de l'Est. Les études interprétatives sur le pays homogènes sont également rares dans la recherche. La Pologne est pourtant un excellent exemple d'une société dans laquelle il existe un besoin d'aborder la problématique des talents internationaux et de briser le thème de la discrimination et des stéréotypes, dimensions les plus problématiques du discours politique et social du gouvernement conservateur.

Cette recherche, en s'appuyant sur les études des chercheurs en sciences sociales et en histoire (Lodzinski, 2012), est aussi une contribution à la littérature sur la construction historique de la diversité en lien avec l'identité nationale. La thèse révèle que les "échecs" du transfert du modèle classique anglo-saxon en Pologne ne peut être compris sans considération de l'histoire nationale, et en particulier de la lutte pour restaurer et préserver l'identité nationale polonaise. La thèse permet d'interroger le concept de "l'altérité" et le rapport à "l'autre", toujours dans une perspective historique. Les termes de diversité et d'altérité sont utilisés de façon récurrente dans la littérature, mais souvent présentés d'un point de vue abstrait sans enracinement culturel et historique.

Nous proposons d'ajouter une nouvelle dimension au concept de la diversité, à savoir, l'ouverture internationale ou « International Diversity Management » qui, au-delà du recrutement, objet privilégié par les approches classiques centrées sur les pratiques discriminatoires à l'embauche, renvoie à d'autres pratiques.

Dans cette optique, les résultats contribuent à la "théorie des acteurs" en MD. Nous rejoignons les conclusions de Maj qui suggère que l'implémentation "réussie" de DM (Maj, 2017) est déterminée par le niveau d'engagement et de gestion des différents acteurs : (employés, syndicats, ONG) ; (responsables de la promotion du MD) ; (médias, concurrence, clients, communauté et société) et (actionnaires, gouvernements et régulateurs) (Maj & Walkowiak, 2015).

### Transfert interculturel dans le management

Le périmètre couvert par la thèse se concentre sur les filiales polonaises des MNC. Cette thèse est à ce titre une contribution aux études sur l'approche interculturelle dans le transfert en management, qui suggèrent que les pratiques de management sont enracinées dans les contextes culturels (Chevrier, 2015). Elles doivent, en fonction des interprétations locales, être adaptées localement ou entièrement réinventées.

A la lumière des théories "universalistes" de gestion de la diversité, cette thèse a permis de confirmer que le transfert ne peut être compris sans l'analyse de sens attribuée aux pratiques qui diffèrent d'un pays à l'autre (D'Iribarne, 1989). Par ailleurs, le malentendu entre les salariés Polonais et Français (entreprise A) montre clairement l'interférence des questions de communication interculturelle dans le contexte du transfert de pratiques de gestion.

Cette thèse confirme aussi l'impact sur la gestion des transferts interculturels de la dimension linguistique (Tréguer-Felten, 2009), car le transfert décevant de DM peut aussi se justifier par les dissemblances linguistiques. L'utilisation de l'anglais comme "Lingua Franca" (Tréguer-Felten, 2009) ignore le fait que les termes clés dans une langue peuvent être difficiles à traduire dans une autre langue, et perdent le sens original (c'est ici, par exemple, le sort réservé au terme de "l'inclusion", difficilement traduisible et source de malentendus hors de son contexte d'origine).

### Contributions managériales

Les recommandations formulées par le « main stream » à l'intention des gestionnaires locaux sont double. D'une part, il leur est demandé de traiter explicitement les risques de

discrimination sur le lieu de travail en Pologne. D'autre part, Il leur est rappelé, conformément aux normes internationales, qu'il convient de mettre en œuvre des politiques mesurables fondées sur des plans d'action mesurables et significatifs.

Cependant, les résultats de notre recherche montrent que pour donner un sens au MD en Pologne, il ne suffit pas de le poser comme une norme évidente, allant de soi. Il importe de tenir compte des représentations et des aspirations des destinataires polonais de ces injonctions. L'ouverture internationale peut être un levier pour promouvoir une prise de conscience des apports liés à la diversité culturelle. Organiser des groupes de discussion dans d'autres départements que les RH et associer les services opérationnels dans la construction du discours interne aux entreprises sur la diversité (par contraste avec un « parachutage » venu de l'extérieur) pourrait être pertinent pour les acteurs locaux tout en servant de relais local pour les sièges.

En France, il est largement reconnu que la diversité va de pair avec le discours sur la discrimination et que la gestion de la diversité met en lumière les dimensions qui sont fortement exposées à la discrimination et qui sont donc problématiques dans un débat social. On pourrait regarder la Charte de la diversité comme un outil potentiellement efficace de changement culturel en Pologne, à condition de reconnaître des actions palpables et mesurables allant au-delà des dimensions limitées du développement durable et des aspects moins problématiques tels que le sexe et l'âge.

Néanmoins, le contexte historique de la Pologne rend difficile à court terme d'imaginer la création d'un environnement de travail multiculturel, en particulier dans les sociétés de production, où la présence des Polonais et des anciennes générations est dominante.

L'internationalisation des organisations (Maj, 2017) semble être une opportunité pour développer la gestion de la diversité dans les organisations privées. Mais l'utilisation de MD dans des organisations patronales en Pologne n'a pas été jusqu'ici traitée dans la littérature. La question se pose de savoir quelle forme de DM pourrait être valorisée, dans les secteurs de production en Pologne qui ont une forte tradition syndicale. Certains chercheurs et les médias polonais suggèrent que les entreprises à capital public avec une forte tradition syndicale sont moins favorables à la valorisation de la diversité culturelle.

## Limites de la recherche

### Du point de vue théorique

Il était clair dès le début de la recherche que le grand intérêt de ce doctorat est l'étude de la diversité dans le contexte unique polonais. Il est impossible de traiter le concept de diversité sous tous ses aspects, y compris le sexe, l'âge et le handicap, les dimensions qui exigent une analyse approfondie de l'environnement extérieur sur chacun de ses aspects. Cependant, l'accent mis sur une dimension unique, la diversité culturelle s'est avéré le bon choix qui a permis de prendre en compte le contexte historique plus large et les questions d'identité nationale et le rôle qu'elle joue dans la gestion de la diversité en Pologne. Il en va de même du problème de la discrimination et de l'étude de la perception culturelle de la diversité des nationalités et de la construction historique de "l'autre" dans la perspective individuelle qui pourrait être faite dans une autre thèse.

L'étude met l'accent sur la perspective étroite de la recherche dominante sur la MD, mais l'attention principale a été portée aux études de la DM dans les différentes perspectives nationales qui ont permis d'établir la dichotomie des pays hétérogène/homogène. Dans la même perspective, nous avons omis la variété des approches de l'identité nationale, en attirant une attention particulière à l'identité nationale polonaise, qui s'est avéré être l'élément clé pour saisir pleinement le caractère unique du DM en Pologne et ses limites.

### Du point de vue méthodologique

L'obligation faite aux chercheurs de respecter la confidentialité imposée par les entreprises est une des limites à laquelle nous nous sommes heurtés. Cette contrainte de confidentialité n'a pu qu'être partiellement compensée par la richesse de sources d'information externes fournissant les éléments du contexte des organisations.

La thèse fait référence aux politiques et pratiques globales des entreprises étudiées, mais nous n'avons pu, en dépit de multiples démarches, accéder aux sièges centraux pour recueillir le point de vue des acteurs des sièges centraux. Je m'appuie sur l'expérience du stage effectué en 2015 au sein du siège français de l'entreprise A en 2015. Pour les autres cas, je m'appuie

sur les données externes<sup>2</sup>, à l'exception de la documentation du siège de la société C, disponible seulement en allemand.

La thèse a montré que la gestion de diversité devrait également être contextualisée en ce qui concerne les différences sectorielles, en mettant fortement l'accent sur les limites d'un secteur de production. Cependant, notre travail ne produit pas d'analyse détaillée de chacun des secteurs (finance, services et biopharmaceutique) qui mériterait d'être faite dans le cadre d'un approfondissement de cette recherche.

## CONCLUSION GENERALE

A la lumière des prévisions démographiques, l'orientation du MD en Pologne a toutes les chances de prendre une actualité croissante dans les années à venir. Notre recherche a voulu analyser ce sujet encore peu étudié qui est appelé à prendre beaucoup d'importance dans la gestion de la diversité culturelle dans un environnement polonais de travail inscrit dans un contexte national particulièrement homogène.

Bien que la chute du communisme en Pologne soit considérée comme un chapitre clos de l'histoire nationale, il semble que la gestion de la diversité fasse partie intégrante de la transformation en cours de l'environnement économique polonais. Elle montre l'existence de barrière idéologique entre l'Europe occidentale et l'Europe de l'Est. L'inclusion des employés étrangers dans la société dominante autochtone et la concrétisation des politiques de non-discrimination devraient être éclairées dans le débat politique et le discours organisationnel. Pour qui voudrait sensibiliser les acteurs locaux et introduire des pratiques innovantes autour du thème de l'ouverture internationale mais aussi autour de sujets plus controverses comme la diversité des religions, les communautés LGBT et transgenres, il est nécessaire d'intégrer

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<sup>2</sup> En raison de la richesse des documents en annexes, j'ai décidé de ne pas inclure les politiques de diversité de Groupe, car elles sont d'une importance secondaire pour la discussion des résultats.



dans les analyses et les stratégies la prise en compte des fondements historiques à l'origine des aspirations nationales et patriotiques en Pologne.

## THESIS INTRODUCTION

*“Does this mean that we are fated to choose between cultural imperialism and a value of relativism that leads to all behaviors being acceptable, no matter how shocking they may seem to us, in the name of respect for cultural diversity? This question is not simply one for the great debates on democracy and human rights. At a more down-to-earth but no less insistent level, it also arises on a daily basis in the subsidiaries of global enterprises”.*

(D'Iribarne, 2012)

Foreign subsidiaries of multinational firms face multiple challenges of adaptation to the international transfer of management practices as a result of globalization (Barmeyer & Davoine, 2011) and internationalization processes (Maj, 2017). Transfer of tools and ideas (Czarniawska & Sevón, 2005) became a hallmark of contemporary organizations and their environments (Segal, 2012; Saleh, 2015). A good illustration of cross-country transfer is Diversity Management (DM), a polysemic (Chanlat, 2017), controversial and relatively recent phenomenon emanating from the headquarters of multinationals (Maj, 2017). This thesis aims to investigate what DM policies and practices become once they are transferred from headquarters to Polish subsidiaries, while keeping in mind a bigger picture on the future opportunities of DM in Poland.

This Ph.D. is based on a belief that: *“a researcher has to make choices about the approaches, the strategies and the methods, which are most suitable to the research project”* (Vassilopoulou, 2015 p.108). For this reason, the thesis draws attention to a relatively new and unexplored international dimension of diversity and its management in the Polish context, while voluntarily ignoring other dimensions, such as gender, age, disability or sexual orientation. An in-depth understanding of several different dimensions of diversity would be a challenging task, particularly considering that each characteristic presents complex dilemmas

with diverse implications for organizations. The International Diversity Management (IDM) opens the possibility for deliberations on the attraction of foreign workers in the context in which the diversity of nationalities and the associated discrimination risks are clearly silenced in both the political agenda and organizational initiatives. These questions are particularly interesting in Poland, as the concepts of equal opportunity, non-discrimination, and the principle of valuing culturally diverse and inclusive workplaces have been identified only marginally in the Polish case study.

### Why study DM in Poland?

Part of Central Eastern Europe, Poland is an essential political “leader in the East<sup>3</sup>”, but from a cultural and economic standpoint it is trying to achieve the status of a developed country, while being part of “Middle Europe”, or the so-called “Other Europe” (Kundera, 1983; Nowicki, 2012; 2017) englobing countries which, on the one hand, have not experienced colonial expansion or continuous sovereignty, and on the other hand, encounter moving borders and external influences. Examining the Polish historical context is key to understanding the issues with the national identity and European identity construction in light of Brexit and (the less likely but as controversial) “Polexit” scenarios, and the rise of populism across Europe and beyond. Polish history, its political perimeter and its cultural anthropology enrich the current case studies.

Poland is one of the world’s most homogeneous countries in terms of nationalities and beliefs, but despite what is commonly assumed it has not always been the case, as Poland was a multi-ethnic and multi-religious society back in the XIVth and XVIth centuries. The historical and political imaginary (Nowicki, 2002) finds its roots back in an unsolved historical debate over two distinct visions of Poland: Poland under Piast and Jagiellonian heritage. The baptism of the state in 966 by Mieszko was a milestone in the “Polish statehood” formation and became a symbol of the national identity and attachment to the Roman Catholic church and Latin civilization. The Piast heritage was related to “the essence of the Polishness”, the idea of unified territory and state on the ground of ethnicities, religions in a concrete “biological” sense (the belongingness by birth and blood) as well as imaginary belongingness to a single community. The Jagiellonian tradition is the bulwark of a multicultural inheritance of the Polish

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<sup>3</sup> Member of NATO, UN, Schengen, EU and The Visegrád Group etc.

state ruled under the Polish–Lithuania Commonwealth, Republic of two nations and land of many nationalities called Slavonic people.

Polish history is the story of a state which disappeared from the world map for one hundred and twenty-three years (between 1795 and 1918)<sup>4</sup> and experienced historical discrimination at the national level on the linguistic, cultural, geopolitical and ethnic plan, as Poles under occupation were discriminated for “being a Pole”. Nevertheless, Poland before 1795 was capable of accommodating several ethnic and religious identities, but this tradition was shattered by the failed insurrections of 1830 and 1863-4 against the Russian empire, giving rise to the Polish romantic messianism and the national philosophy based on two idealist trends: the cult of sovereignty and the conviction in a special mission of redemption similar to the mission of Christ (Walicki, 2002).

Afterward, the monoethnic image of Poland was nurtured by drastic population changes during World War II, which is an underlying, hidden structure of a collective memory of persecutions, deportations and oppression that is still present in the political debate today. The Polish mission to preserve Christian values of the European civilization was one of the key themes of the political program (2014-2019) of the nationalist and conservative party PiS (Law and Justice). Rejection of the European immigration and refugee projects and the ignorance of discrimination verification mechanisms in the employment sphere somehow illustrate the unfavourable institutional context in which DM took place. But there is another side of the same coin.

In contrast to typical immigration societies, cultural homogeneity is reinforced by the low inflow of immigrants (Antczak et al. 2017) and the widespread outflow of Poles to the West qualified as “the Polish Exodus”, amplified since the openness of Polish borders in 2004.<sup>5</sup> Between negative demographic trends and aging population, Poland is struggling against the scarcity of available workforce which has important implications on the domestic labour market and overall economic growth (Ministry of Family, Labour and Social Policy, 2019). Many adequate and available skills of the immigrant population remain untapped, while Polish and international media claim that the government may apply a hidden strategy of talent

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4 Partitions of Poland, (1772, 1793, 1795), three territorial divisions of Poland, perpetrated by Russia, Prussia, and Austria (Britannica, 2019). The third partition put an end to the Polish–Lithuanian sovereignty until 1918.

5 Polish accession to the European Union.

attraction, from Eastern Europe in particular. From the economic perspective, *“in transitional economies, issues of diversity, difference and inclusion are closely linked to aspirations for economic transformation”* (Özbilgin & Syed, 2015).

The Polish government is becoming increasingly polarized between economic incentives to attract talents and political promise to keep the country detached from a multicultural project and European immigration standoff. The supply barriers in the domestic markets are listed as the third biggest macroeconomic challenge for Poland along with government’s protectionism, foreign trade restrictions as well as disintegration of the Eurozone. The question is whether the far-right government will keep an anti-immigration stance and quietly select only Christian immigrants from historical friends of Eastern Europe and privileging some nationalities and religions over others.

Poles in multinationals tend to distance themselves from nationalist politics<sup>6</sup>, but also admit the controversies linked to the lack of openness towards cohabitation and accommodation of diverse nationalities in everyday life (Lisowska & Sznajder, 2013). According to data, a lower level of openness prevails among Polish employees in public administration organizations, but it could be related to the party efforts to impose political control over business, political and cultural life, which therefore resulted in several demonstrations over the last year. For instance, after the “re-Polonization” of foreign-owned media in Poland, many Polish journalists and radio speakers lost their jobs last year, after publicly criticizing the government.

The Polish background is full of paradoxes. Recently, Poland has been divided between the philosophy of “Polishness” and “Europeanity”, the idea of closeness (perceptions of otherness), and openness (intensity of international mobility and internationalism), thus questions about DM are less than straightforward. DM in Poland is seen as a business strategy and cannot be fully understood without having a conversation about “the historical wounds” (Gryszko, 2009).

This raises question about the significance of the study of DM in Poland in management sciences. Several studies (Kelly & Dobbin, 1998; Thomas & Ely, 1996) highlight the US tradition of DM, which has its roots in the AA (Affirmative Actions) and Equal Opportunity Act,

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<sup>6</sup> The study on openness of Poles towards diversity by NGO (Brown, 2017) suggest a lower level of acceptance of diversity of nationalities (for example Roma, Syrian and Moroccan) among employees in public, administration organizations.

predominantly focused on the non-discrimination, pro-equity and recruitment of ethnically diverse workforce. Consequently, DM has been largely treated in HRM literature as being concerned with attraction, recruitment and managing of a diverse workforce on the ground of backgrounds and identities, while creating inclusive workplaces in which diversity is seen as a factor of organizational and individual performance. A largely recognized problem in the literature is that the headquarters of Nord-American and Western European companies attempt to implement the universal diversity strategies across the subsidiaries, while creating an illusion of an equal value of D&I (Diversity and Inclusion) worldwide, mainly for compliance reasons. This raises several important questions in management studies, such as: what happens precisely after the mainstream organizational DM strategy is transferred to another cultural universe? This opens an opportunity for deliberations about a gap between DM at compliance level and its actual practice from a bottoms-up perspective.

The contextual and transnational approaches to DM in different countries, articulated with a multilevel analysis (Chanlat & Özbilgin, 2017) taking into consideration the specificity of the organizational and cultural contexts of the recipient countries, has received particular attention. Scholars highlight a variety of transfer difficulties such as: overall organizational resistance to address and implement the HR related diversity issues or the hybridization of practice at different levels of application. Most importantly, examining DM within organizations requires a polysemic and complex meaning of the concept of diversity and controversial discussions around it in different societies.

While the literature draws special attention to managing diverse workforce in terms of backgrounds, nationalities or identities, within the culturally heterogeneous societies, another unclear question is how diversity is understood and practiced in non-Western, culturally homogeneous states, where DM is falsely assumed as a non-issue. While DM efforts in the culturally diverse work environments may be attached to changing organizational cultures and intercultural integration, it may be considered either as fashion or as experimentation in the homogeneous states regarding the awareness-raising problems.

DM does not appear to be largely recognized in Poland, as it is in other immigration societies. The homogeneity of the workforce and the entire society's history may result in attitudes privileging members of a dominant ethnic or national identity, creating a barrier to employment for foreign workers, like it is the case in Japan (Özbilgin, 2005).

This applies to Eastern European countries and Poland in particular.

The region of Eastern Europe is largely underexplored not only in DM research, but also in comparative management literature. In the '90s, Eastern European countries, including the former communist states, were initially confronted with the intercultural challenges of the adoption of management standards, such as HRM and Quality Management. The continuous process of learning from western, liberal and humanistic rhetoric for effective functioning of Polish firms on the international arena is a relatively underexplored phenomenon. Currently, more and more firms in Poland accept and adjust to modern strategies and tools on an unprecedented scale, but they are believed to be far from meeting the demands of western models (Skuza et al. 2013). DM is one example of the plethora of policies and practices exposed by international headquarters to their polish subsidiaries and a good illustration of larger challenges of transfer. From transformation studies, the question is whether the new concept of DM in Poland supports a greater cultural transformation of Polish firms, bringing with it the “western modernization” or on the contrary, the North-American “imperialism”. The second scenario could enhance understanding of cultural change in Poland through post-colonial theoretical framework, by addressing the issues of management dissemination and linguistic domination of English.

#### Impact of personal and professional experiences

DM in Poland is also an interesting phenomenon to study from personal and professional perspectives. The thesis has its roots back to the internship in the French headquarters of the production company in 2015 (firm A), which allowed me to gain a first insight into the Polish resistance to the conventional conceptualization of diversity policy in alignment with the headquarters' expectations and HR corporate policy. The aim of this research from the beginning was to decipher “what the difficulties of diversity management in Polish firms are, from a post-transfer perspective, and what the local context has to do with it”.

The study of DM is particularly interesting for me personally, as I am a native Pole and both my parents are Polish as well. Moreover, I consider myself a “European citizen”. Before moving to France to study, I received my education in Poland and as far as I remember, I was surprised by the promotion of nationalist history and patriotic literature which is still taught to the young

generations in Poland today. I feel connected with my country and its history, as well as the history of my grandparents who have had to flee the country and leave their homes, family and school in the aftermath of the events of the Second World War, and before that, their parents who died trying to run away from the enemy in the First World War. The memory of Polish history is not only a part of the national education (involving reading Romantic literature or learning by heart poems by Mickiewicz for Polish language lessons), but also a part of family life, the stories shared during family gatherings. Also, my father was actively engaged for most of my youth in the activity of the trade union "Solidarnosc" as the head of the regional delegation. It is not something that I could easily erase from my memory.

Yet, I'm part of the Millennial generation and spent 8 years outside my country, first to study in France, then in Ireland where I live today. I feel connected to Polish emigrants, but I would describe myself as a Polish emigrant as well as a European citizen. I am grateful that I can travel and work abroad without restrictions, while being a citizen able to see the value of European integration and its cultural diversity. I was often surprised by the fact that I feel a strong belongingness to my natal country, and that I can look at Poland and its future from a very distanced perspective. I feel very detached from certain aspects of my national culture, especially after the elections in 2015 and the following socio-cultural changes which occurred in different spheres of public life, as I am more concerned by European and global societal challenges and problems of inequality.

The Western/Eastern experience I had over time was marked by increasing access to international education, a desire to build a Polish European identity, especially among the young generation, increasing importance of NGOs fighting for human rights and equality, foreign investments and digital technologies as a form of breaching the gap between the two worlds.

But it seems to me that Poland is a country of paradoxes. I strived to understand the attitudes and behaviours of Polish employees who stayed in Poland and worked for multinational companies, in relation to "otherness" and "foreignness" from their own perspective. Initially, I was interested in diversity management, especially the cultural diversity and confrontations between global and local. But I struggled to match the vision of ethnically homogeneous "Polish Poland" and how it's embraced by Polish employees, with the extent to which organizations opt for western, open and inclusive forms of working. The findings of this enquiry are not



straightforward, for there seems to be a gap between the global, universalist view of DM and the Polish adaptation.

### Thesis structure

The thesis is structured around three main blocs: the theoretical bloc, the methodological bloc and the empirical bloc. First, the theoretical part includes the literature review and the introduction of the research questions.

Chapter One, Diversity Management research, presents an account of the contextualization and transnational studies on DM after transfer, which calls for the consideration of the national cultures of recipient countries. The chapter reviews the literature and starts with the panorama of heterogeneous and homogeneous states where DM transfer occurred. This includes a discussion on specific confrontations of Eastern European countries and other transition economies which have not fully embraced the neoliberal and democratic transition. Afterwards the chapter gives account of the dominant Anglo-American concept of diversity, which dominates the message of western headquarters. The chapter follows up with sectorial and industrial contextualization of diversity management.

Chapter Two reviews the theory of transfer of management practices from two perspectives: the institutional theory and the intercultural transfer in management, which are seen as complimentary. The first section outlines a variety of definitions and phases of a process of cross-national transfer and addresses the most relevant insights from Kostova's theoretical framework (1991;1999;2002). Thereafter, the chapter provides evidence of cultural embeddedness of tools and practices, after they are exposed to new cultural and organizational contexts.

The theoretical part ends with Chapter Three, a brief overview of the demographic, historical, and political background of the country. Most importantly, it highlights the history of citizenship construct in Poland (the distinction between ethnic, national minorities and cultural diversity) and reviews the idea of the Polish national identity creation and reconstruction, which may contradict the fundamental principles of diversity, which are valuing diversity and putting efforts into creating a diverse work environment through recruitment strategy.

The methodological part starts with Chapter Four and highlights the most suitable approach to answer the research questions. The field research was conducted in four Polish subsidiaries of multinational companies in different sectors: energy production (firm A), life quality services (firm B), insurance services (firm C), biopharmaceutical innovation (firm D). The chapter explains the rationale for the qualitative methodology and the constructivist approach, followed by the interpretative paradigm and continues with the circumstances of data collection and analysis, finishing with the section dedicated to research reflexivity.

The empirical part starts with the findings presented in Chapter Five, which provides an objective presentation of diversity policies in all four case studies and continues with the analysis of the diversity management practices at the subsidiary level. The findings draw on the four case studies, but the central part of the analysis is based on the main case study of firm A (energy production firm). The chapter then discusses the convergences and divergences between the case studies, with focus on special implications of DM in a production company, contrasted with other sectors.

The final part is a discussion of the findings and conclusions. The first part of discussion reveals that the concept of diversity is broadened to a new form of international openness, defined as International Diversity Management (IDM), while contradicting the application of DM in HRM such as talent attraction and recruitment. The next part questions whether a limited and contextualized character of policies and actions may be considered as a local success of DM or its failure from an international comparison standpoint and from Polish DM literature. Then, I mention the theoretical, methodological, and managerial contributions as well as the limits and future research. The thesis ends with concluding remarks.

## 1. CHAPTER ONE - Diversity Management Research

## 1.1. Introduction

*“The North-American origins of this concept deem it unsuitable for other national contexts. Therefore, there is a need for context-specific frames to understand how diversity management may work across different cultural and economic settings.”*

(Tatli et al. 2012)

DM research is covered by a large number of studies across various disciplines, from sociology, psychology to business management literature (Jonsen et al. 2011) and is subject to various theories and concepts within management literature. However, it is possible to highlight two main tendencies in the research: universalism (“largely independent of cultural or other contextual influences”, “culture-free”) and particularism (so-called “divergence” or “culture-specific approach” to DM (Pudelko & Harzing, 2006). The universalist approach to DM outlines two benchmark studies which laid the basis for mainstream DM research: the business case for diversity and the four distinct DM paradigms of DM (Ely & Thomas, 1996). Özbilgin (2008) outlined two core research perspectives developed in the mainstream literature: Performance-based perspective and the Equal opportunities perspective discussed particularly within heterogeneous organizations.

An important question is raised by Noon (2007): “If the business case for equality is so compelling, why are not all firms adopting it?” The business case<sup>7</sup> is assumed to reveal the universal approach which historically guarantees an equal status for ethnic minorities regardless of their social position and the current economic environment as well as the organizational circumstances. The management literature focused on cross-country transfers

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<sup>7</sup> The business case for diversity is one provided by Mease et al. (2018) and reflects three main metaphors of human difference: “difference as an asset”, “difference as for a liability” and “difference as a possibility”. The first category sees the business case in terms of the benefits of a group diversity for the business and is associated with non-discrimination in the workplace. The center interest of the second metaphor is people’s relationships, conflicts, and compliance discourse. While the last metaphor is associated with the new discourses and practices in DM, mainly built upon the innovation arguments as well as the integration of people’s differences leading to better collaboration and employee creativity and company’s productivity.

highlights the gap, as it is wrongly assumed that the western practices are perfectly mirrored when they travel from one context to the Polish organizational settings.

Since the 90s when the literature on DM emerged and has become an important subject in the literature (Jonsen et al. 2011), a growing number of scholars started to conduct extensive research in new countries, revealing the importance of the multicultural lens of local environments and national cultures. Following this pattern of heterodox approach, other scholars contributed to the critical perspective in DM research that has been an extremely fruitful area for researchers over the past two decades (Chanlat & Özbilgin, 2017; Christiansen et al. 2013; Kersten, 2000).

Many scholars confirm that the problem is that the headquarters of the Nord-American companies attempt to implement the universal diversity strategies across the subsidiaries, ignoring the fact that DM is to be adapted to the socio-political and historical contexts. These studies undermine the “American dream”, “a hopeless quest for an unattainable Holy Grail” (Cassell & Dick, 2002) aiming to prove that the US corporations are the world leaders in the delivery of successful DM strategies, inspiring other countries. Ferner et al. (2005) argues that the US model of DM is dominant because of the leading business system and the historical roots of management standards. Bendick & Eegan (2010) added that the US headquarters of multinationals might not be aware of political, cultural and environmental problems in the European subsidies while attempting to transfer diversity policies. Pudelko & Harzing (2006) provides a resume of the universalist school of thought and argues the “the right best practices” ignore the economic differences between the more developed countries like US and France, while developing countries (for instance Poland) are supposed to “catch up” and adopt the practices, including the economies which shifted from centrally planned economies to free-market economies.

## 1.2. Definition of diversity practices and policy

“Diversity means different things to different people” (De Anca & Aragon, 2018). Also, the literature provides many definitions and abstract ideas of diversity, using terms like heterogeneity, divergence, variety, dispersion, dissimilarity, separation, (Jonsen et al. 2011;

Harrison & Klein, 2007), a plurality (Noon, 2007). Even though the term of diversity management emerged in the US legal framework in the '90s, it is still the latest buzzword in academic research as well as in the world of organizations of all sizes and sectors (Chanlat & Özbilgin, 2017). Both research and practice, also reveal the variety of undertones and definitions of diversity management initiatives, because they happen locally and are tailored in alignment with the local requirements. This is the core direction of this chapter. However, due to the abundant literature in DM, the chapter does not expand the literature review to all concepts and characteristics embraced in the concept of diversity in transdisciplinary research.

In order to select the most appropriate definition for the present thesis, it seems necessary to choose between the “narrow-category-based” and “broad-category-based” (Mor Barak, 2005) unit of diversity analysis. The “narrow” scope of the term diversity focuses on the specific and visible characteristics of diversity such as gender, age, while the broader scope of diversity analysis embraces the social perception of these categories within groups and organizations and extends the perspective to invisible dimensions which can be utilised in the inter-sectional perspective (Beauregard et al. 2010). This research focuses mainly on a narrow perspective of nationality, but at the same time investigates the deeper layer of its cultural significance within the homogeneous demographic context. Polish scholars (Walczak, 2011; Wojdylo-Preisner & Zawadzki, 2017) define the term diversity in terms of identity and divide it into three main categories: primary identity (for instance, sex, age, language, ethnic origin, nationality, shared values, patterns of behaviour); secondary identity for instance, place of living, traditions, education, religion) and organizational identity (for instance, place in the organizational hierarchy, professional experience, duties, responsibilities, range of performed tasks).

The analysis of the Polish grey literature in the form of academic and press articles, research reports, governmental reports around the theme of “diversity” and “nationality” reveals the utilization of the term “foreigners” and “outlanders” which refer to the territorial dimension of diversity (people from foreign lands). In a broader perspective of the theoretical framework, this research could be associated with the initially recognized concept of diversity which has its roots in the differences between ethnic minorities and different identities, rather than the broader perspective of a diversity of skills and thought which have emerged only recently, since 2000, and does not uncover the deep-rooted problems around DM in Poland. In view of this,

Wieczorek- Szymanska (2017) looks at the neutral definition of diversity recognized in the management literature as “values-based diversity” focused on the invisible characteristics such as “diversity of thought and ideas” which might translate in the workplace as “differences in communication styles, work ethics, and motivational factors”. Jedynak (2016) conducted a quantitative study of DM strategies in Poland and highlighted two types of diversity: primary dimension (inner human characteristics) and secondary dimension (for instance work styles, communication style etc).

While the concept of diversity refers to the visible and invisible human differences, the term “alterity” (Chanlat, 2017; Haas & Shimada, 2014) extends its meaning to the acceptance of the state of being “different” within the given community and often refers to the cultural diversity. The notion of “alterity” is key for this thesis, because it opens for discussion the acceptance as well as openness towards the “other” and therefore allows to avoid the risk of “cultural relativism” which has dominated the mainstream DM research. The concept of alterity should also be subjected to the process of contextualization because it may reveal different issues in each society. For instance, in the French context, the foundations of “otherness” rely upon the principle of the Republican rights to equality, freedom, and justice for all within the French Republic and the respect of “alter” beliefs in the name of the secularism. Therefore, the French understating of alterity is defined as:

*“The acceptance of “other” and the differences in respect of the common vision of community within the organization. Otherness is the foundation of the principle of respect of equality and secularism”.*

(Haas & Shimada, 2014)

There is also a variety of definitions of diversity management, from the generalist definition to a more particularist approach which underlines the even more complex nature of DM. For instance, Mor Barak (2016) advocates for the universalist definition of diversity management:

*“The voluntary organizational actions that are designed to create a greater inclusion of employees from various backgrounds into the formal and informal organizational structures through deliberate policies and programs”.*

Mor Barak (2016)

However, the definition mentioned above is not entirely suitable for this thesis, because the concept of diversity in Polish organizations under study does not underline the purpose of creating an inclusive environment via policies or practices. In light of the interest for contextualization of DM advocated here, the following definition of DM is regarded from three levels of analysis: national, organizational and unitary.

*“Diversity management is a complex, multidimensional concept as a whole. It is a plural term with different perceptions in different organizations, societies and national cultures without any unitary meaning”.*

(Özbilgin and Tatli 2008).

At this point, it is also essential to highlight the definition of diversity policy. Bruna (2016) defines the diversity policy as an organizational measure based on the ethical, juridical, economic and company image motives. For instance, in France the juridical obligations play a key role in the construction of the diversity policy which is based on the premise of the fighting against discrimination, unequal opportunities, so is, therefore, a natural and integral part of the French diversity policies. Polish firms are preoccupied with the legitimization and formalization of general managerial commitments which often ignore the clear French objectives towards non-discrimination and inclusion (Bender et al. 2010). Here, the term “policy” in the context of DM should be contextualized, as it covers different documents and ways to perceive its outcomes in the foreign subsidiaries. The next step is to have a closer look at the second level of abstraction and provide insights into the definitions of the concept of diversity in different national contexts.

### 1.3. Intra-national meanings of diversity (Homogeneous vs Heterogeneous countries)

Question for the literature review

This part is structured around the question: Why the dominant Anglo-Saxon model of DM, initially conceived in the heterogeneous countries, does not “fit” with the reality of homogeneous countries, in particular in Eastern Europe?



In other words, this section focuses mainly on the particularist approach to DM in order to give an account of how the dominant, Nord-American discourse focused on non-discrimination, recruitment and equal opportunity, is not suitable in the culturally homogeneous contexts within multinationals. This question has been addressed by scholars in DM (Nishii & Özbilgin, 2007), but not with regard to the separation between the homogeneous countries of Eastern Europe and heterogeneous countries of Western Europe and beyond.

This concept “travels from one cultural and organizational setting to another”, showing especially the Eastern/Western dichotomy, in particular, the forgotten element of diversity management debate, the contrast between the ethnically homogeneous and diverse countries. The “particularist” approach stresses the importance of going beyond the McDonaldization (Pudelko, 2006) of DM and is sceptical about the idea of the institutional “economic-valued” theory, according to which, the transfer of DM is a smooth and straightforward process in emerging economies as well as in developed countries. However, many scholars use the term “western approach to diversity” (Özbilgin, 2005) suggesting that DM occurred initially and was developed in the western part of the world, North America and countries in West of Europe. However, the interpretative studies are built upon the premise that there are international differences in DM within the western states, for example the diversity policies in UK-based companies are different from the German ones. For this reason, the term of the “western” approach to DM does not seem suitable for the literature review.

The literature review illustrates a geographical panorama of the countries in which the transfer of DM has occurred and has been studied, with the intricacies of the national contexts. The section starts with a few examples of heterogeneous countries that are frequently discussed in the DM literature. The section continues with the presentation of the flagship models of DM: the French and the US model of DM.

Following this, the section will highlight four groups of countries which have been included in the literature review. The first group contain homogenous countries, such as Finland or Denmark, while the second group includes homogeneous countries in Eastern Europe. The section focuses on transition economies and applies the following definition:

*“Transition economy is one that is changing from central planning to free markets. Since the collapse of communism in the late 1980s, countries of the former Soviet Union, and its satellite*

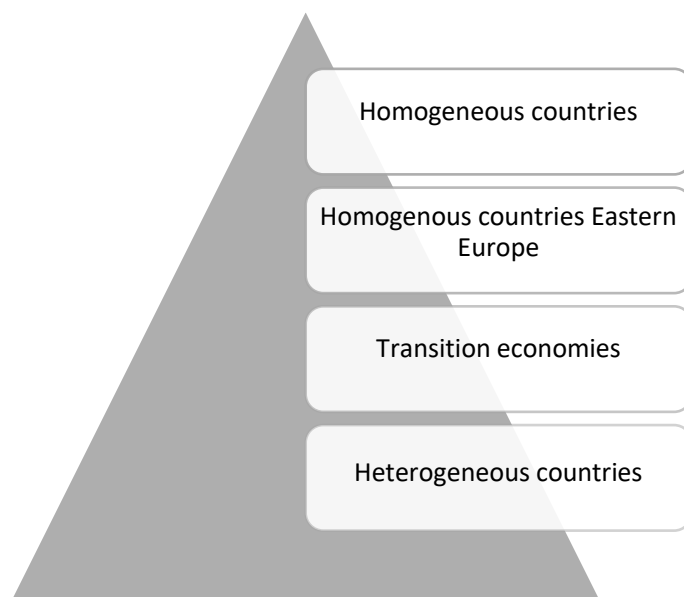
*states, including Poland, Hungary, and Bulgaria, sought to embrace market capitalism and abandon central planning”.*

(Google, 2018)

The last group highlights heterogenous countries such as the US, Canada, France, considered to be the main drivers of Diversity charters (Strzelczak, 2017).

The studies were selected based on two factors: the level of homogeneity (that will be explained further) and the relevant thematic for the thesis. This is because the emergence of DM practices in Eastern European region is explained, among others, by the emergence of human rights policies and the liberal European legislation (Maj, 2017) which only occurred during the last two decades. Scholars mention the unique character of transition economies, as the transformation of different kinds (socio-political, economic, historical) may have implications for the restricted character of diversity discourse and emergence of taboo topics (Shen et al. 2009)

The following figure (Figure 7) illustrates how the next section will be structured.



*Figure 7 The “particularist” Studies in DM per category of the countries. Selected countries only.*

### Definition of homogeneous and heterogeneous

Before starting the literature review, it is necessary to clarify what is meant by homogeneous versus heterogeneous countries or the so-called “immigration societies”. The figure (Fig.2) is a comparative table of the percentage of the national/indigenous population in each country, regardless of the influx of immigration which is currently undergoing a radical change due to people’s migrations in the EU.

Widely recognized, the terms the homogeneous and heterogeneous countries appear not only in the political debate in the context of the migration crisis in Europe, but also in academic debate, for example in economic as well as political studies (Fearon, 2003) and management research (Chanlat & Özbilgin, 2017). However, there is no unified scientific definition of a “homogeneous” and “heterogeneous” country profile. For instance, some scholars attempted to make a list of eleven homogeneous countries and 19 heterogeneous countries within and outside the EU, based on the ethnic societal makeup which combines a wide range of factors such as the immigration rate and the number of ethnic minorities (Alesina et al. 2003). Based on similar methodology of ethnic fractionalization, Fearon (2003) established a list of countries drawing on the size of the country’s dominant population and ethnic demographics and defined a profile of “a homogeneous country” as a country “with an ethnic majority” such as countries of Eastern Europe (Fearon, 2003).

To make a distinction between heterogeneous countries and the homogeneous countries, we simply look at the percentage of the dominant national population. To do so, we draw on the national statistics which reflect the exact numerical representation of nationals, rather than the imaginary social affiliation within the ethnic group.

The following figure presents a panorama of the countries. It seems relevant to mention that there is no “country division” explicitly described in the DM literature. A special focus is on the Eastern European countries (such as Poland, Slovakia, Romania, Czech Republic) which represent an under-researched zone in DM and therefore provide the most relevant insight for the thesis. The international bipolarity perspective is not to be confounded with the attempts to generalize the findings in DM, but rather to structure the literature review and to better identify the empirical gap.

The idea behind the geographical panorama is to show that the experience with DM in the homogenous countries in Eastern Europe is not similar to the dominant conceptualization and experience with DM, as it may appear at first. In addition, culturally uniform states can reveal the differences as well, due to the historical context. For instance, the Japanese experience with diversity is not the same as the Slovakian approach to DM even though both countries are highly homogeneous in terms of nationalities. Also, the case of Bosnia and Herzegovina is an interesting case study of a country located on the Balkan peninsula in south-eastern Europe which is composed of three different “autochthonous” groups, Bosnia and Herzegovina is the country composed of three autochthonous constituent nations- Bosniaks, Serbs and Croats- and none of them can be considered a minority or immigrant. Although the country has 17 other ethnical minorities, the fact that the three main nations account for more than 96 percent of the overall population, makes Bosnia and Herzegovina a homogeneous country.

| Category                               | Country                                                                              | % of the national population                                                                                                                                                                                                                                            |
|----------------------------------------|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Heterogeneous countries                | France                                                                               | Descendants of immigrants born in France (1/4 of French have a grandparent born outside France).                                                                                                                                                                        |
|                                        | USA<br>Australia<br>Canada Brazil<br>Cameroon                                        | Hispanic and Latino Americans, Afro Americans (Difficult to assess)<br>92% white, (27% of Australians born outside Australia (Fenwick et al. 2011)<br>23% British and 23% French other European 15%<br>53,7 % white<br>38% of People from Western Highlands and others. |
| Homogeneous countries                  | Finland<br>Germany<br>Denmark<br>Japan<br>Austria                                    | 93.4 % Finnish<br>91,5 % German<br>80,7 % Dutch<br>98,5 Japanese<br>91,1 % Austrian                                                                                                                                                                                     |
| Homogenous countries<br>Eastern Europe | Poland<br>Bulgaria<br>Romania<br>Slovenia<br>Czech Republic<br>Lithuania<br>Slovakia | 96,7 Polish<br>80% Bulgarian<br>89,5 Romanian<br>83,1 % Slovene<br>95 % Czechs or “Moravians”<br>84 % Lithuanian<br>80,7 % Slovak                                                                                                                                       |
| Transition Economies <sup>8</sup>      | Kazakhstan<br>Bosnia and Herzegovina<br><br>Russia<br>Kazakhstan                     | 63.1 % Kazakhs, 23,7 % Russians<br>3 ethnic groups: Bosniaks (50%) Serbs (30%) and Croats (15%)<br>=national population<br>91% Russian<br>Two ethnic groups: 66,6 % of Kazakhs and 20% of Russians                                                                      |

Figure 8 The categories of the countries included in the literature review.

<sup>8</sup> Country classification according to WESP (World Economic Situation and Prospects, 2015)

## Homogeneous countries

Multiple scholars in the field of diversity management acknowledge the unique character of a strategic DM agenda in the companies located in relatively homogeneous contexts, in terms of the number of the national population, like Denmark, Finland, Germany, Japan.

The case study of the German subsidiary of an American manufacturing company (Vassilopoulou, 2017) which has signed the Diversity Charta and adopted a Diversity Management agenda from the headquarters, shows that the real issues such as racism, and discrimination and equal opportunities are omitted in the German organizations as well as in society. The main reason for the failure of DM is the post-war and post-holocaust national guilt (Vassilopoulou, 2017) being a result of Nazi history. The so-called “symbolic violence” against ethnic minorities, especially Turks, brought into light the notion of “integratism” defined as “*the racial biased, ethnocentric notion of integration,*” (Vassilopoulou, 2017) which diminishes the actions of diversity and equality management in Germany. This study is particularly interesting, as it shows that the term of DM is not historically neutral and can be overlooked not only in the homogeneous countries with the lowest immigration rates in Europe like Poland or Hungary, but also in countries with a growing immigration rate like Germany.

Drawing on the study of Ely & Thomas (1996), Podsiadlowski et al. (2013) conducted two surveys in Austrian organizations and identified five main diversity perspectives: Reinforcing Homogeneity, Color-Blind, Fairness, Access, and Integration and Learning. For instance, the phenomenon of “Reinforcing Homogeneity” means avoidance or even rejection of the idea of a diverse workforce in order to privilege the homogeneous workforce, which may be, for instance, composed mostly of native ethnic groups. It seems interesting to mention that the effects of DM agenda in Polish subsidies may paradoxically lead to the avoidance of DM in the HR practices which therefore objectively reinforces homogeneity.

The study of Subeliani & Tsogas (2005) showed that the policy focused on multiculturalism was met with a wave of reluctance, in local branches of the Rabobank in the Netherlands. This particular case shows that the Nord-American idea according to which any type of diversity fosters innovation, performance and competitive advantage of the companies in any circumstances regardless of the industry and the size of the company is a far-fetched

statement. The Rabobank successfully adopted the Diversity policy aiming to attract ethnic minorities to the company, which reflects the diversity of customers, in order to increase the sale of the financial products. However, the transfer to the regional branches was met with backlash, a few local branches located in the rural areas were reluctant to the idea of hiring Moroccans, Turks and other ethnicities.

Another study based on a survey and two case studies of Danish companies revealed that the majority of companies do not apply the diversity policies, as diversity is not considered to be “a big issue” (Boxenbaum, 2006). The British concept of DM had to be translated in order to make sense locally. Instead of the AA (Affirmative Actions), the findings demonstrated a combined approach of DM: the business case for diversity and the CSR (Boxenbaum, 2006) strategy aimed to help disadvantaged groups of different ethnic origins.

Sippola & Smale (2007) studied the organizational attempts to transfer “the corporate talk” on the global diversity management seen as the strategic HR initiatives from the host-country, the European multinational and SME, to the subsidiary -level in Finland. The study reveals that the company put pressure to adopt the philosophy of the Anglo-Saxon idea of the business case, but has failed to adopt the common ground of diversity policies and practices. The local managers accepted few neutral practices in the area of Benefits & Compensations (HR) or employee training while the quotas were rejected. The study used the model of Kostova (1999) to show that the integration of global DM was a particularly painful experience and was met with resistance at both levels, the practice-implementation and the people's beliefs in what is right to do and what is not. One of the biggest challenges was to convince the Finnish people to implement DM which may also lead to the employment of immigrants and to explicitly discuss people's differences “at open space”, which they preferred to avoid.

Özbilgin (2005) studied the motives for the adoption of global DM actions in the automobile industry in a highly homogeneous environment in terms of nationalities, such as Japan. According to Özbilgin (2005), one of the major differences between the Japanese approach to DM and the model from Western Europe and North America is an inherent capacity to reunite the visions of the key stakeholders of diversity which is more challenging for Japanese organizations where tensions and conflicts persist for instance between the trade unions. Data from the interviews showed that the Japanese firms adopted a multinational model of diversity which has its limitations and thereby contradicts the principle of valuing difference advocated

by the western and Nord-American discourse of diversity. The information about the composition of the workforce suggests a preference to attract a homogeneous pipeline in the recruitment process and attribute a high management position to the male candidates of Japanese origins, rather than ethnic minorities and women. The homogeneity of the workforce is not only the important effect of domestic demographics but also reveals a form of diversity resistance, a shared belief in the superiority of the Japanese ways of working which cannot be fully understood by foreign nationals.

Even though this section focuses mainly on European countries, Japan is an interesting case study being one of the most populous and homogeneous countries with a high number of foreign residents (2.22 million in Japan (1.76% of the population in 2018) where Japanese multinationals have borrowed the concept of diversity management from the Western counterparts. As it will be shown in the next section, there is a disparity to DM approaches within the homogeneous countries, as DM policies in the countries of Eastern European region are under the influence of the European legal framework and deal with different institutional diversity management stakeholders (Maj, 2017). This brings us to the next section on the homogeneous states in Eastern Europe. The homogeneous countries in the CEE region

Despite the scarcity of DM research in Eastern Europe, there are few studies which demonstrate the contextualization of DM in the countries of the Visegrad group, such as Poland, Check Republic and Slovakia. Yet these studies have important methodological limitations, as they draw mainly on the statistics and surveys rather than the qualitative case studies and interviews with the local people, and do not reflect fully on the complexity and the limits of DM.

For instance, Lančarič, et al. (2015) studied the circumstances in which occurs the process of DM implementation in small and big multinationals in Slovakia, such as the legal form (number of owners), the business organization, the size and share of the foreign capital. The authors found that big companies are likely to implement a DM agenda and therefore the attitudes towards DM are much more positive in organizations with an important share of foreign capital of ownership. In other words, they argue that the emergence of DM in Slovakian organizations is a result of the western influence, through the influx of multinational corporations, but there has been little or no evidence of how DM is developed and perceived by the local management.

Other scholars (Eger & Indruchova, 2014) attempted to describe the perception of DM in companies in the Czech Republic by a group of respondents working in HR, considering the level of education, management level, and the length of their work. The study showed that none of the variables have an important impact on the perception of DM. Yet, one of the positive outcomes of the study is the fact that few respondents “are already familiar with the issue of DM” and the familiarity with the concept of DM is considered in Czech companies to be an important first step in addressing the DM agenda. This conclusion suggests that these organizations are closer to an infancy stage in the model of organizational maturity in managing diversity (Wieczorek-Szymanska, 2017) even though the study does not provide strong evidence of managerial experience with DM.

The study of Egerova et al. (2012), based on the questionnaire aimed to understand the adoption of DM in Czech and Slovak companies, shows that the managers are more likely to have a positive perception of the equal opportunities as compared to the ordinary employees at lower levels of management. Furthermore, they use neutral terms such as “regardless of age and gender”, having the preference for fair treatment in general. The reason behind the positive managerial perception appears to be the reluctance to admit failure, as managers have the whole responsibility for the implementation of DM and even though they do not believe in the idea of explicitly “valuing diversity”, they comply with the organizational requirements, since it is a part of their “job”. Also, the willingness to employ a diverse workforce on the ground of ethnicity was identified in the multinational companies, while other Slovak and Czech organizations were reluctant to the employment of people of different ethnicities. However, the lack of in-depth analysis does not allow to fully understand the real reasons of the forms and the nature of resistance nor the positive alternatives for assimilation of DM policies.

These studies rarely praise the benefits of DM exclusively for the Slovak and Czech people and organizations. In the light of this thesis, it is not surprising that the authors highlight that DM is a superficial concept, as the signatory companies of the Diversity Chart seem to overlook the benefits of DM according to the business case for diversity scenario and therefore the lack of awareness of broader diversity-related topics.



The lack of awareness about DM is also identified in the Slovenian organizations (Ogrin, 2015). This is another study, based on a questionnaire and Diversity scale, which provides the practical recommendation for Slovenian firms, arguing that they should focus on establishing of the openness to diversity, a culture of acceptance and promotion of diversity values in order to instil the positive attitudes towards the overall concept of diversity, as well as introduce a monitored HR people trainings and diversity events (Ogrin, 2015).

The research suggests that diversity management started to play an important role in multinationals located in Eastern Europe, but the efforts have been primarily focused on the awareness-raising initiatives and implementation of the policies at compliance level. Therefore, there is evidence that the adoption of DM in Eastern European-based organizations requires a process of learning from western counterparts and the progressive “step by step” approach to advance the DM agenda. Finally, DM research in Slovakia and Czech Republic study diversity management at the perception-level at higher levels of organizational hierarchy as well as diversity/performance issues, while the factors influencing the transfer of DM are ignored (Lančarič et al. 2015).

While the companies in the EE countries, the so-called Ex-bloc countries, are “catching up” the more developed western countries (Wieczorek-Szymanska, 2017) in DM, a greater attention should be paid to the transition economies or the so-called “emerging economies” specifically in Eastern Europe, as these countries have not shifted fully from central economies to liberally planned economies and have not fully benefited from the process of globalization and democracy and associated international standards. Also, according to the World Bank categorization (2015) transition economies are “low-income countries where the standards of living are relatively low and the social insecurity persists in the long-term run”. Most importantly, conversely to the group of homogeneous countries in the EU, the transition economies mentioned in this section are not members of the EU. Finally, in the transition countries not only is the free market economy emerging, but also diversity management, as it will be discussed further.

## Transition economies

The section starts by giving an account of the question of why the experience with DM in the transition economies merits attention. Considering the current ongoing process of transition, how do the ex-soviet countries deal with the recent phenomenon of diversity management? According to Lančarič et al. (2015), there is no study on the implementation of DM applying a lens of transition economies of Visegrad group.

In addition to the ideological and social issues of transition, from an economic perspective, transition economies are basically ex-communist countries called the “Eastern bloc” or Post-Soviet countries which have changed from a centrally planned economy to a market economy. Yet the sense of the term transition goes far beyond the economic point of view. Today, more than 20 years after the abolition of communism and more than a decade after the EU membership, transition countries seek major developments to converge with the European standards (Blokker, 2005) and the problems they face due to the “transition” appear to be somehow ignored in management studies, including DM research. Some scholars argue that it is wrongly assumed that the Eastern European standards easily converge with the western models of management (Skuza et al. 2013).

Blokker (2005) defines the process of transition as:

*“a modernization and social change in Eastern Europe” [...] that emerged after the collapse of the communist regimes, the normative affirmation of the Western modern project has been a diffused, but mostly unproblematized element”.*

Blokker (2005)

For instance, a diversity report by the Polish NGO (Gryszko, 2009) suggests that Poland is “a post-war country and a market economy, where DM emerged only after the transformation” (2015). Also, the report provides a citation of one of the HR Directors responsible for CSR in a Polish firm which suggests implicitly that the level of maturity of DM in Poland cannot be understood without taking into account the transformation past, arguing that:

*“You have to grow up to perceive DM. At the beginning of the '90s, when our company entered the market, who would think of diversity? What diversity? Or even work-life balance? Everyone*

*had to work hard to be competitive [...] After 20 years of transformation, diversity somehow starts to emerge for us as well”.*

(Gryszko, 2009).

It is interesting to mention that the organizational DM agenda inscribes, according to some scholars, in a neo-liberal ideology in management research (Grice, 1995) which tends to “create a new form of liberalism and free-market capitalism” (google definition, 2019). It is argued that the so-called “liberalization” of management practices and the emergence of the neo-liberal values praised in the workplace occurred as a result of different forms of the transition process in the CEE region. One could assume that if DM is an example of the liberal ideology which appeared two decades ago, this may explain why the companies located in the CEE region, including Polish companies, are lagging behind in international comparison. For instance, DM in the area of HRM can be considered as a means of the employment policy to ease the recruitment of individuals who are more likely exposed to exclusion and discrimination. Although the Eastern DM agenda does not reflect the HR management and recruitment quotas, one of the effects of the transition period is precisely the alleviation of employment rights (Kapelyushnikov et al. 2011), for instance in Russian firms.

For instance, Lančarič (2015) argues that a process of hybridization of the HRM system and multicultural practices including “a diversity of values” in the context of the “European Transitional Economies (ETEs)”, such as Poland or Bulgaria, need a closer look, as it may reveal the complexity of the past “paternalistic” less flexible style of management inherited from the socialist era as well as the administrative decentralization. Also, it is suggested that currently, the recent regulatory environment may indirectly instil organizational resistance to diversity. The study argues that the process of hybridization is a process which reflects an external social and institutional evolution and liberalization of the societies which were formerly part of the Soviet Union. It seems that diversity management is an important part of the process in the workplace. The last insight is very interesting, as the author suggests that the HRM practices in the “ETEs” may differ significantly from the US headquarters policies due, for example, to the influence of the EU regulatory context, national legislation and different patterns of economic growth.

Another example of DM in a transition economy with a communist past is Russia (Ruth et al. 2005), which is considered, at the same time, to be the most ethnically diverse country in Europe. Similarly, to Poland, the DM agenda is a relatively new topic in Russia and therefore is a result of multinational companies and NGO's activity, attempting to include DM discourse in the CSR (Kapelyushnikov et al. 2011). The research suggests that the business case for diversity is not well recognized nor appreciated by the Russian managers who focus instead on the critical areas of HR management and talent attraction is not part of it. Data from the 16 interviews with HR managers showed the evidence of local resistance to talk about ethnicity, nationality and religion and diversity being considered as a taboo topic. Furthermore, similarly to Poland, Russian organizations and the national migration policy use the term of "foreign workers", which according to the dictionary is a synonym of "a guest worker" indicating a temporary character of the stay and work of the individuals, rather than the permanent stay and associated with intercultural integration. Finally, similarly to the current Polish case, the Russian case shows that the anti-discrimination legislation exists in communist countries, but organizations often omit these issues in the employment sphere or treat the topic superficially.

Velinov (2018) investigated external data (website, codes of conduct) in terms of differences in the implementation of DM at the headquarters level of the US-based pharmaceutical companies and their subsidiaries in Central and Eastern Europe and argued that the DM measures of the headquarters are ignored in the local DM corporate agenda. The author argues that the global-local differences or even the complete lack of the DM practices, for instance in an ex-communist country like Russia, stems from different macroevolution and "historical economic development of the region" and different political pressures and the socialist past. In terms of the political burden, the countries of the CEE region do not have the same political directives and legal framework in terms of non-discrimination or social protection of different groups such as the LGBT community, ethnical minorities etc, as these social and political measures were prohibited in the post-soviet countries during the communist era. From an economic standpoint, there has been a shift from the Post-Soviet model of management (Brewster, 2007), characterized by a strong centralization of the administration and business decision-making, to decentralization of management. There has also been a shift from "a unitarist to a more pluralist system" advocated by the DM.

The study of Bešić and Hirt (2014) on the transferability of the concept of DM (HR practices and employment practices in terms of ethnical minorities) from the Austrian headquarters to the subsidiaries in Bosnia and Herzegovina shows that the study of the contextualization of DM practices should go beyond the managerial perspective and provide a “holistic approach”, an in-depth analysis of the employees perspective. Drawing on the interrelation model of DM (Özbilgin & Syed, 2009) and the DM paradigms of Ely & Thomas (1996), the study revealed the absence of the HQ’s practices focused on ethnicity at the subsidiary level and the lesser significance of the overall approach to DM. The subsidiary rejected the HQ’s attempts to establish the corporate DM programs, which is a similar case scenario to the empirical findings in the present thesis regarding the production company, where the corporate D&I dashboard was also rejected and the HQ’s attempts became unsuccessful. One of the reasons behind the limited transferability of DM is the “overall negative” attitude towards the new phenomenon of DM and the inadequacy of the Austrian approach designed to attract ethnic minorities with Bosnia’s model of integration of the constituent nationalities.

Building on this, the present thesis highlights the importance of the consideration from non-HR and non-diversity managerial perspective. The major difference between Bosnia, and Herzegovina and other heterogeneous countries is the fact that the country is a part of a group of transition economies. Bosnia and Herzegovina have gained independence from the former Yugoslavia in 1992. One of the recent transition effects can be reflected in the difference in the legal European framework and the non-discrimination framework which emerged in Bosnia and Herzegovina only recently. Besides, Bosnia and Herzegovina is still not a member of the EU, which may explain the range of difficulties in the implementation of the western DM policies and the “stickiness” with an old management system excluding diversity management.

Last but not least, it seems noteworthy to mention the case study of the Republic of Kazakhstan, which is particularly interesting even though the country is historically highly heterogeneous in terms of religions and nationalities, but was also a part of the Russian empire so-called “the Kazakh Soviet” in 1936 and today is known as an independent state Kazakhstan. The study by Kim Cheng Low (2006) examined the value of diversity in the workplace. Kazakhstan is not considered a transition economy, but the authors suggest that DM can help bring a greater openness from different angles such as flexible management styles or the so-called “openness to foreigners”. Furthermore, the findings from the focus groups show that

the “effects” of the collapse of the Post-Soviet era intervene with how DM is perceived as well as the openness to foreigners and the visions of the foreigner’s inclusion in the workplace. This may be influenced by a greater opportunity to travel which is offered by a free market and globalization (Kim Cheng Low, 2006).

### Heterogeneous countries<sup>9</sup>

Although the following section provides insights into the heterogeneous countries that are of secondary interest for this thesis, the literature review is built on the following question: How did the American concept of managing diversity failed its initial purpose in culturally heterogeneous national contexts?

Ester de Freitas (2017) studied how a diversity in Brazil is included and valued in public (social rights) policies and the organizational agenda. There is evidence of the emerging Affirmative Actions in Brazil, but one of the major differences with the US model is that the ethnical counting does not apply to the physical characteristics, but the process of a self-declaration. According to the study, Indian people account for 0.47% of the indigenous population and have a double identity belonging to the nation and belonging to the specific tribe. Brazil is an example of a highly heterogeneous country, where the AA (Affirmative Actions) approach to ethnic quotas is not locally appropriate, due, among other contextual particularities, to the extremely high regional ethnicization and the distinction between the aboriginal peoples and ethnic groups that appeared more recently, mainly as a result of colonization.

Another study of a highly heterogeneous environment is the example of Cameroon which is composed of more than 200 ethnic affiliations related to the tribes, and the common ancestry and a variety of languages and religions. Apparently, the positive actions have different denominations and reflect the regional diversity, "regional quota", "regional balance" (Kamdem, 2017). The authors give an account of other dimensions which illustrate the geographical and demographical diversity, suggesting that DM should take into account the

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<sup>9</sup> Despite a large interest in DM in the heterogeneous countries, we provide the evidence of a few examples of Brazil, Cameroon, Australia, and Canada.

situation of the indigenous populations. Cameroon is a third-world country and appears to lack some of the characteristics of developed western economies, which impacts the recognition of the categories of diversity. For instance, one of the hidden dimensions of diversity management is the level of family income, so-called "difficulties of human capital": education and health, the absent dimensions of the "western" umbrella of DM.

The statistical study of Australian organizations shows that DM is not universally recognized and that there is a lack of interest for DM, especially among the non-HR employees (Davis et al. 2006). The survey showed that even though there are diversity programs integrated little by little in some organizations, in general, DM is not the priority and the employees do not see the clear reasons for advancing the DM agenda. The reluctance of non-HR employees to DM is determined by a disconnected employee activity, because DM is not an integral part of their daily activity.

Dupuis (2017) examined the situation and experiences of ethnical minorities, mainly the Maghrebians and the French in Quebec in the area of employment integration. Dupuis (2017) provides an example of one of the private companies which failed to adopt the Employee Assistance programs, designed to help whistleblowing cases of discrimination. The Gaz Metro company took 16 years to implement the program and has finally adopted it due to compliance requirements.

#### Heterogeneous countries - The models of DM: The French and The US experience

The following section provides a comparison of DM within two heterogeneous countries such as France and the US, which have been largely covered by DM research presented in the figure below. The aim of this section is to reduce the scope of a large existing literature and to provide a few main features of the models of DM (Özbilgin & Jonsen, 2014) adopted by France and the US. The French model is particularly relevant, as the thesis draws on two Polish subsidiaries of French multinationals (Firm A and B). The Anglo-Saxon approach is noteworthy because it demonstrates the non-appropriateness of the mainstream approach and the so-called "best practices" of DM in Poland. Also, most interpretative studies mention the foundations and the

motives for the original version of DM to better illustrate the variations between the western countries.

| Dimensions                          | References                                                                                                           | Anglo-Saxon model of DM (The US)                                                                                            | French model of DM                                                                                                                                               |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Historical background               | Dick & Cassel, 2002<br>Shimada & Haas, 2014<br>Chanlat, 2017                                                         | The AA (Affirmative Actions)<br>EEO (Equal Opportunity)                                                                     | European Legislation<br>Report of Institute Montaigne<br>Diversity Charter (2006)                                                                                |
| Source of diversity policy          | Özbilgin et al. 2008                                                                                                 | Low State intervention <sup>10</sup><br>The Business case for diversity                                                     | National policies<br>National collective agreements<br>(strong state intervention)                                                                               |
| Historical logic for adoption of DM | Sanders & Belghiti-Mahmut, 2002<br>Cornet et al. 2013<br>Doytcheva, 2007<br>Bruna, 2016                              | From ethic/legal logic to strategic advantages<br><br>“Communitarianism” in view of repairing the history of discrimination | Ethic logic viewed as the universal value which requires neutrality and rejects “essentialization”                                                               |
| Implicit Integration model          | Mutabazi & Pierre (2008)                                                                                             | Meritocracy<br>Multiculturalism<br>Inclusiveness<br>(affinity groups)                                                       | Color-blind<br>Assimilation and national cohesion<br>Common identity (Republican principle)                                                                      |
| Used terms                          | Sanders & Belghiti-Mahmut, 2002<br>Mutabazi & Pierre, 2008<br>Rapport Institut Montaigne (Sabeg & Méhaignerie, 2004) | Used terms interchangeably:<br>Ethnicity, Race                                                                              | Prohibited terms: ethnicity, race, skin color, origins<br>Accepted terms: Majority vs. minorities<br>Diversity of national cultures (collective) or “immigrants” |
| Different tools <sup>11</sup>       | Zannad & Stone (2010)                                                                                                | Numerical representation of diversity<br>Others (HRM)                                                                       | Lack of ethnic statistics,<br>Anonymous CV<br>Employment statistics<br>Others (HRM)                                                                              |

*Figure 9 The French and the US models of diversity management. Selected dimensions only.*

## The US model of DM

A few decades ago, the Anglo-Saxon model of diversity (Özbilgin, 2005) emerged as equal opportunity and affirmative actions (Sanders & Belghiti-Malhut 2011; Shen, et al. 2009) and has its roots in the American legislation (The Civil Rights Act of 1964) related to the historical discrimination of ethnic minorities. In view of this, the mainstream literature highlights the dominant discourse which prones to embrace the ethnically heterogeneous and multicultural reality through the inclusion of ethnical minority groups. In the Anglo-Saxon discourse, the



term of race highlights the target groups in D&I (Diversity and Inclusion) strategies, that were historical victims of racism (Vassilopoulou, 2015) such as Black people and Afro-Americans in the US.

The AA (Affirmative Action) consultants attempted to shift the focus from the moral non-discrimination message to the organizational performance driven discourse and “return on investment” for diversity (Cox & Blake, 1991). The initial definition of affirmative action can refer to admission policies aiming to *“evaluate their own workforces, specify goals for the fair representation of women and minorities based on labor market analyses, and sketch timetables for achievement of these goals”* (Dobbin & Kalev, 2006). Ely & Thomas (1996) views the organization as engine which burns gasoline, where Affirmative action is one of the means to make the engine even more performant, as it gets *“the new fuel into the tank, the new people through the front door. Something else will have to get them into the driver’s seat”*.

For some French scholars, *“The affirmative action means to make of a company a sample of employees from a specific geographical area in which the company takes place within”* (Mutabazi & Pierre, 2008, p.106).

This brings us to the implicit cultural assumption of the principle of meritocracy which is the opposite of positive actions and therefore has dominated the US work environment.

Meritocracy means that the one who is performant, merits his own place at the table as well as the retribution (financial or social), regardless of the inherent characteristics of diversity. This is what Mutabazi and Pierre (2008) call the colour-blind model of DM which brings even more inconsistency and lack of clarity into an already abstract meaning of diversity and diversity management.

The principle of “essentialization” consists of explicitly pointing out the origins of the members of affinity groups, “seeing them as uniquely different”, leading to the establishment of affinity groups such as LGBT groups or ethnic minorities etc. For instance, in the book on HR Management (Cornet & Warland, 2008) provide a definition of “communitarianism” based on a principle of ethnocentrism or sociocentrism and highlights its double aspect, that of cultural cluster (closeness) in one particular cultural context or a cultural group and the openness to “other” and the human difference.

In terms of the management tools, in addition to the diversity statistics, the literature has drawn attention to a wide range of HRM related diversity practices. These practices include: policies, statements, diversity KPI's and board, performance criteria, diversity skills and awareness trainings, networking and affinity groups, diversity task forces and culture audits. The list of tools is not exhaustive and other tools may be identified in the literature. The idea is to mention the representative tools that highlight the contrast between the US and France.

While race refers to the self-identification with social groups (American, Asian etc), ethnicity means only whether a person is identified as Hispanic or Latino or Non-Hispanic (United States, Census Bureau, 2017). For instance, the US national census bureau identifies both terms- race and ethnicity- and considers them as two distinct concepts, which are interchangeably used in corporate statements, without distinction, using the intersectional model of "race and ethnicity" for identification with more than one race (Black+). The French model of DM does not recognize the term of "race" which is taboo and from ethnic standpoint, it does not allow people to identify with more than one ethnicity (for example, there is no category French+ which would describe "French and Moroccan or French and Tunisian"). This brings us to the next point, the French model of DM.

### The French model of DM

The roots of DM in France draw mainly on European legislation such as The Diversity Charter as well as the multiple institutional actions leading to the emergence of national collective agreements (for example, les accords sur l'égalité professionnelle, les accords en faveur de l'emploi des travailleurs handicapés, Ministère du Travail, 2019). The emergence of DM in France has also its roots in the establishments of the Halde (High Authority for the fight against Discrimination and for Equality) as well as other public bodies (Chanlat et al. 2013).

Assimilation of ethnic differences is considered to be a social taboo, as the main priority is given to the discourse of social and cultural diversity. Some scholars shed light on the question whether the issues of ethnic differentiation are obscured in the social and political debate? Unlike the multiculturalist approach, the assimilationist model of integration of diversities requires immigrants to perfectly integrate into the host society, without pointing out the victimization or the issues resulting from the ethnic differentiation (Mutabazi & Pierre, 2008).

Another hypothesis consists of saying that the process of assimilation does not mean to erase all ethnic peculiarities, as assimilation is rather “derived from the application of the principle of equal rights and opportunity for all” (Institut Montaigne, 2004) which presents an added value to the model of integration in the French society, in particular regarding the French Maghrebi<sup>12</sup> minorities or Black community.

Chanlat (2017) pointed out that the idea of ethnic quotas or even gender-centered policies meet a huge wave of criticism in French society, as the workplace should indeed promote diversity, but with respect to the French principle of equality, according to which all citizens are equal regardless of any criteria of difference such as gender or ethnicity. Another problem with quotas is the fact that it leads to the deep reconsideration of oneself which can bring even more problems related to individual and social identity. Furthermore, the construction and regulation of citizenship is used to preserve the “national unity” (Chanlat et al. 2013) of the French Republic which prevails the assimilation of human differences as well as the construction of a common culture, which may be translated into the principle of secularism and a common administrative language (French). Moreover, the French conceptualization of equality, for which France is recognized worldwide, can remind the historical and anthropological foundations of citizenship which may intervene in organizations with the concept of “living together” in the organizations and impede the ethnic differentiation or even, according to some critics in management, to perpetuate the ethnic inequalities.

Therefore, the principle of “colour blind” is actually a part of the Constitution of 1958 which states that all citizens, regardless origins, race or religion, are equal in law (Amiraux et al. 2008). Yet, the “colour blind” phenomenon has a double aspect. On one hand, the French model ignores the ethnic or racial recognition of people, but also the refusal of the common usage of the term “minority”. (Klarsfeld, 2009) argues that there is another reason for the rejection of ethnic statistics. In contrast to the Anglo-Saxon model, it is forbidden by law to collect statistics referring to “ethnic origin”. Positive actions are adopted in France only in terms of disability and this only in particular circumstances such as the size of the organization.

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<sup>12</sup> According to the Institute (2004), there are four generations of African-Maghrebi in France and two generations of African people. Therefore, these ethnical groups account for 12 % of overall population. The French of second and third generation are recognized as “French” in front of the law. However, it is argued that these groups are not recognized as “fully” French from the perspective of social equality, which means “the remedial approach to equality” (Institute Montaigne, 2004).

Considering the terms of race and ethnicity in the French context, the term “ethnicity” or the adjective “ethnic” does not mean race or racial characteristics of an individual, as it is shown in the US context. It reveals rather a subjective process of self-identification with one or more than one’s origins (Mutabazi & Pierre, 2008, p. 41). The authors explain that the Black community is not considered as a separate ethnic group with regard to its cultural or even physical characteristics.

This section demonstrates the historical and cultural foundation of the associated concepts of diversity management which are, according to many scholars, different in both countries (Chanlat, 2017). For instance, Schnapper (2004) argues that DM in France does not exclude the idea of a multicultural society, but points out that in contrast to the US public debate, the multiculturalist discourse has never been a part of the political discourse in France. Also, the extensive research in DM regarding both countries (Jonsen et al. 2011) confirms the hypothesis that a deep understanding of diversity management requires examining deeper layer of the national contexts, referring to the anthropological and historical insights, instead of focusing solely on a surface-level picture of national politics and demographics.

If diversity management, in particular the issues of ethnic representation pose significant organizational and institutional challenges in the heterogeneous countries with a long tradition of ethnic history and colonization, homogeneous countries on the ground of nationality<sup>13</sup> are not separated from the world in terms of facing the current migration and globalization challenges and may therefore face important but different issues related to diversity management. Also, Eastern European countries like Poland, Slovakia, Romania have a different historical and cultural heritage and, for example, do not have a long history of democracy, neo-liberal politics of freedom and equality, which constitute the foundations for the western debate on diversity management. Yet, despite the importance of this phenomenon in these countries, the CEE region triggers little interest in DM research and international publications in management as compared to other countries.

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<sup>13</sup> Not to confound with term “ethnicity”, as homogeneous countries may have a strong cultural heritage of ethnic or national minorities which do not necessarily count as widely recognized concept of “diversity”.

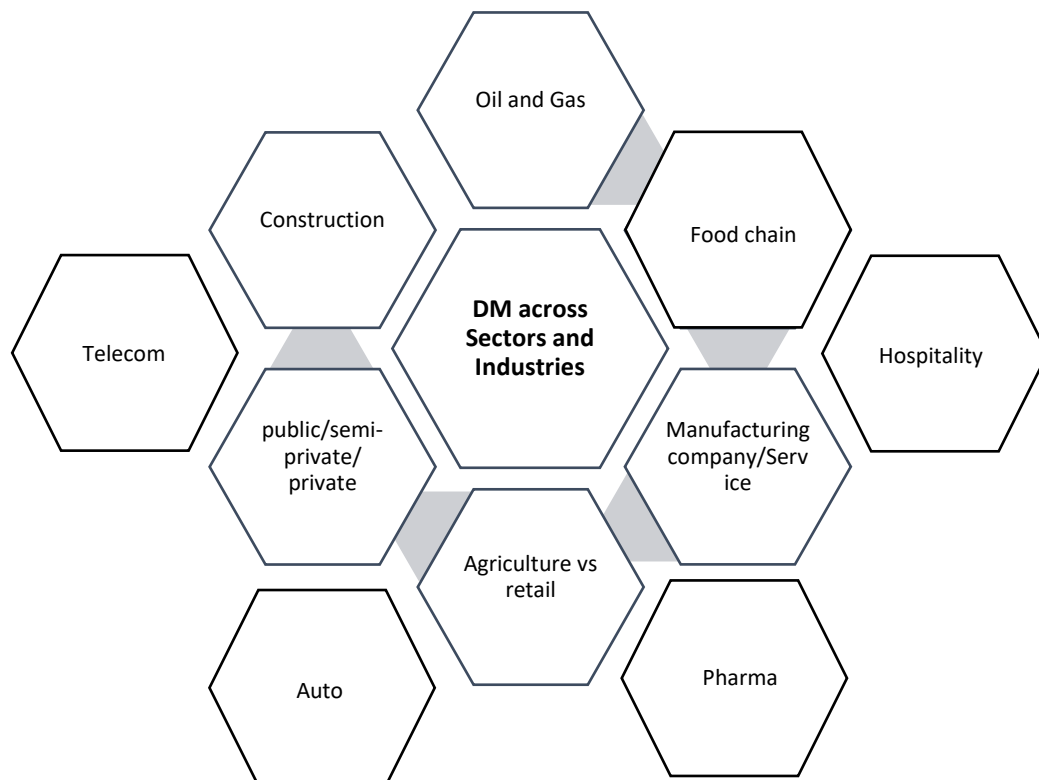
#### 1.4. Sectorial and industrial contextualization of DM

The proactive approach of “valuing diversity” (Ivancevich & Gilbert, 2000) gained an important interest in the US workplace and therefore is largely discussed across all types of organizations of different sizes, activities, legal statuses and business objectives. While some scholars in the field suggest, based on the empirical evidence, that there are effects of industrial contextualization in relation with DM inconsistencies and failure, others use the industrial lens, but it is of secondary interest. For instance, Fenwick et al. (2011) call for the extension of DM research across sectors and industries. Although both terms (sector and industry) are frequently used in DM research, the section focuses mainly on the sectorial lens, as the scope of the research pertains to identify the firm’s specific activities, without breaking down the industry analysis, which would require to list the related services of the firms, such as production, technology, transport etc.

One could assume that the sectorial differentiation may implicitly suggest the generalizable models of DM according to specific sectors. However, the generalization of the findings is not the objective of the literature review. In fact, it has the opposite objective which is to give an account of the “failure” of DM which may be determined to a certain extent by the significant aspects related to the specific firm’s activity. Drawing on the empirical findings, the following questions were designed to structure the literature review, such as:

1. Is there evidence of differences in DM between the production companies versus other, more creative industries?
2. Is the organizational or employee resistance more perceptible in some sectors than in others?
3. Is there a clear divergence between public and private sectors??
4. Is there a distinction between the HR and non-HR employees' perception, in particular between the white-collar workers, the blue-collar workers and operative employees?

The figure below (Figure 10) displays the sectors and industries (depending on the study) treated in this sub-chapter of the literature review. The objective is to give an idea of the sectors which have been studied in the field of DM, as well as to demonstrate a degree of similarity and dissimilarity between the sectors which may be of contrasting natures such as manufacturing and retail service companies (D’Netto et al 2013).



*Figure 10 Sectorial/Industrial contextualization of DM. Selected studies only.*

One of the relevant questions is whether the sector of a company in which DM transfer has occurred is relatively new and whether it is a national strategic industry which can be defined as: “an industry that a government considers to be very important for the country's economy or safety” (Google definition, 2019). For instance, the study of Özbilgin (2005) on the implementation of global DM in the Japanese automobile sector suggests the important implications of the sectorial lens which therefore has a composition of the workforce supply as well as the importance of the so-called industrial relations between the actors who participate in the social debate around diversity.

1. Is there evidence of differences in DM between the production companies versus other, more creative companies?

Janssens and Zanoni (2005) in the article entitled “Many diversities for many services. Theorizing diversity management in service companies” conducted in the Flemish organizations, view diversity as “the organizational product” which depends on the specific circumstances related to the firm’s activity, such as the organization of work and the utilitarian discourse of DM adapted to the delivery of a particular service (Maxwell et al. 2000). The author draws on different types of service companies such as a hospital, a call-centre, an engineering company which offers industrial and mechanical services (automatization, product development, and CAD consultancy) as well as an outsource logistical operations company. For instance, one of the links between the service delivery and DM rationale is shown in an example from the healthcare industry, where a hospital was looking for diverse competencies in order to improve the quality of the service. In this study, diversity reveals that the practice of sourcing diverse candidates also reflects the principle according to which the internal workforce should reflect the diverse communities and customers.

A similar argument appears in another study, which suggests that the general “business literature” in DM and the business case of diversity, focused simply on the individual and the organizational benefits of diversity on performance, cannot be easily applicable to the hospitality and tourism sectors. This is due to the particular character of the work’s organization and the nature of the employee activity, which in this case, requires both more individual independence and team-oriented spirit than potentially in other sectors (Kalargyrou & Costen, 2017). For instance, one of the most common jobs in the hospitality industry is the concierge, which is a perfect example illustrating a job that requires little interactions with co-workers of an outsourcing company and team-oriented spirit.

The contrast between production and service companies

The research underlines a disparity in DM in the manufacturing and construction companies (Greeff, 2015) and services due to contrasting firm’s activities and associated services. Some scholars address the questions of gender diversity in the gas and oil industry and argue that the failure of the mainstream approach of DM comes from covering gender equality in a male-dominated industry (Williams et al. 2014).

Ali et al. (2011) suggested that DM can be more successful in several service companies rather than manufacturing firms, as according to the Resource Theory, diverse employees are more likely to have a cultural knowledge concerning the particular markets. In other words, service companies are involved in customer interactions and are driven more by a need for remaining competitive on the market much more than the manufacturing companies which are focused more on productivity. Furthermore, besides the limited market communications, the nature of the manufacturing business relies on the principle of independence between the operation sections (for instance in the automobile factory, the employees from the car's door assembling section do not work closely with employees from other sections). Furthermore, it is suggested that the production workers belong to different social identities (Ali et al. 2011). According to the study, the organizational reality can be even more pessimistic, as the innovation companies may be more likely to label the operation employees as "uneducated" people, and consequently limit the personal development and career advancements budget.

Loosemore et al. (2011) examined the perceptions of operation workers and managers on cultural diversity in the Australian construction sector. They found that there is a higher risk of negative perceptions in the construction industry than in other sectors, because of a shared belief that the linguistic diversity could impede risk safety at the construction site. Furthermore, the organizational culture of the Australian construction site is considered to be "self-regulating", as little external intervention is required to influence the daily life of the operation workers.

Finally, the study shows that three conditions should be met in order to drive a successful integration of diversity organizational policies in the construction company which would therefore enhance the employment of foreign workers: safety, efficiency, productivity, and harmonious integration.

The study by Janssens & Zannoni (2014) mentioned in the previous section shows a significant divergence between a call-centre type company and a construction entity which is focused to a great extent on efficiency improvement. The recruitment practices in a construction company are ethnically neutral and shed light on the importance of skills. Also, the study advocates for a consideration of a sector lens as well as the employer-employee relationship as its understanding goes beyond the largely recognized power issues of ethnic minorities and bring into light the added value of competency diversity issued from ethnic minorities and



associated “different identities” (Janssens & Zannoni, 2014). In view of this, instead of focusing on the historical reparation towards historically discriminated ethnic minorities (for instance reflected in the Affirmative Actions), a construction or a logistic company, could instead use the alternative approaches which openly value the employee’s activities based on what they do for the company and how they make use of their competencies. The authors point out one of the employment practices of “one-language policy” or “two-language policy” which indicate a degree of organizational acceptance of language diversity used by ethnically diverse employees. The study of firm A, the production company in the present thesis, shows that after the abandon of the diversity policy by the owners, the company changed its vision from a two or three language approach (Polish and English and sometimes French in view of the headquarters) to a single-language policy (Polish) forbidding the use of any other language than Polish.

## 2. Does the organizational resistance to diversity take place in specific sectors?

The example of the automobile sector in Japan (Özbilgin, 2005) is a relatively old industry which is important in terms of the employment of the national workforce (native people) rather than an ethnically diverse workforce (“foreign workers”), which may determine how diversity management in the recruitment practices are limited to the national or regional workforce. The case study shows that the dominant business language in the headquarters is Japanese, making it a real barrier to employ foreign national candidates. Japan is among the world’s three largest automobile producers employing around 5,5 million people, or 8,7 % of the Japanese national workforce (Wikipedia, 2019). Also, the automobile industry in Japan is important not only from the national or economic standpoint, but is characterized by an important network of stakeholders including big companies, trade unions, and employees which are accountable for the adoption of DM in Japan (Özbilgin, 2005). Finally, the study confirms the hypothesis that the sectorial analysis does not have to provide generalizable findings and should therefore consider the regional contextualization of diversity management, arguing that the Japanese automobile industry is not the same as the US or UK automobile industry, because it is disseminated in several regional offices of the national branch.

Velinov (2018) examined the DM discourse in pharmaceutical companies and called for the consideration of the industrial challenges while studying DM. The author drew on how the classical argument of mainstream research (for instance in call centers) according to which the diversity strategies are bound to reflect diversity of the firm's customers (Cox & Blake, 1991), can be reflected in the pharmaceutical industry. Velinov (2018) raised an important question of *"Why should pharma business be concerned with diversity?"* However, the author referred to the global mission of the pharmaceutical company, arguing that the employees of the pharmaceutical sector should be particularly driven by the performance motives and therefore use *"diversity management as a key to improving the health and wellbeing of the world through the passion of its employees"* (Velinov, 2018). In the same time, it is argued that the aforementioned argumentation does not apply to all the pharmaceutical companies around the globe.

The study of food chain companies (Woods & Sciarini, 1995) shows that different "proactive" approaches to valuing diversity in the workplace can be observable and one of the reasons behind it is the nature of daily fast operations and pressure over employee efficiency and productivity in a fast-paced environment such as fast food restaurants. If the companies believe in the mainstream theory according to which diversity enhances individual productivity and performance, it could be used as an argument to drive the overall performance as well. The study shows that the productivity in the fast-food industry is not the same as the productivity requirement in the production companies, as it requires more people's interactions and therefore diversity could bring positive outcomes (Czerniachowicz, 2016). Besides, the grey literature suggests that the interest of the fast-food chain corporations in ethnic diversity can have less ambitious implications, as some of the big US corporations seem to target the Black and Hispanic young people in the adds who may be more interested in less healthy but cheaper food options (CNN, 2015).

### 3. Is there a clear divergence between the public and private sector?

Cooke and Saini (2015) examined the practices of the DM policy adoption by Indian managers. The study revealed a disparity in the implementation of DM regarding the factors such as nationality, ownership, form, and age of the organization and the industry. The DM initiatives

including DM policies may be limited in the strategic industries (public) having the monopoly on the market and national protection, while the “operating in knowledge-intensive and highly competitive industries” (Cooke & Saini, 2015) may be more likely to adopt HRM practices including diversity because of the need to remain competitive on the market. Also, a study based on the company's website of DM in the Portuguese context showed the differences in adopting the corporate DM according to ownership (“Portuguese” vs. foreign companies), arguing that the moral rationale related to the legal framework is more perceptible in the first category of firms (public), while the strategic argumentation of DM prevails more in the private-owned companies (Barbosa & Cardoso, 2010).

Verheij et al. (2016) examined the difference in addressing DM in public, semi-public and private sectors in terms of how employees perceive discriminative behaviours and unequal treatment in the workplace. As compared to semi and private sectors, the public sector companies are likely to develop different DM approaches because of the political pressure which forces them to align with the publicly accepted values and norms and even reflect the governmental policies which are rather focused on legitimacy and social justice (Pringle & Ryan, 2015). The main difference across the sectors appears to be driven by “a degree of publicness” (Verheij et al. 2016), meaning a dependence of the government influence. The extent of public extension may affect the employee's perception of discriminative behaviours (in public sectors, employees are likely to experience negative treatment) as well as the organizational approach to DM (the pro-equality approach in the public vs. performance diversity and performance-driven argumentation in the semi and private).

4. Is there a distinction between the HR and non-HR employees' perception, in particular between the white-collar workers, the blue-collar workers and operative employees?

Some studies look at DM differences in the case of HR and non-HR employees as well as the managers and the operational workers (Davis et al. 2016) These studies are quite relevant, as the case study of the production company (firm A) shows that production workers are considered to be less concerned by diversity initiatives and therefore they are omitted in the diversity events or communication campaigns that are addressed mostly to the administrative workers.

Soni (2000) conducted a study of the interlink between the employee racial and gender identity and its impact on the acceptance of the DM activities, the so-called “receptivity” to diversity in the case of a regional bureau of the US Environmental Protection Agency. This research has a few interesting insights about understanding the employee’s attitudes towards DM, with a strong focus on the public sector. First, it is shown that the empirical findings do not reflect the American literature advocating the employee’s enthusiasm towards diversity regardless of the particular circumstances of each organizational setting. Even though the study was conducted almost two decades ago, it is suggested that DM in the public sector appears to be particularly troubling, as it has its roots in the traditional, administrative bureaucratic organizational culture which gives priority to the model of “valuing homogeneity”, conformity with the business principles, “management controls and a disciplined adherence to prevailing standards and norms” (Soni, 2000).

Greeff (2015) in the study entitled “Organizational diversity: making the case for contextual interpretivism” advocates for the intersectional approach using both the lens of the country and the sector, arguing that mining and construction industries in South African functions apply a particular approach to equal opportunities which should be viewed in the “interpretivist perspective” including :

*“an understanding of employees’ circumstances in the organizational context should guide its diversity endeavours”, which puts the organization in a better position to manage this diversity than if it were considered only from a functionalistic perspective”.*

Greeff (2015)

For instance, the study underlines one of the “diversity indicators”, the employee’s occupation which appears to play a significant role in terms of employee communication, arguing a dissimilarity in the process and a communication channel between the managers (HR) working in the administrative building and the blue-collar coal workers.

Also, it appears that the variety of attitudes towards cultural diversity depends on the employee’s activity providing insight into the ways in which HR and non-HR employees experience (sometimes their occupation is precise) and interpret the DM. For instance, the survey sent to different Australian organizations showed that HR managers who are therefore likely to be the champions of diversity policies have more positive attitudes towards a greater

diverse workplace than the non-HR employees at the managerial level who are not only less familiar with the subject but also may be less aware of the diversity initiatives in the workplace (Davis et al. 2016).

Another study showing the disparity regarding the nature of the business is by Hassi et al. (2015) as the industry is one of the factors determining the employee perception of diversity. The study suggests that the agriculture industry in Morocco is characterized by a less open attitude towards diversity, compared to the retail industry in the same country, because of lesser international exposure and the local embeddedness of the agricultural activity which is mostly limited to rural areas as well as the level of international education. Also, it is suggested that industries such as consulting, sales, tourism, hospitality expose the employees to diversity much more than small, locally rooted businesses.

#### 1.5. How does the concept of organizational diversity resistance apply in different national contexts?

This section highlights two examples of theoretical framework of resistance to diversity (Jonsen & Özbilgin, 2014; Thomas & Plaut, 2008) These insights are particularly relevant because different forms of resistance to diversity may explain why the organizations that fail DM initiatives. This part of the chapter will be followed by the examples of deeply rooted resistance to diversity which occurred in the organizations within different countries, considering the level of homogeneity of the national population. The conceptual framework of organizational resistance provides several open questions about its availability, for instance in the analysis of the Polish context. In the empirical data supporting this theoretical model, using the inductive method in the research is necessary, because in some cases we may find that the local employees do not recognize the “resistance” to diversity at any level of organization, and that the resistance is illustrated in a different way than it is theorized.

During the EDI conference (Equality, Diversity and Inclusion) in 2017, the organizational resistance to diversity was discussed from a multidisciplinary research perspective. Researchers adopted multiple definitions of resistance in diversity research at different levels of application. The main theme of the conference underlines the multilevel approach applied to resistance in diversity research, arguing that resistance can occur at the national level (for

instance political and societal debate), organizational and individual. Most importantly, one of the key learnings from the conference is that the resistance to diversity may occur in different ways in the given national perspectives and should be contextualized.

### The theoretical framework of organizational resistance to diversity

Resistance to diversity or diversity management has been studied in the literature on different levels of analysis and can be viewed from different angles: a resistance expressed in the employees negative attitudes and prejudice towards different forms of organizational diversity or a resistance to the Anglo-Saxon approach to DM (namely to the approach of the HQ) as it is showed in critical management studies. What is resistance to diversity?

*Vassilopoulou (2011) argued in her thesis that: "Organisations are part of social life and hence, it is no surprise to find similar resistance regarding race-related issues in an organizational setting. This resistance then translates into organizational practice and impacts organizational diversity management approaches in such a way that race-related issues are not part of the diversity management agenda".*

(Vassilopoulou 2011, p.257)

Unsurprisingly, organizational resistance to diversity policies and practices may cover different facets and appear at the organizational and individual level. The important question is who is resisting and to what type of practices. For instance, resistance to diversity, a so-called backlash to the implementation of the "top-down" organizational diversity initiatives can be seen as the employee reluctance to change the status quo (Daas & Parker, 1999; Mahadevan, 2012; Davidson & Proudford, 2008). Other scholars argue that resistance to diversity can be observable in the beliefs of the "dominant" and "subordinate" groups of employees about, for instance, promotion opportunities (Cassell & Dick, 2002). Considering the power and privilege issues, French and Bell (1999) argue that employee resistance to change is embedded in the fear of losing power and influence.

More recent literature specifically focused on diversity resistance provides the following definition: "a range of practices and behaviours within and by any organizations that interfere, intentionally or unintentionally, with the use of diversity as an opportunity for learning and

effectiveness” (Thomas & Plaut, 2008). Accordingly, diversity resistance can be manifested in explicit and open practices and behaviours as well as in more implicit, subtle ways. Thomas and Plaut (2008) proposed a taxonomy of diversity resistance in organizations (See Figure 7).

The theoretical concept of organizational resistance to diversity provides insightful information about how organizations and their employees may “deal” with the organizational diversity initiatives and the levels where the confrontation may occur in an implicit way. One can argue that theoretical guidance in the diversity of studies is necessary, while others may assume that this concept may illustrate the universal conceptualization of resistance which does not consider the regional or national variations of the forms of resistance which may be perceptible in other national contexts. The following model illustrates only two levels: individual and organizational.

| Understanding diversity resistance            |               | Levels at which diversity resistance is manifested in the workplace                                                                                  |                                                                                                                                                                                                                     |
|-----------------------------------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Manifestations of Diversity Resistance</b> | <b>Overt</b>  | <b>Individual</b><br>Verbal and physical harassment<br>Intentional and hostile forms of discrimination                                               | <b>Organizational</b><br>Intentional discriminatory HR, resources and policies<br>Retaliation                                                                                                                       |
|                                               | <b>Subtle</b> | Silence regarding inequities<br>Avoidance of exclusion based upon difference,<br>Discrediting of ideas/ Individuals, who are different From the norm | Cultures of silence around diversity and discrimination, Mixed message related to diversity, Diversity as “non-issue”, Message that place diversity are too time-consuming/ too complex,<br>Secondary victimization |

Figure 11 The taxonomy of diversity resistance Source: Adapted from Thomas & Plaut (2008)

The insights from the study call attention to the subtle organizational diversity resistance, which might be particularly relevant when attempting to understand the communication issues in the transfer of DM in Poland. One of the forms of resistance is marked by cultures of silence around the issues of diversity and discrimination at the workplace which means

that the discrimination is allegedly acknowledged but nothing is done to overcome it and no one talks about it.

Also, the term of discrimination may be absent in the organizational vocabulary. This relates to the problems of power relations between the dominant ethnicity and ethnic minorities. Another example, the mixed messages of diversity can intentionally address other irrelevant topics, in order to deflect attention from the actual problems, for instance, drive away the attention from the open discriminations to wellbeing at the workplace that is not even a topic of complaint among employees.

Another interesting point is the individual level of subtle resistance, which suggests that local employees may be reluctant to what is different from the “norm”. This statement is frequently applied in multicultural organizations, where a mix of human differences represents challenges to accept the “Other”. However, it is highly important to illustrate the case scenario of homogeneous societies and organizations, where individuals who are “different from the norm” may constitute a significant minority, as compared to the dominant nationality among the staff. Yet this perspective seems to attract less interest among scholars who tend to emerge their studies in highly diverse environments, as there are probably other challenges to encounter, from power relations, cooperation and integration issues.

#### Flawless commitment to diversity versus failed practice

Scholars indicate a gap between rhetoric and practice and show a startling resistance to mainstream DM, which can be viewed not only as a result of the socio-historical, political and demographic context, but also through local contingent factors (Ravazzani, 2016) such as the lack of resources to develop DM agenda, the lack of understanding and appreciation for diversity in the employee perspective (mistrust, reluctance). These studies show the combination of contextualization and pragmatism that prevails in some organizations and determines the refusal to accept the forced understanding of diversity, for example in the construction sector.



The figure below, “Reality Versus Rhetoric: Diversity” can also provide information about whether the company which actually communicates externally on diversity is doing something in reality or if there is a kind of resistance. The figure (Figure 12) presents the four configurations of a divergence between rhetoric and reality.

|     |                    | Yes                  | No                    |
|-----|--------------------|----------------------|-----------------------|
|     |                    | <i>Rhetoric</i>      | <i>Espoused</i>       |
| Yes | <i>Reality TMT</i> | <i>Walk the talk</i> | <i>Empty rhetoric</i> |
| No  | <i>Commitment</i>  | <i>Just do it</i>    | <i>Low priority</i>   |

Figure 12 Rhetoric vs. Practice. Adopted from Özbilgin, & Jonsen (2014)

In the light of the present thesis, we draw on the model of DM to address the question of whether the failure occurs at the rhetoric or at the practice level? The quadrant “Walk the talk” means that the company is a champion in the communication on its engagement towards diversity. “Empty rhetoric” means that companies communicate a lot on diversity but do little to achieve a certain degree of maturity in DM. The “Just do it” approach means that the companies have an important diversity policy and have some activities which may be labelled as “others” not necessarily as DM initiatives. Finally, the “Low Priority” model suggests that the organization does not have diversity rhetoric, strategy or dedicated resources. In other words, diversity is not a priority. According to the study, the consistency between rhetoric and practice is a premise for the successful and meaningful implementation of DM in the workplace.

What if the company fails at both levels, the rhetoric and practice, as it lacks a diversity policy, or adopts the irrelevant initiatives from the DM point? We decide to mention this model, because the data from Poland shows that the company may indeed have the diversity practices. But which are not labelled “diversity practices” and without a knowledge of the social

context and the familiarity with the language of native employees, it would be difficult to decipher the existence of diversity and inscribe it in the cube “Just do it”.

The next section gives some realistic organizational examples of explicit and implicit “hidden” forms of resistance to DM, which was initially developed in the heterogeneous contexts and only afterwards transposed to the homogeneous countries. Organizational resistance towards the dominant Anglo-Saxon model of DM is viewed here as one of the factors for failure of DM in the workplace and should also be seen from different national perspectives. While the mainstream DM studies analyze DM seen as an important pillar of the route to successful integration, the critical studies provide strong empirical evidence of the failure of the concept of diversity, showing “what is wrong” with the universal assumption of what DM stands for. For instance, the CMS (Critical Management Studies) apply the interpretative lens in DM research (Boxenbaum, 2006) to understand the failure or the translation process of DM practices in more or less resistant local contexts (Boxenbaum, 2006). This perspective is of a central interest for this thesis.

## 1.6. Conclusions

Despite the dominant positivist attempts to narrow the scope of DM studies to its subject matter (the business case of diversity, equal opportunity paradigm, non-discrimination) this chapter advocates for a less orthodox way of studying DM (Knights & Omanovic, 2014). The mainstream approach is criticized for the growing tendency to ignore the non-standard studies (“alternative studies”) and the local contexts that are different from the ones in which the original DM message took place. One of the threats of the orthodox literature is the ignorance of social cohesion (Chanlat, 2017) in the workplace at the expense of the performance and innovation-related issues.

The “Global diversity management” refers to : *“planning, coordination and implementation, a set of management strategies, policies, initiatives, training and development activities, that seek to accommodate diverse sets of social and individual backgrounds, interests, beliefs, values, and the way they work in organizations with international, multinational, global and*

*transnational workforces and operations*” (Özbilgin & Syed, 2015), while taking into account the cultural variations. This theoretical framework of DM confirms the need to recognize the internal organizational practices of managing a diverse workforce, in the same time, advocates for a freedom to interpret diversity in different ways. It seems that the International Diversity Management in Poland (IDM) ignores the initiatives such as trainings, coordinated initiatives to accommodate foreign workers and enlightens the last part of the definition by Özbilgin (2008) referring to how diverse individuals work within international workforce across the subsidiaries in a multinational firm.

This chapter highlighted that *“the multiple meanings that diversity management is given across organizations, sectors and countries bring forth certain paradoxes”* (Özbilgin, 2008). From the pragmatic side, one of the paradoxes is the striking lack of evidence and legal records of inequalities and discrimination issues in the transition economies, in which a perception of ethnic minorities may be a source of social conflicts and may be a need to reflect a collective learning experience in the area of DM. A theoretical paradox is indeed a lesser interest of scholars in culturally homogeneous societies, due to a false assumption that inequalities, racism and other discrimination related problems are a non-issue, because simply they do not occur in these contexts.

Of particular interest to the debate around the contextualization of DM is the sectoral unfit. Because certain companies, for example manufacturing and production have specific organizational cultures and organizational identities (Davoine & Barmeyer, 2011) which may determine the transferability of management tools. The research shows that interpretative studies on DM should not only take into account the company’s industry, but also other arbitrary factors, such as ownership (public vs. private; national vs. international) in particular when it comes to Eastern European organizations.

## 2. CHAPTER TWO - International transfer in management

## 2.1. Introduction

*“How transferred organizational assets, including the notion of foreignness, take on new meanings in distinct cultural contexts”.*

(Brannen, 2004)

Cross-country transfers of management initiatives especially amongst MNCs can be seen as the consequence of the growing impact of globalization as well as the acquisitions, mergers, and joint ventures. Nowadays, the questions of transfer are particularly visible in the global companies that attempt to transpose different forms of corporate documents, assuming that these management instruments can transcend the national borders between the countries. The definition of “transfer” is not limited to simply sharing knowledge and practices, but it englobes a process of integration within the units in a multi-level perspective (organizations, projects teams and individual).

For example, transfer within the foreign subsidiaries has indeed raised a great interest in a debate around “the convergence vs. divergence or the so-called “standardization vs. localization” strategies in management (Pudelko & Harzing, 2007). It seems that the literature in management is divided between the universal approach to management assuming that practices converge in the multinationals in a result of a globalization process and the cross-country-effects of transfer. The intercultural transfer within organizations is dominated by two approaches: the culturalist approach drawing on a study of Hofstede (1980) and its adaptations and is based on a massive quantitative and qualitative data and the second approach: diversity of individual perceptions within the cultural areas which can be often understood through observations and conversations (Segal, 2011). It is argued that the culturalist approach to transfer in management seems to be ahistorical (Ferner et al. 2005) and for this reason does not apply to the in-depth study of transfer within a historically constructed concept regarding diversity management. Also, the culturalist approach in diversity study does not provide the insights into the richness of stakeholder’s views which are the key conditions to decipher the complex meaning of diversity practices in Poland.

Ferner et al. (2005) argue that:

*“It seems likely that other issues will provoke yet greater ‘resistive hybridisation’ than in the case of diversity. This is particularly true where transferred policies directly confront core interests of important interest groups in the subsidiary, including employees and unions as well as managers”.*

The alternative approach is the study of intercultural transfer determined by the main factor: the national culture (D’Iribarne, 2015) of the country of destination. When an original practice “travels” from a host country to a recipient country (Czarniawska & Sevón, 2005), it may undergo the multi-level process of contextualization (the national and organizational levels of analysis). Contextualization leads to the emergence of new practices and tools which pose challenges for cultural adjustments on behalf of the local actors in the given organizational settings. For this reason, a transfer should be studied on a case-by-case scenario. For example, according to Geppert & Mayer (2006), a process of transfer within multinationals includes:

*“the perception, interpretation, adaptation and finally the adoption of organizational practices by the members of an international, culturally diverse recipient unit largely remains a black box”.*

(Geppert & Mayer, 2006)

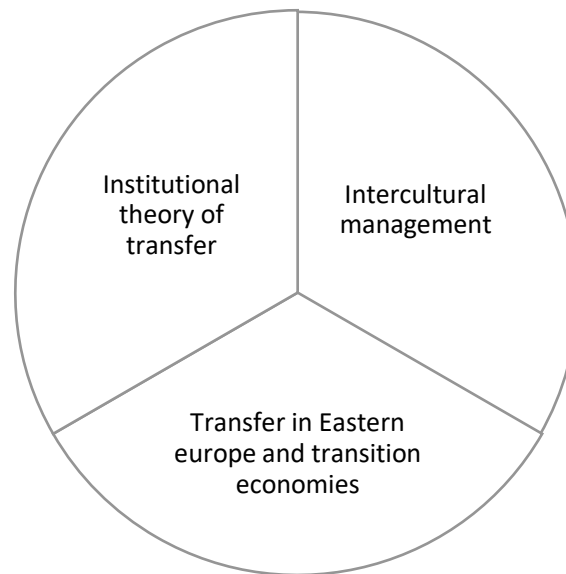
We have identified three main scenarios of transfers from a host country to a recipient country: a smooth unproblematic transfer (Sayim, 2011); the hybridization of management practices (Fortwengel, 2015; Yousfi, 2013) and the organizational resistance (Vassilopoulou, 2015; 2017). While the previous studies focused on the success or failure in the transfer of strategic organizational practices (Kostova & Roth, 2002, Fortwengel, 2016), considered inconsistent findings in the case studies, the term of “failure” should be formulated cautiously.

The next section will be composed of four parts: first, we will draw a few relevant definitions of the concept of transfer to identify which definition seems to be the most relevant for the thesis as well as the process of transfer; second, we will briefly present the key elements of the Kostova’s institutional theory (1999; 2002) and make parallels with the transfer of DM practices; third, the chapter continues in reviewing the intercultural perspective of a transfer, as these studies have important implications for a debate around the particularism approach, arguing that the management tools and practices are “rooted in the cultural contexts” (Chevrier, 2015). In this regard, this section will draw on a few studies which highlight the role

that national cultures play in the transfer as well as the local reception of the management concepts. We decide focus on transfer, rather than examining a largely recognized literature on the concept of national culture which is of a secondary importance for the findings.

Finally, we will narrow the perspective to the cross-national transfer in the European context from the “Westerners” (Michailova & Hollinshead, 2008) to “Non-Western” counterparts (Nicolopoulou, 2011) or, from the “developed” states to the ex-communist bloc countries. Some scholars argue that the relationships between West and East, in particular Poland, should be seen in the categories of the post-colonialist studies, because Poland has a “postcolonialist syndrome” of a country that has been somehow “colonized” by western countries (for example during the WW2) and eastern countries, in particular Russia under Soviet regime.

The Polish case study provides insightful findings into the missed implementation of policies and practices which are more exposed to local resistance, e.g. diversity policies (Ferner et al. 2005). The idea is to highlight how a debate around the transfer of various forms of knowledge, skills, practices, tools, is shaped in the CEE region. In the past, Eastern European countries faced radical changes of ownership, from privatization, preparation to meet the European standards and increasing internationalization (Obloj & Weinstein, 2002), and visibly have followed different paths of social and economic development from their western counterparts. We made a choice to focus on the most relevant studies based on qualitative methodology since these studies allow to gain a deeper insight into the challenges of transfer and the unique and implicit forms of resistance to the western methods of management.



*Figure 13 Three layers of the literature on international management transfer*

## 2.2. Definitions and phases of transfer

This section shows that it is not enough to search for the references using the key words “transfer of management practices”, as there is a variety of studies which refer to tangible resources such as tools and projects and intangible assets like values, knowledge or skills. Also, it seems that scholars do not provide the unanimous definition of transfer and provide terms such as dissemination (Szulanski, 1996), sharing (Raza & Tariq, 2016) or diffusion (Czarniawska & Sevón, 2005). D’iribarne (2012) pointed out that the abstract words such as “sharing” or “transfer” are often applied without precising the circumstances of its emergence and development. The next section provides few definitions of transfer in management.

The following figure highlights different stages of a transfer regardless of the object of the transfer as well as different denomination of transfer stages.



|                                                                                           |                                                      |
|-------------------------------------------------------------------------------------------|------------------------------------------------------|
| Adoption, Appropriation, Internal contextualisation                                       | Saleh (2015), Roquet (2009), Chevrier & Segal (2011) |
| Initiation, Implementation, Rump-up, Integration                                          | Szulanski (1996)                                     |
| Accepting, Understanding, Communicating, Utilizing                                        | (Ruth et al. 2005)                                   |
| Configuration, Decision of transfer, Negotiation process, Implementation, Internalization | Susaeta & Pin (2008)                                 |

*Figure 14 Different stages of a transfer process. Selected references only.*

For example, Saleh (2015) adopted a definition of transfer which is not viewed as “physical transposing of a tool” but rather as “social reinterpretation made by local actors” (Saleh, 2015), which refers to the historical analysis of how a corporate version of the code of ethics has been translated in the Egyptian subsidiary of Lafarge Group. Therefore, the scope of transfer demonstrates precisely “what has happened after a tool has been transferred to a subsidiary” as it focuses on the fundamental questions like what is transferred; why is it transferred, how it is transferred and what happened after the transfer? (Chiang et al. 2017).

On the other hand, Szulanski (1996) argues that a transfer seen as a process consists of four key steps and starts with a decision of transfer followed by: “initiation”, “implementation”, “ramp-up” and “integration”. For instance, the step of “initiation” includes all the steps that lead to a decision of transfer and reflects the organizational reality before the physical transfer occurs. According to a definition, the term “transfer” emphasizes the unique experience and circumstances under which the knowledge or practice was imported to a recipient country, while the term “dissemination” or “diffusion” refers to a continuous process of transferring the assets to another firm. Kostova (1991) suggests that the process of transfer is not linear, therefore the successful “integration” phase may be interrupted by local actors even after the previous stage “ramp-up” is assumed to be effectively completed, thereby providing the continuous success story with a tough end. The role that managers play during the transfer play an important role in a continuity of dissemination of tools.

Geppert & Mayer (2005) argues that:

*“The word 'transfer' is used rather than 'diffusion' to emphasize that the movement of knowledge within the organization is a distinct experience, not a gradual process of dissemination, and depends on the characteristics of everyone involved. Transfers of best*

*practice are thus seen as dyadic exchanges of organizational knowledge between a source and a recipient unit in which the identity of the recipient matters”.*

The discontinuity of DM policy in firm A is a good illustration of the fact that a process of transfer is not a gradual phenomenon and can be interrupted along the way.

A third relevant definition draws on the taxonomy of a process transfer in the context of knowledge transfer by Murray & Hanlon (2010). The author draws attention to a tacit and explicit nature of a transferred unit of analysis. At the organizational level, the explicit perspective of transfer refers to cognitive and physical perspectives reflected in various documents, such as organizational charts, company’s principles, etc. While a tacit nature reflects the individual as well as the collective interpretation of practice and refers often to corporate culture. This definition highlights the implicit nature of transfer which may be articulated not only in the written principles but also in verbal, writing or drawings (Murray & Hanlon, 2010). D’Iribarne (2012) explains that tacit and prescribed nature of transfer are interlinked, because implicit values espoused by subsidiaries can be identified through the analysis of the operationalization of these practices (“explicit”) in the workplace. Therefore, complexity of transfer is determined by the intraorganizational relationships between different groups of stakeholders including employees.

Another definition of transfer provided by Ruth et al. (2005) displays a cross-cultural transfer of knowledge in Russia, arguing that a process of transfer starts with the stage called “accepting”. This means that local managers are willing and capable to accept a new method of management, but it does not mean that they have already accepted a practice or a piece of knowledge. For this reason, the acceptance stage should not be seen as a success factor of transfer.

In a similar spirit, Segal and Chevrier (2011) showed that the transfer goes beyond the formal and objective dissemination of tools, arguing that *“the limits of diffusion of common norms lead to a hybridization process or divergence between the original and transferred practices”*. The hybridization of practice in a cross-national transfer can lead to the emergence of completely different practices at the subsidiary level. Why do companies develop “hybrid” practices or programs? Nakhle (2011, p.285) explained that the adaptation of training programs occurs when there is a real need at the local level, and is determined by the

contingency factors, such as country effects, market effects or employment effects. A similar phenomenon was observed with regard to the so-called “hybrid culture” (Segal, 2017; Nakhle, 2011) for example through a negotiation between a parent company and the subsidiary of a degree of acceptance and integration of a specific form of practice and values underpinning organizational cultures (Segal, 2017).

Despite a variety of approaches of the term of “transfer”, the most relevant definition for this thesis is provided by D’Iribarne (2012), as it highlights the “*transfer between cultural worlds*” which is the essence of the research problem. D’Iribarne (2012) argues that: *There is a natural tendency to try to disseminate concurrently the values one upholds and the specific way in which these values take shape in one’s own culture*”.

The cross-country transfer involves a process of “*moving something or someone from one place to another*” (Cambridge dictionary, 2019) through the means provided by the organizational structure, but most importantly it plays an important role building “*bridges between what unites us and what separates*” (D’Iribarne, 2012, p.91).

### 2.3. Scope of transfer

In this thesis, the main focus is on the “post-transfer” organizational reality, examining “what happened after the policies and practices have been transferred to the Polish subsidiaries. The following figure (Figure 15) presents the theoretical approach of HR practices’ transfer process from the home country (the headquarters) in direction of the host country (subsidiary level) by Susaeta & Pin (2008). The “five stages model” allows to underline the scope of this thesis, as the main focus is on the adaptation of practices and policies at the subsidiary level.

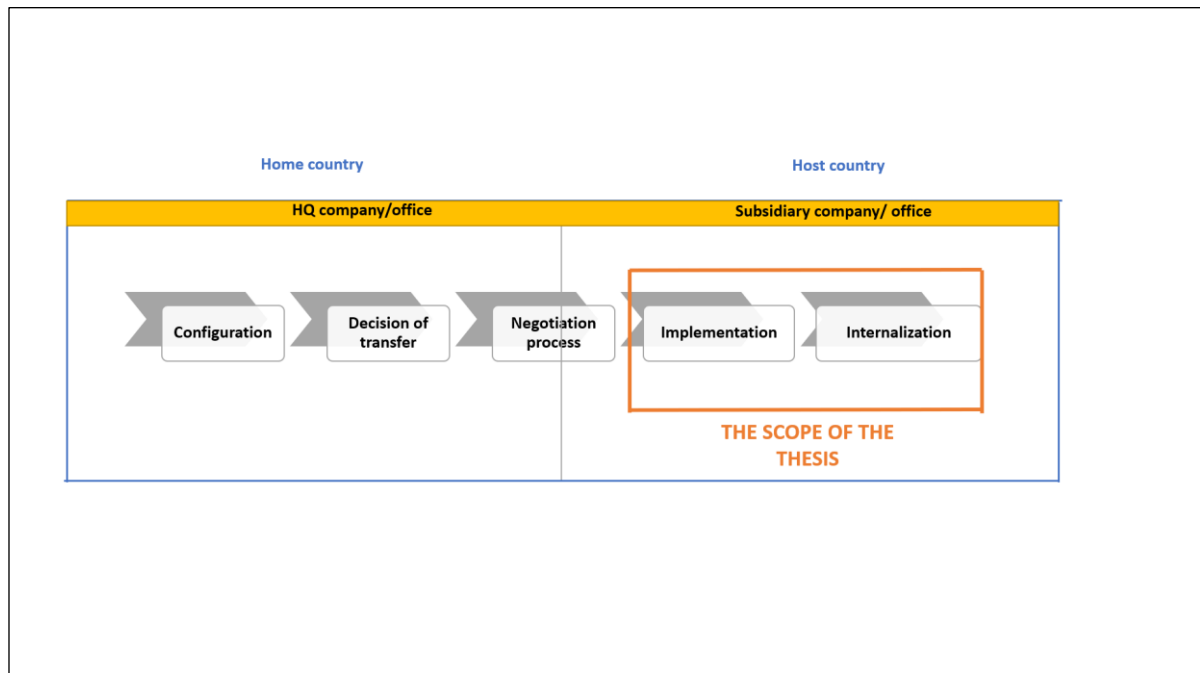


Figure 15 Scope of transfer. Source: Susaeta & Pin (2008)

The authors suggest that the adaptation of practices by the subsidiaries is determined by the national values of the host country and the institutional environment. The two last phases of transfer: implementation and internalization have been explained by the institutionalist theory (Kostova, 1991) and will be discussed further. This PhD adopts a definition of transfer viewed as a process which is extended to the times after the transfer was completed by the headquarters and after the sale of the subsidiary to another company. This particular stage of transfer may provide important lessons about the sustainability of practice transfer.

Finally, while scholars argue that a cross-national transfer within multinational companies can be limited due to “cultural distance”, the partisans of the institutional theory broaden the definition to the “institutional distance” (Kostova, 1999) between the host and a recipient country. This brings us to the next section.

## 2.4. The institutionalist theory of transfer

This section draws attention to the institutional theory of transfer by Kostova (1999; 2002) which has been largely recognized in management literature (Berthon, 2001; Pudenko, 2006; Segal, 2016). The section starts from the key observation that the failure of a transfer of new

tools is likely to be determined by the conflicting pressures of the organizational and environmental contexts. Kostova (1991) widens the scope of the transfer to highlight the role of the values and beliefs of employees from a recipient unit. The following section will emphasize few chosen adaptations of the institutional framework in different organizational and cultural settings (Berthon, 2001; Ferner et al. 2005; Segal, 2015).

The model of transfer by Kostova & Ruth (1999) suggests that the adoption process is composed of the implementation and the value internalization, thus is determined by the key characteristics of the organizational, relational and institutional contexts.

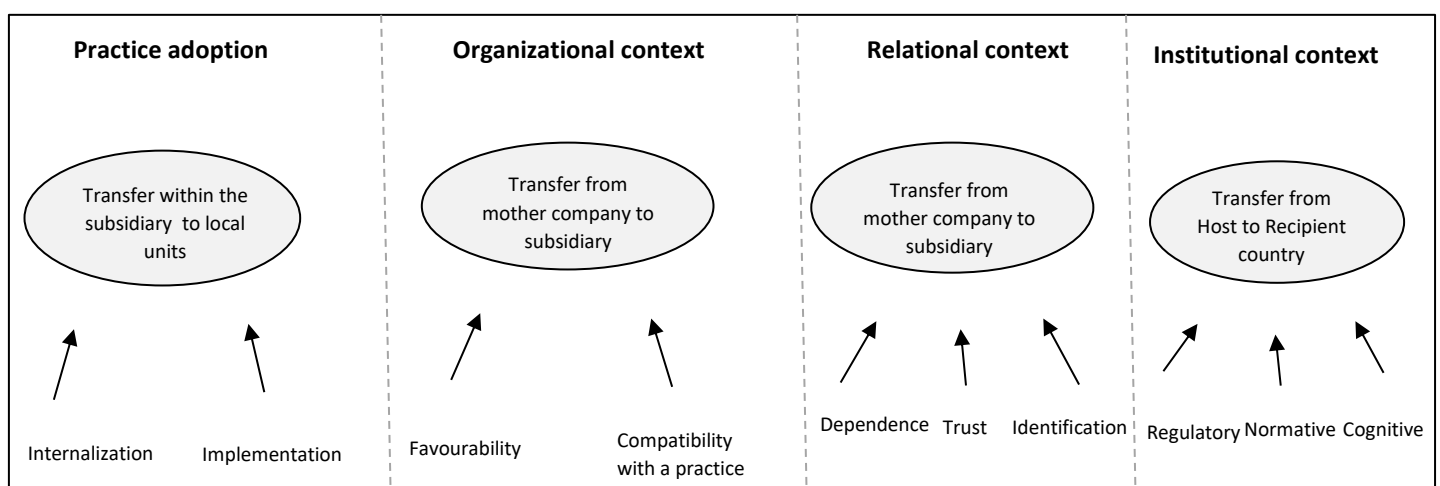


Figure 16 Model of transfer and practice adoption. Adopted from Kostova (1999; 2002)

#### Institutional context: The regulatory, cognitive, and normative components

If a transfer occurs among the countries with a gap between the regulatory systems in terms of DM like for example Poland and France, these countries are divided by the so-called “institutional distance” (Kostova & Zaheer, 1999), as the corporate policies and practices seem to reflect the institutional environment in which they are embedded. The “institutional profile” of a recipient country encompasses the characteristics of regulatory, normative and cognitive institutions (Scott, 1995; Kostova & Zaheer, 1999).

The regulatory context is concerned with the national legislation which can promote certain attitudes and behaviours (Kostova & Roth, 2002). The employment, the non-discrimination and diversity policies may be strongly affected by an unfavorable institutional environment which therefore can lead to the restrictions in the development of organizational policies. According to the theory, if a practice is inconsistent with the socially accepted norms and schemas, it can negatively influence the way in which the local employees understand what leads to rejection. In a similar spirit, the emergence of legal framework with regard to the cultural integration of immigrant population might have indirect but important impact on development of DM policies in organizations.

The cognitive context refers to the social schemas and categories specific to a particular country. The cognitive structures can also reveal the stereotypes shared within society and therefore can potentially impede the practice transfer. The cognitive dimension reveals what people in a given cultural area perceive some practices as “normal” based on the level of knowledge, language codes and interpretations. For example, the Polish scholars in DM argue that one important condition for transfer of DM is a cognitive representation through raising awareness about diversity in Polish society.

The normative context reveals “values, beliefs, norms, and assumptions about human nature and human behaviour held by the individuals in a given country” (Kostova & Roth, 2002). For example, a practice of collecting numerical data in Poland with regard to personal dimensions such as ethnicity, nationality, sexual orientation etc. is considered to be illegal and unacceptable in the work environment. Kostova and Roth (2002) introduced the term “normative profile” of a recipient country which leads to a greater interiorization of value-based practices by local employees. The process of “internalization of values” by local employees is defined in a way *“that state in which the employees at the recipient unit view the practice as valuable for the unit and become committed to the practice”*. (Kostova & Roth, 2002).

Accordingly, the process of internalization of diversity-related values by employees depends more on the perceptions of the employees who are in charge of a local implementation as well as the “receivers” at the levels of local units.

The employee's beliefs actually represent a deep layer of the implementation process that is not visible on a surface level. A transfer can be considered from both angles, from the HQ to the subsidiary and from the local management of the subsidiary to the regional units. It is unlikely that the sustainability of imported practice will be preserved if a practice has met with a backlash from both the local management and operations departments. According to this point, if the employees do not internalize a practice in a positive way, a practice may be exposed to a greater risk of abandon in the future.

A supporting argument to Kostova's theory was provided by Fortwengel (2015) who argued that diversity policies are more likely exposed to rejection than other practices in the organizations. Why is that? Because diversity-related practices can be viewed as particularly "value-infused" (Czarniawska & Sevón, 2005) initiatives. The diversity of nationalities is a social fact and is not simply a question of managerial adaptation, but reflects the recent debates on immigrants, human rights and non-discrimination which are therefore marked by a plurality of views and refusals in different countries of the EU. Drawing on the institutional theory, a practice should be legitimate from the social norm's standpoint, which means that the values which underpin a practice should be accepted or collectively supported at minima in the given society. Czarniawska & Sevón (2005) argues that the countries of Eastern Europe may find the practices transposed by the multinational firms automatically lacking legitimacy, because the domestic firms may have lost their commitment to legitimacy due to the "economic, political or social cataclysm" (Kostova & Zaheer, 1999) translated in corruption affairs, political nepotism, etc. This case scenario reflects more the findings identified in the public sector in Eastern countries.

The problematic situations of transfer are not dictated by "institutional automatism" (Barmeyer & Davoine, 2011), but depend also on the headquarters- subsidiary relationship, in particular dependence, trust and identification.

#### Relational context: Dependence, Trust, Identification

The implicit landmark of trust translates into the subsidiary's beliefs that the mother organization is truly committed to respecting international standards and not taking advantage of its power over the subsidiary. In other words, members of a subsidiary assume that

everything the mother organization does is good for a subsidiary and is aligned with the international commitments. According to the authors, the relationships of trust can be critical if the members of the headquarters view that a practice has no value for a subsidiary due to the conflicting institutional profile of a recipient country or if the members of the subsidiary doubt seriously in the value of a practice that is ambiguous for the mother organization. In the area of DM, it would mean that the members of a subsidiary strongly believe that the headquarters have good intentions while transposing their global commitment to diversity at the local levels and that the headquarters are honest with a subsidiary, while trying to convince its members about the values of diversity strategy.

A transfer may be impacted by a greater or lesser dependence on the resources provided by the headquarters in the area of technologies, financial resources, and skills as well as the power-based organizational interdependence demonstrated in control or autonomy in the practice adoption. Accordingly, if a subsidiary is more dependent on the mother company, it is likely to adopt the isomorphic approach or simply comply with the standards. Applying this principle to DM practice, it can be argued that due to the lack of resources, whether they are transferred by the HQ or acquired locally, the subsidiary may be exposed to a greater risk of failure in practice adoption regardless of the internalization effects. In this spirit, if a subsidiary lacks the financial resources to provide trainings or sponsor the diversity networks, the transfer can turn out to be a failure.

Identification of a subsidiary means a sense of belonging to a global company. According to this hypothesis, if members of a subsidiary experience an emotional attachment to the organization, they will be likely to perceive the global practices as less strange and more like “their own” and be less likely to reject it.

However, the intercultural management studies (Chevrier, 2015) suggest that identification with the national culture may be in conflict with the identification with the Group values, as *“the culture can be assimilated to a set of values”* (D’Iribarne, 2012, p. 3).

Finally, a transfer of certain tools, such as code of conduct may be challenged, because it underpins the organizational culture and the values of an organization and local actors who adopt it.

Organizational context: Compatibility and Favouring



The inter-organizational compatibility is defined as the fit between the values infused in a practice and the values underpinning the organizational culture which shapes the organizational identity (Barmeyer & Davoine, 2011). Also, a successful transfer may be negatively affected by the fact that a new practice is a recent “fashionable” phenomenon and is not compatible with the existing policies. For example, the specific culture of the industrial company may be less compatible with the values of imported practice, as they may affect the overall functioning of the core mission, such as manufacturing process. It could be argued that incompatibility with the management principles may be perceptible especially in the given sectors characterized by the strong professional culture, for example engineering culture.

In sum, the institutional theory laid the basis for the consideration of both the internal and external context of the organization which may impede or foster the adoption of management practices. What is interesting in Kostova’s theory is that the institutionalization process of practice may be evaluated within time in a particular organizational setting and become a more or less legitimate practice. The circumstances of transfer inform about its sustainability.

However, Kostova’s theory (1999) does not allow to fully decipher the issues of legitimacy in the transfer of practices in Poland, because it is based on the premise that people make sense of the practices in terms of psychological and cognitive patterns, rational judgments, normative schemas and stereotypes, rather than based on the differences between the national values at the levels of the home country and the recipient country. There is a number of intercultural studies which draw on Kostova’s theory (1999), but approach a transfer with the implicit assumption that the national cultures viewed as the “*shared framework of meaning*” (D’Iribarne, 1989) play an important role in practice implementation. Both literatures, the institutional theory and the intercultural management studies, agree on one important point according to which: “*a subsidiary’s members’ perceptions about the value of the practice is influenced by a highly social and interpretive process*”. This brings us to the next section.

## 2.5. Cultural challenges in cross-national transfer

There are numerous studies in different national perspectives showing the role that culture plays when practice is transposed to a different cultural context than the one in which it was

initially developed (D'Iribarne, 1998, 2008; Henry, 2012; Saleh, 2015; Segal, 2009). This section is of particular interest for the thesis, as we will see in findings section that the case of Poland reveals the confrontations between the corporate value-based policies and practices and the locally recognized values that underpin the management tools and practices. These studies refer to various management tools such as: code of ethics, the corporate principles, the organizational culture and so on. It will be shown that the "universalist" theory of management transfer, arguing that the practices can be easily and smoothly integrated anywhere regardless of the context, under the condition of a good leadership, does not apply to the Polish case study. Similar arguments are supported by a number of studies in comparative management that are discussed further.

The scientific observations from different countries show that the transfer can be challenging in different parts of the world, for instance from Western parent companies to South countries in the Asian and African region, from Mexico and Morocco (D'Iribarne, 2003); Vietnam (Henry, 2011); Egypt (Saleh, 2015); China and Jordania (D'Iribarne, 2008; 2012) and the case of distant Oceanic cultures such as New Caledonia (Segal, 2017).

D'Iribarne (1998; 2009) has conducted several empirical investigations and demonstrated how a national culture can shape the organizational discourse and explain the cultural adjustments of imported management tools and practices. He has defined the notion of culture as: "*a shared framework of meaning*" (D'Iribarne 1989; 2008; 2012) which allows the local employees to make sense of the everyday situations accordingly to a cultural area from which they come from. In other words, an employee of French nationality working for a company's subsidiary based in Poland is likely to interpret management actions and decisions based on the cultural references that prevail in the French context.

Accordingly, in each society, there are different national figures and narratives which reveal the biggest threats and fears of people within society (for instance the loss of freedom in the US). The local actors understand the daily situations and problems in the workplace through the lens of the interpretative framework underpinned by the classifications and representations that are made in the form of implicit judgements about the immediate reality. In fact, these implicit conceptualizations allow explaining the resistance to imported management practices which may be considered to be a "threat" for local people. It is possible to identify it using a rigorous methodology, a meticulous and deep analysis of the social

framework of meaning through the analysis of people's conversations, interviews and observations of the immediate organizational environment. The empirical investigations by D'iribarne (1989; 2002; 2008; 2011; 2012) laid the basis for the following question: to what extent may the national cultures impede or foster the transfer of management methods from one country to another and from one organization to another?

Henry (2011) examined a translation of the code of ethics of the French cement company "Nexus" in the local context of Vietnam. It is shown that the French version of the code of ethics may be a subject of local resistance, because it is judged in terms of the internally accepted social regulations and individual judgement of French employees who are focused on their "individual commitments" towards the idealistic values of the ethical environment. While their Vietnamese colleagues view the code of ethics as a mean to develop the moral values which are part of the Confucianism education (Henry, 2011). This study is interesting for the present thesis because it highlights the French idealistic values of "equality and integrity", as well as the ambitious and abstract idea of ethical values in the workplace which goes beyond the "survival logic" specific for the ex-communist countries (Obloj & Weinstein, 2002). It is worth mentioning that most French companies tend to develop diversity policies, while referring to a larger principle of equality embraced in the French politics and institutional law (Doytcheva, 2009).

In a similar perspective, the doctoral dissertation of Saleh (2015) provides important lessons about a cross-national transfer, arguing that practices and whole concepts of management in one area of the world and a particular organizational setting may not be appropriate in another country, due to the divergence in the national and organizational cultures of a home and host country. The thesis draws on the analysis of the implementation of the code of ethics from the French headquarters of Lafarge to the Egyptian subsidiary . However, her work shows that the issues of transfer are much more complex than this, as they involve constant interactions between a tool and stakeholders. The author argues that the study of international management transfer:

*"should take into account the cultural roots of the management tools illuminating as they explain the apparent contradictions between the actual use of these tools by the local actors and the way in which they were designed by the initial designers".*

(Saleh, 2015, p.305)

Another study on the Lafarge Group applies to the comparison between the French and the US versions of the Group “Principles of actions” and codes of ethics, which revealed that the western “way of living together” may produce hybrid forms (Segal, 2017) which have a different meaning in the Chinese and Jordanian subsidiaries. The study provides a constructive and very detailed analysis of the written documentation seen from various angles, which shows the extent to which western values are met with resistance and gain a new meaning in the Asian world. One of the relevant questions posed by the author concerns the fact that the American corporations are in a particularly powerful position regarding the subsidies that are located in less wealthy parts of the world. In a similar spirit, Yousfi (2013) examined the process of hybridization of management practices in the post-colonial context of a Tunisian subsidiary of a French company and highlighted that less developed countries may develop forms of resistance towards the transferred practices from economically advanced economies.

Segal (2016) draws on Kostova’s theory to examine the challenges of international transfers linked to motivational management tools regarding a French company's HR in Vietnam. The local contextualization of motivational practices reveals the interference of the national culture as well as the organizational factors. The transfer is impacted by the Confucianism tradition to respect seniority and hierarchy and the priority of harmonious human relationships (collective cultural spirit). Vietnam has followed a similar path to Poland, as it has shifted from a centrally planned to a market economy. The Vietnamese resistance is concerned with the abstract ideas of employee entrepreneurial spirit, freedom in the workplace, as these values are in contradiction with the cultural traditions espoused by the Vietnamese model of national education.

Another interesting insight is that the local employees can become more familiar with “modern tools” of management within time, due to greater international openness in terms of the employee training and visits to the headquarters. This means that the transfer is a socially constructed process, as the employee’s attitudes towards the practices can change over time and be adjusted through social interactions.

Different issues of transfer are often approached in the context of the European subsidiaries of multinationals. While an important number of studies are focused on the European subsidiaries

of US corporations, Fortwengel (2016) examined the case of a German company's US subsidiaries, arguing that the success of organizational practices' transfer depends on the so-called "internal" and "external fit".

The *"internal fit refers to the important condition that a practice should be aligned with organizational goals and must gain support internally"* (Fortwengel, 2016). While external fit means that *"a practice must gain support and legitimacy in the environment"*. This study provides the basis to consider that the successful implementation of a practice "after the transfer" may be determined by internal organizational factors, such as sector and employee acceptance as well as external factors which refer for instance to a legal framework.

Also, Fortwengel (2016) points out that a number of other conditions should be met in order to establish a successful transfer of training practices, for example support resources and the engagement of stakeholders and work colleagues.

Barmeyer and Davoine (2011) recognized the hindering effects of divergent national cultures on a transfer of codes of ethics to American multinationals French and German subsidiaries. In fact, American firms tried to establish a global corporate culture based on regulated employee behaviors and collective management practices. The local reception of the codes of ethics was rather problematic, mainly due to the inconsistency in the institutional framework (internal regulations, legal framework) and cultural framework (cultural context, different representation of "ethics"). Furthermore, the lack of credibility and the superficial character of the American practices has led to the local forms of resistance reflected in mockery and ironic attitudes coming from employees. It seems interesting to cite a fragment of the interview:

*"The illustrations are very American, for example, the women, the minorities and the «colored people », and the style remains very naïve. It makes everyone here laugh"* (Barmeyer & Davoine, 2011).

Finally, it is argued that resistance does not have to be automatic in all the sites of a single subsidiary, because it can be more open and visible in some regional sites, and be less perceptible in others. It is argued that:

*"Resistance is not a cultural or institutional automatism: not all the subsidiary actors use the possibilities of the institutional context to resist to the headquarters. The differences observed*

*on the sites clearly show that the organizational context, the history and the identity of each site, as well as the individual strategies of local actors, play an important role in the phenomenon of resistance”.*

(Davoine & Barmeyer, 2011).

Ferner et al. (2001) studied the host-country's effects and the recipient country's effects on the partial contextualizing process of the US human resources “best practices” (employment and performance related practices) in German multinationals located in Britain and Spain. The authors suggest that the Anglo-Saxon models of management are often based on the abstract discourse of “visions”, “credos” and corporate missions, supposed to foster the utopian idea of a collective organizational success. However, the HR practices in the German context are interpreted rather in rigid numbers such as profit numbers. The transferability of the “one size fits all” performance-related practices may be limited by the domestic limitations e.g. the institutional framework which is regulated by the work of local offices.

The transfers within multinationals can be a vector of cultural modernization and rise in the competitiveness of businesses in Eastern Europe (D'Iribarne, 2012). It seems that a transfer may be a mean to enhance the international experience of Polish employees and enhance the cultural change of business only two decades after Communism.<sup>14</sup>

## 2.6. Transfer in the post-communist countries

*“The rapid economic, social and political transformation in CEE countries makes understanding the culture more challenging for researchers, with the result being a lack of knowledge of management practices and work relationships in post-communist countries”.*

Skuzaj et al. (2013)

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<sup>14</sup> In 2004 Poland has joined the EU, which can be viewed as the milestone in bringing the international dimension in management in Polish firms.

The transfer from well developed countries<sup>15</sup> to less developed economies has gained an interest in the post-colonial management studies in the context of the Arab world (Yousfi, 2013) as well as in intercultural research in the context of post-communist countries, in which the western models became to some extent the synonym of internationalization and cultural modernization (Obloj & Thomas, 1996). Both kinds of literature question the challenges of converging western management practices and attitudes across the world. Many scholars in management underline the scarcity of studies on transfers in post-communist countries (Skuzza, 2013; Waters-Sobkowiak et al. 2018) because there is an inadequate assumption of the convergence of management models in the context of European subsidies. Obloj & Thomas (1996) highlighted that the functioning of the communist firms was based on the informal (for example political power games), and for that reason the actual formalized, written guidelines and policies conceived in the western organizations were and still are of high importance for business in Poland.

According to May et al. (2005): *“Transitional economies are marked by tumultuous change, uncertainty, and confusion”*. In addition to this, (Michailova & Hollinshead, 2008) examined the transfer of western practices of employee training in Bulgaria and Russia, arguing that *“managerial actors strive to make sense of, and respond to, environmental uncertainty and change”*.

The next section outlines the tensions and cultural confrontation faced by the states within the CEE region, applying a special lens for post-communist countries. Why? Because, scholars argue that the communist heritage is an important and recent part of Polish history which may explain to a certain extent why some western applications in management meet with backlash.

#### Transfer imprisoned in the cultural constraints of the communist past.

Skuzza et al (2013) examined the transfer of talent management practices in 58 companies in Poland, arguing that the so-called “traditional” management practices continue to disseminate

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<sup>15</sup> According to OECD, less developed countries have a lower level of income and can be defined as “catching up” economies” or simply more poorer countries. However, according to different theories, the denomination is more complex and depends on the country’s particular context and history, social and political dimensions compared at the international level. Poland is considered as a “evolving economy” or one of the “transition economies” which have experienced social and political transformation after 1990.

in Polish firms, due to the persistent effects of the transition process from a closed to a free market economy. Skuza et al. (2013) argues that:

*“Management techniques widely used in the western economies did not solve the issues. Polish management practices faced the problem of the constant interplay between deeply rooted “survival patterns” developed under communism and superficial values “hastily” imported from the West”.*

(Skuza et al. 2013).

The above-mentioned statement suggests that the transference of management practices in Poland may be even more problematic because the management practices are rooted in the so-called “survival patterns” of organizations built under the communist regime and characterized by the economic and social instability in the beginning of the 90s. In addition, the way in which the transfer occurs is also important. In other words, if the practices are rapidly imposed, they may instil a sentiment of insecurity and a high level of uncertainty and produce the opposite effects of resistance towards the “transferring” forces from outside the country.

Waters-Sobkowiak et al. (2018) proposed a continuation of the research of Skuza (2013) and argued that under the communist regime, Polish firms were concerned more with the survival of the company on the domestic market and attempted to take a position of defence against the severe circumstances of those times. These firms rejected the idea of cultural change in terms of looking for new skills in a new free economy, long-time planning, and even innovation and creative thinking, the values promoted by the American corporations.

*“Unfortunately, this behaviour and mentality, shaped by Poland’s history, still exist in parts of Polish society today, and most visibly in the workplace, making communication and management especially challenging and difficult to change”.*

Waters-Sobkowiak et al. (2018)

Obloj & Thomas (1996) explained that the lack of innovation in the times of centrally planned economy was determined by the high control of local authorities which attempted to regulate and most of the management practices. The author also argues that the over-focus on the production-related issues in state-owned companies and the so-called “engineering culture”



was predominant in the communist organizational structures and therefore was focused on technical and functional dimension of management in order to “make things work”. An important question is whether the excessive bureaucracy in public firms, characteristic of socialist times (Weinstein & Obloj, 2002) might have an impact on the negative perception of the written policies coming from the headquarters, diversity policies in particular. With regard to diversity management, the answer is not straightforward. On one hand, the diversity policy may be viewed by local employees as unnecessary compliance engagements which do not create the new patterns for action. On the other hand, the Polish scholars attach less attention to the public sector with trade unions traditions. The grey literature and the NGOs reports (Gryszko, 2009; Andrzejczuk & Strzelczak, 2017) suggest the lack of interest and evidence of the implementation of DM (for instance Diversity Charters) in the state-owned companies in Poland.

Globokar (1995) examined the cultural adjustments in the transfer management techniques, in particular, quality-management standards by the French automobile company Renault to the automobile company in Slovenia in 1991. The study dates back to 1995, 7 years after the emergence of the take-over by Renault, but is particularly noteworthy for the thesis from the theoretical standpoint and methodological perspective, as it is one of the rare studies conducted at the level of the industrial plant. Before examining the main insights of the study, it seems interesting to expose some of the similarities between the Polish and the Slovenian context. First, from the historical standpoint, both countries have a socialist-past and gained national independence after the turbulent wars. From the economic plan, the development of the national economy in Poland, as well as Slovenia, was followed by a wave of massive privatizations of the national companies by western investors.

Another study draws on the Polish case study and focuses on the transfer of “Anglo-American” HR related practices and management philosophy in Poland between 1996 and 1999. The study shows that the nationality of the country where the practices are exported, has a considerable impact on the local interpretation. One of the findings is that state-owned Polish companies were predominantly concerned with operational issues, rather than the creative, strategic and ambitious objectives and therefore the HRM is viewed as an example of long-term strategic thinking.

This is explained by the fact that during the communist regime, the primary focus was put on the “social, welfare activities, record keeping (sickness and accident”) and the professional development programs dedicated exclusively to managers with a level of seniority. Also, the authors show the findings of contrasting nature in the public, mainly administrative companies, where apparently employees holding the traditional administrative roles are more concerned with the operation issues rather than the abstract soft management practices and people-based tasks. What is particularly interesting is that after the Polish subsidies adopted HRM practices for the first time in the '90s, the limitations were the following: the narrow perspective of the Polish legal framework (Code of labour), the national culture and different economic development of the local units within the country.

Nowadays, despite this persisting scepticism, the authors (Waters-Sobkowiak et al. 2018; Skuza, 2013) argue that the workplace is more and more dominated by the generations of young people, especially the Millennials generation that is more enthusiastic and eager to learn from the Western experience. The authors also highlight the role of expatriate managers who played an important role in the establishment of a culture of openness towards new practices and communication with work colleagues outside the internal organizational setting and was viewed precisely as *“the key to transfer the global corporate culture”*. It is interesting to mention one of the fragments of the interviews, as the Polish manager stated that:

*“Expatriate managers have a pretty important role because, before, we were separated by a political system since World War Two. We were told that anything foreign was the enemy. There was a chaotic style of management (...). Sometimes we think that the systems from the UK are too bureaucratic... Generally speaking, Poles are very open to foreign influence . . . for instance a British manager’s opinion is considered more important than that of a Pole.*

(Manager, SoapCo, female, Polish, November 1998; in Ruth et al. (2005)

The above-mentioned hypothesis about the Polish resistance to “other” which may impede the cross-national transfer of practices has been confirmed in another study by Hurt & hurt (2005) on the transfer of practices from France to Poland in a retail sector. The authors argued that the Polish employees are often opposed to change because change means “unknown”, a “risk” or even *“a threat to its existence”*.

The attitudes of creativity and the “entrepreneurial spirit” were not recognized under the communist times, because the managers always had “the last word”, as they were appointed by the political party. The Polish employees were expected to execute exactly what was asked of them, especially in the sector such as retail or manufacturing. In addition, a “silence and resistance” are among the key elements of the portrayal of Polish employees during the communist times, and apparently, resistance in Polish firms took the form of “indifference”, or a “passive resistance”, which was also visible in the social attitude towards the communist regime. The authors argue:

*“The expatriate managers began to make serious efforts to fit in with their teams, joining in Polish style parties and participating in local customs, including learning to drink Vodka instead of French drinks”. (Hurt & Hurt, 2005)*

Similar findings were identified in the case of firm A, where the French Directors were supposed to taste Polish beverages with the local workers in order to know each other better and create a relationship of trust between the superiors and subordinates at the level of a production plant.

In the same spirit, it is shown that when French expats moved to different companies, Polish employees were directly promoted to higher positions. A similar finding was identified in the former public manufacturing firm (case study of firm A), as after the sale of the company, the French Executive Members were replaced by the Polish counterparts.

Accordingly: *“This broadened Polish empowerment and increased pride and belonging. Recruitment was also put in the hand of the Polish category and department managers. Gradually group performance bonuses were added in to create real team identity”*

Hurt & Hurt (2005)

Another study (Globokar, 1989)<sup>16</sup> suggests that the transfer may reveal the issues of the history of the recipient country. It is a comparative analysis of the Polish cement plant and the French headquarters and is based on the factors such as employee cooperation, relationships and

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<sup>16</sup> The findings date back to 1987. The author remarks that the findings (the employee attitudes) may be determined by the high control, regulations and rigid management principles in the organizations which are characteristic for the period before 1989.

behaviour (the idea of “working together”). The research provides a number of interesting insights from the Polish plant. Regarding employee relationships between the workers and their superiors, it is shown that communication is based on the principle of working like “a colleague with a colleague” or “a Pole with a Pole”. This means that it is easier for the workers to create a relationship of trust with the colleagues with whom they worked for a long time in the same company and whom they know well, in particular, if they are issued from the same culture. The authors suggest that the workplace is dominated by the “Polish norms” and depends on “how things are done in Poland” (p.64). Also, the authors argue that there is a pride that is shared among Polish employees related to the belongingness to the same workplace representing the image of “the battlefield”. This may show that the employee mentality in the workplace is somehow shaped by the past experiences of wars for the survival of the country.

The author argues:

*“It is obvious that the fight for the survival of Poland is reflected in the organizational life as well. However, it is not only the temporary phenomena but rather the permanent way of doing things which has roots in the long and turbulent history of the country”.*

(Globobkar, 1987)

In 1989 Globobkar examined the impact of the forms of the traditional cultures forms in Bosnia and Herzegovina on the local authority’s representation, as it can be exercised in the industrial environment. In fact, the German and Austrian invasion of Bosnia and Herzegovina has left traces on the construction of the regional authority and the establishment of the relationships within the regional communities. The local historically constructed “role models” represent the local authority and the familial hierarchy within the communities where the principle of paternalism prevails.

More recently, Drucker & Dalton (2012) examine the transfer of HRM practices in one of the post-Soviet countries in EE, Romania, arguing that the context of national history and culture may have impacted the way in which HR practices are adopted or omitted in the context of the Romanian subsidiaries of Anglo-American (one South-African joint-venture) and Austrian and Swiss mother companies. The insights demonstrate a dichotomy between the traditional values inherited from the communist era (such authoritarian and directive management style,

neo-paternalism, strong hierarchy empowered by mistrust) and the flexible, open and transparent practices, based on the neo-liberal ideology.

Özbilgin (2005) suggested that the Diversity management practices focused on individual concerns with equality and a meritocratic approach are issued from neo-liberal ideology.

Another case study of the steel company shows that despite the adoption of global HRM policies, the “soft management” initiatives, such as the definition of the leadership role at the production level, were interpreted in a way to address the “hard”, pragmatic management ideology focused on the performance and the better communication between the “manufacturing” to facilitate the production planning. This adds to the argument that in the post-transition companies, the HRM practices may be viewed in a pragmatic way and focus on the formal aspects which allow the companies to “survive” and remain competitive. While Diversity management practices are considered in Poland to be “soft management” and value-infused initiatives which address the issues of the human workforce than the conditions for organizational survival, refusing another argument of western companies that diversity management is the key to address the demands of diverse communities and customers.

In a similar spirit, the study by Ruth et al. (2005) examined the knowledge transfer in Russia showing how Russian managers and directors had to deal with frustration, disappointment, resistance and lack of the sustainability of the management programs. First, it is shown that employees from older generations who have experienced the Soviet era may strive to keep the values that were promoted by the communist government, and this is apparently the most visible in manufacturing companies, in particular these located in the regional areas rather than big cities. Second, the cross-national transfer in direction of Russia is considered as a mean to enhance the “culture of openness” for local managers and the whole organizations, through the experience of emerging international projects, employee communications, etc. However, this finding is unique for the transition economies and applies specifically to the transfer of knowledge, which is a relatively new phenomenon in Russia. Finally, the lessons from Russia show that in order to make the imported programs sustainable, they should be “*built upon more deeply felt values, attitudes, and behaviors*” (Ruth et al. 2005) in order to preserve the sustainable character of imported programs.

## 2.7. Conclusion

Management transfer from the headquarters-subsidiary perspective is discussed by two distinct theories: “the universalist” or the “culturalist” (Segal, 2011) and “the contextual approach” (Brwester, 2007). In fact, the institutional theorists acknowledge the unfit character of the American “universal paradigm”, while assuming that management practices can be implemented anywhere regardless of the institutional contexts of the recipient countries (Ferner et al. 2005; Myloni et al. 2004).

Taking a closer look on a process of transfer seems to be quite relevant, as there is a plethora of DM features which run under the heading of “strategic practices”, such as: policies, programs, strategies, tools, trainings, practices to events. Kostova’s theory allows to question sustainability of organizational strategic commitments and deliberate on a continuous character of organizational learning process in the context of DM. It appears that the transfer of management practices in Poland is not entirely obscured by the communist past, due to the managerial transformations of Polish firms and a significant transfer of knowledge, skills and experiences (Obloj & Thomas, 1996). The Kostova’s theory (1991) allows to enlighten the challenges that Polish organizations face in order to overcome the pressure of institutional environment, but also permits us to see the positive alternatives for integration of DM policies, such as the Diversity Index.

The institutional theory needs to be accompanied by the intercultural perspective (D’Iribarne, 2012; Chevrier, 2015; Segal, 2017) which expands a scope of the research into the new countries and industries. These comparative studies constitute a relevant framework to study DM phenomena across time and place. Currently, there is an intense socio-political debate over the notion of cultural diversity and recruiting policies of companies (Vassilopoulou et al. 2013). Thereby, it is necessary not only to highlight what differentiates societies, but also what separates communities within each society (D’Iribarne, 2009). These insights call to examine history in management research, in order to understand nationality-related issues in Poland, which will be presented in the next section.

### 3. CHAPTER Three – The Polish context

### 3.1. Introduction

*“It is about a way of dealing with what could be called plural identity, which is endorsed and claimed as a norm compatible with the feeling of national identity and citizenship, and which I suggest should be called that of the Man of Confluences. The man of confluences is often cosmopolitan, by his own nature, but he does not feel obliged to make a doctrine out of it. He does have cosmopolitan ways but it does not prevent him from feeling close to his “small fatherland”: “to be the ardent citizen of a budding nation is also to be a friend of mankind, a European. True cosmopolitanism accepts the national soul”*

*(Nowicki, 2000)*

The idea that DM developed in each country and is marked by a certain vision of a social life that influences political institutions and organizations is relatively new (Chanlat & Özbilgin, 2017). The international DM literature has recognized a large panorama of organizational studies conducted in several countries which call for the consideration of power and limits of the national contexts. Yet Poland has not appeared among the studied countries, especially those adopting the in-depth qualitative methods of organizational inquiry.

It was clear from the beginning of the doctoral research that diversity management in Poland is deeply constrained by the national context and for this reason does not fit with the dominant ideas of DM that have been initially developed in multi-ethnic and immigration societies like France and the US. Poland is one of the most homogeneous countries in the world. In this respect, one could assume that the attempts to reconstruct the national identity which occurred throughout the history of wars and oppression, resulted recently in the ignorance of biological dimension of diversity of nationalities in the employment sphere and the rejection of the overall western practices of Diversity Management in the Polish business environment. Yet in the past, the cultural, ethnic and language diversity was a familiar concept in the Poland of two nations (Kingdom of Poland and the Grand Duchy of Lithuania as well as the Kingdom of Poland-Lithuania, Bohemia and Hungary), with reference to Belarus, Lithuanian and Ukrainian populations. The simplistic assumption of a Polish antipathy towards a variety of



cultures within society is misleading. Therefore, a historical conceptualisation of the notion of diversity should also take into account a democratic progress, liberalization of human rights and an increasing participation in the life of the international community. Poland is part of the so-called “Middle Europe” (Kundera, 1983; Nowicki, 2010), in the way that it is in transition with liberal values of Western Europe and geopolitical affiliation to the Eastern bloc.

To attempt to understand the rejection of the neo-liberal values of diversity as well as the Polish grasp of practice within organizations, the thesis must take into account the conflicting facets of the Polish context: on one hand the passion for the patriotic attitudes, national symbols and the safeguard of the national identity (Bartminski, 2002) which makes the external context unfavourable to a fully open discussion of the issues of diversity of nationalities and related risks of discrimination. On the other, Poland has experienced the juridical and cultural progress fostered by the institutions of the EU, the NGOs no less than multinational corporations.

One of the very first reports on diversity in Poland by the Polish NGO (Gryszko, 2009) which is responsible for the promotion of the Diversity Charter in Poland, starts with the section which argues that the discussion of diversity in Poland is a discussion “about wounds” caused by the turbulent war history that was marked by several defeats and an ethnic homogenization process. It indicates:

*“In Poland, the theme of diversity is not a neutral topic. You can even say that it is a culturally and historically “swollen” topic. The conversation about diversity in the Polish context is a conversation about wounds. That’s why it is a difficult conversation (...). It’s about Poland, from before the dictates of the USSR, Poland from before Auschwitz and Katyn, Poland from before fascist-Soviet aggression, Poland before the partitions. What’s the link with managing diversity in business? This kind of experience enters the national bloodstream and becomes a kind of collective unconsciousness, unconscious, which we all breathe”.* (Gryszko, 2009).

According to numerous scholars in management (Taksa & Groutsis, 2013; Chanlat, 2017; Vaara, 2019), the concept of diversity underpins the historically constructed representation of “other” often neglected in DM research (Haas & Shimada, 2005). This chapter acknowledges the historical construction of the Polish national identity or the so-called

sense of belonging to the Polish nation and a collective memory (Nowicki, 2002; Mencwel, 2002), which is important to understand the problems with diversity management in certain organizations, in particular on the ground of nationality.

This section neither based on the social identity theory (SIT), which attempts to explain how people identify themselves and act within different social groups (Taksa & Groutsis, 2013) nor the theory of identity politics which is focused on the construction of political alliances within the group of people sharing the same ethnicity, religion or cultural identity. The strong focus is on how scholars specifically define the concept of the Polish national identity and national imaginary (Bartmiski, 2002). The analysis of grey literature, research reports and articles in social politics and history presented a particularly valuable source of information for this thesis. Following Mencwel (2002), the complex and multidimensional concept of “national identity” requires developing a framework of different ideas presented in a transdisciplinary research, including history, anthropology and sociology.

The first part of this chapter explains the differences between the definitions of nationality and ethnicity to better understand the choice of terms in the Polish organizations and understand why the multiculturalism debate in Poland is different than in the typical western immigration societies.

Afterwards, it is necessary to examine the interplay between citizenship and national identity reconstruction, which allows to better understand “who is a Pole and who is not” and who is classified under the heading of the diversity of nationalities.

The third part will emphasize the current demographic homogeneity, with the main focus on the contrasting profile of Poland with the emigration of Poles to the West and also growing immigration each year, in particular from Eastern Europe. Here will be highlighted the insights from the domestic labour market and the implications for DM.

The political agenda finds its roots in history and therefore the questions about “Polishness” cannot be understood without consideration of the turbulent history of the country (the three partitions of Poland, World War I, World War II) and two different visions of Polish society rooted in the Piast/Jagiellonian tradition between the Xth and XIVth century. A historic-political image of Poland cannot be fully captured without reference to the recent phenomenon of a

cultural transformation from the communist era to the EU accession. This chapter describes the scientific methods, theories as well as the selection of the historical events which are the most relevant for the thesis projects. Selected moments from national history were chosen to help frame the historically constructed concept of DM.

Before proceeding to the next section and considering the plethora of countries studied through the lens of DM, it is interesting to explain why it is interesting to study DM specifically in Poland. For instance, the overlapping of the Polish literature and the public reports demonstrates particularly contrasting characteristics of the historical, political and demographic heritage. The following figure briefly summarizes the specificity of the Polish context.

| Dimension    | Argument                                                                                                                                                                                                                                                                                                                                                                                     |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Geopolitical | Poland is one of the biggest countries in Central and Eastern Europe, located at the transition of influencing countries such as Germany and Russia.                                                                                                                                                                                                                                         |
| Economic     | The only European economy that avoided economic recession in 2008 with GDP of 524.5 billion USD (Eurobarometer, 2017, The Economist, 2014). Even though Poland is considered as a “transition economy”, Poland was the first CEE country to join the group of developed countries in less than 30 years after communism.                                                                     |
| Political    | Despite the major social and political transformation from the non-existent legitimate status of the country to the democratic country based on European values, Poland is an interesting case study regarding the implementation of the liberal-based management practices (Obloj, 2002) including DM. Two conflicting facets are identified: rise in nationalism and European integration. |
| Historical   | Polish history is particularly turbulent because of the wars which led to the loss and regain of the national identity.                                                                                                                                                                                                                                                                      |
| Demographic  | Poland has undergone significant changes in the ethnical structure and has shifted from a heterogeneous country in the past to a homogeneous country and currently is one of the most homogenous countries in the world.                                                                                                                                                                     |

*Figure 17 Five dimensions of the Polish context.*

### 3.2. Construction of citizenship

Different conceptualizations of DM across the world start with very basic definitions. In the US, mainstream terms such as “nationality” or “ethnicity” are interchangeably used in the corporate policy documents and they refer mostly to a large ethnic make-up of the American population that is highly diverse in terms of ethnicity. The US term is historically founded on the history of slavery and is formulated intentionally in terms of racial differences. In the

immigration societies, for example in Germany, DM is understood in terms of “ethnicity” which is a problematic part of the national political debate (Vassilopoulou, 2015) and thus makes its appearance in the organizational policies.

The classification of ethnic minorities, which explicitly dominates the US mainstream debate around diversity and implicitly hinders the French discourse on equality, is not compatible with the Polish conceptualization of citizenship. The non-discrimination legislation in Poland recognizes both terms, “nationality” and “ethnic minorities”, but the term “nationality” appears more often in the organizational policies at the compliance level. Conversely to the western societies, Poland has been focused on intra-national monoethnic make-up caused by the transformations of the Polish national identity (Iglicka, 2001; 2010). It is forbidden in Polish firms to gather personal information regarding race, ethnicity or skin colour, because it is considered to be sensitive personal data that is protected by the European Directive (Directive 95/46/ EC) Data Protection Act (2018). The respect of the Directive in the Polish firms is enough argumentation for the non-collection of diversity statistics, except gender.

Gorny & Pudzianowska (2010) argue that Eastern European countries, including Poland, view ethnicity as a concept relating to ancestry, rather than official citizenship. It will be shown further that having Polish ancestors is the pre-condition to obtaining Polish citizenship and most importantly to be considered as a Pole. For instance, the question “What is your nationality?” in the national census is understood as “the national or ethnic affiliation and should not be confused with citizenship” (Gorny & Pudzianowska, 2010). The ethnic census was established in Poland for the first time in 1921, allowing the citizens to self-identify with an ethnic nationality (Vermeersch, 2007). Currently, the national census on ethnic diversity provides prefixed responses to the question on ethnicity and includes both ethnic and national minorities, as well as the religious belongingness. For instance, the census allows Silesians (ethnic group in the region of Silesia with German ethnic and cultural influence) to identify themselves as an ethnic group in Poland. However, Silesians are considered by the Polish government as Poles only with a specific dialect (Lodzinski, 2012). The 2002 census showed that a very low percentage (1.23 %) of the respondents identify themselves as an ethnic minority, which was regarded as proof of people’s fear to openly reveal a different ethnic affiliation in the homogeneous country which persists since communism (Buchowski & Chlewinska, 2010). For instance, the European Commission against racism and intolerance

(2018) argues that the Polish documents refer rather to “nationality” than “ethnicity”, arguing that nationality should not be understood in the sense of “citizenship” (Ecri, 2015).

The following figure illustrates the differences between the national and ethnic minorities in Poland.

| National minorities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Ethnic minorities                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>A group of Polish citizens living in the present territory of Poland for 100 years. A group of national minorities strives to preserve its language, culture or traditions that are different from the Polish ones. Its members are aware of their own historical community, national identity and identify with a nation organized in another country.</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• Belarusians</li> <li>• Czechs</li> <li>• Lithuanians</li> <li>• Germans</li> <li>• Armenians</li> <li>• Russians</li> <li>• Slovaks</li> <li>• Ukrainians</li> <li>• Jews</li> </ul> | <p>A group of Polish citizens living in the present territory of Poland for 100 years, which strives to preserve its language and culture or a tradition other than Polish, and is aware of its own historical community ethnicity, but does not identify with a nation organized in its own country.</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>• Karaites</li> <li>• Lemko</li> <li>• Roma</li> <li>• Tatars</li> </ul> |

*Figure 18 Ethnical and national minorities in Poland. Source: MSWiA (Ministry of Foreign Affairs, 2018)*

Representation of ethnicity in Poland is understood as ancestry and historical ties with Poland, rather than belonging to an independent ethnic group, as it is the case in the US. Ethnic and national minorities are present in Poland for more than a century and have developed ties with Polish culture and cultural institutions in the form of “folklore” (Nowicki, 2002). This makes the ethnic minorities a different group from the economic immigrants. Since the soviet times, the Polish authorities attempted to assimilate the national identities within the Polish society, allowing them to express their cultural differences in the spheres of art, culture, language, education (Nowicki, 2002, p. 541) but with certain limitations.

However, national or ethnic minorities are not seen as national diversity and should not be confounded with the “foreign” populations. In Poland, foreigners are viewed as immigrants whose stay and work permits are regulated by national law. Lodzinski (2012) argues that foreigners constitute a group of migrants from neighbour countries (e.g. Ukraine, Bulgaria, Germany) especially after 2004 (the accessions to the EU), coming to Poland for employment purposes.

Considering the term “foreigners”, according to the definition, foreigners are coming from “foreign land” (dictionary, PWN, 2018) while the national minorities have been present on the Polish territory for at least 100 years and were present in Poland before WW II. According to the definition by the Ministry of Foreign Affairs (2018), the national minorities attempt to preserve their languages, but it is common to see that the national minorities speak fluent Polish and are familiar with Polish history and traditions. In Poland, the identity of the ethnic minorities is strongly impacted by the process of “polonization” (Lodzinski, 2012) defined as:

*“the acquisition or imposition of elements of Polish culture, in particular the Polish language. ... To a certain extent, Polonization was also administratively promoted by the authorities, particularly in the period following World War II”* (Lodzinski, 2012)

The term “Poland” (Polish Polska) literally means “pole” (the field) and means the “land of the fields” or “the land where the tribe of Polanie lives” (Sadowski, 2018). In the current political debate, foreign immigrants are often labelled as “outlanders” (pol. Cudzoziemcy) which literally means people from foreign lands. Yet, the discourse of the organizations and the NGO’s shifted away from the political regulation and the negative connotation of “outlanders” towards the term “nationality”, as it is recognized in the Diversity Charter.

### Polish citizenship

Citizenship in Poland is determined by Polish law. The principle of “Ius sanguinis” (bloodline), as well as the principle of “Ius soli” (ground), provides the right to acquire Polish citizenship (Polish Embassy, 2018).

The hypothesis was confirmed by Bukowska & Wnuk-Lipinski (2009) who conducted a survey about the conditions of having Polish citizenship and asked the respondents about “Who is considered to be Pole”. The results reveal that one of two conditions should be met: ethnical origins (Polish parents) or the Polish territory (born in Poland). The process of redefining the Polish citizenship through history is marked by the process of the national democratization (Faist, 2009) and the reconstruction of the civil rights for Polish emigrants through “double citizenship” allowing Poles to regain the Polish citizenship and to repatriate. According to Faist (2009) the issues of the (re)construction of Polish citizenship are critical and should be viewed through the lens of the equality debate. In this sense, the

debate about social equality would refer to the civil rights and freedoms of Poles who have lost their citizenship as a result of wars.

The national legislation from 2012 provides a possibility of citizenship restitution for “foreigners” who have lost it before the democratic transition in 1999, or during communist times, or had to leave the country during or after the Second World War turmoil. Glabicka et al. (1998) explains that the process of Polish repatriation has been at the heart of the Polish government migration policy since 1996, as the repatriation recalls the memory of the return to homeland after exile. After WW II, it was a time of massive repatriation to Poland, as the statistics suggest the outflow of 4,4 million of Poles between 1944-1950, including from the USSR (Union of Soviet Socialist Republics (USSR) and Germany (Iglicka, 2001). The second wave of repatriation took place in the '50s mainly from the western part of Europe.

In the current legal sphere, working permits are subjected to some simplifications for foreigners from the neighbour countries that are not part of the EU, such as Belarus, Georgia, the Republic of Moldova, the Russian Federation, the Republic of Armenia and Ukraine. Foreigners from these countries may apply for the “Polish Charter” (Karta Polaka) in order to work legally on the Polish territory without work permits, up to one year. The Polish Charter provides foreign workers and citizens with Polish citizenship, meaning that they belong to the Polish nation and do not have to apply for work permits. This means that the easiest way for foreigners to find employment and avoid long administrative restrictions in Poland is to temporarily identify as Polish in writing, but not to acquire the Polish citizenship or confirm Polish origins. This privilege is offered only to people from neighbour countries whose citizens show a special bond with the country, such the intermediary knowledge of Polish language, Polish family bonds (one parent or grandparent to be Polish), or participation in the promotion of Polish language and culture. It allows for a self-identification with the nation which may be a legitimate practice that goes beyond legislation.

However, the Polish Card (Karta Polaka) is defined as “ethnic passport” *which is almost a legitimized certificate of “Polishness”(...) built upon the ethnocultural, romantic and mythologized vision of the nation* (Ladykowski, 2015).

### 3.3. The Polish national identity

*“Contacts with other people of Polish origin are treated as a symbol of Polishness, but this criterion is rather subordinated to the main indicators of Polish ethnic identity”.*

Lustanski (2009)

The social debate around cultural or ethnic diversity integration and the principle of “valuing difference” within the workplace finds its roots in the historical conception of national identity, particularly in national contexts (Chanlat, 2017; D’Iribarne, 2008; Taksa & Groutsis, 2013). Taking into consideration the variety of approaches for national identity in multiple disciplines (Holck et al. 2016), this chapter takes into consideration several definitions of the collective vision of national identity, with a main focus on the national imaginary (Delsol et al. 2002) and the sense of belonging to the nation that has been recognized by scholars in diversity management and sociology (Bell, 2003; D’Iribarne, 2008; Özbilgin & Woodward, 2004). Most importantly, Polish scholars in migration studies agree that the debate about the concept of “otherness” and unified national identity is the key to explain social intolerance, reluctance towards specific strands of diversity and the current ignorance of discrimination issues.

Özbilgin & Woodward (2004) examine the employment practices in the UK and Turkey and highlighted that the HRM practices, including recruitment and promotions, can reveal socially constructed forms of identity: “belonging” and “otherness” in the workplace. Belonging means the positive experience of being a part of the group, while otherness refers to the exclusion of workers seen as “outsiders” whose social perception does not fit the concept of the “ideal employee” assumed in the given cultural area.

For instance, the sociologist Philippe D’Iribarne explained in various studies (2008; 2012) that the concerns with the assimilation of immigrants in France and the recognition of the denial of ethnic discrimination have their roots in the tensions between the national identity and the concept of French citizenship. Chanlat (2017) explains that the tension between diversity and identity in the French context has its roots in the universal vision of the citizenship, which



denies the ethnic differences in the name of the national unity and equal rights of all citizens who belong to the French Republic.

Conversely to the French approach, the foundations of “Polishness” are strongly associated with the meaning of a shared identity and the power of belonging to the Polish nation rather than the citizenship construct. Some scholars define the Polish identity in terms of mentality and shared consciousness (Galbraith, 1997), while others (Delsol et al. 2002) define the Polish national identity as a historical construct of the collective memory influenced by the past turbulent history, which therefore emphasizes the sense of belonging to the national community.

Chlewinska & Buchowski (2010) highlight that the term “nation” in the Polish context is seen as “nobility” which allowed Poles to identify themselves with the Polish nation and distinguish them from the “barbarian” groups which invaded Poland in the past. Nowicki (2002, p. 548) explained that the Polish mentality of a “nobleman” was strengthened by the catholic traditions and the idea of the Polish foundations of European Christianity, which allowed Poles to face the confrontations with foreign enemies. The myth of “Sarmatian”<sup>17</sup> in a multi-ethnic Poland in the XVIIth century meant the unification of the cultural and linguistic differences under the Polish-Lithuanian Commonwealth. The national myth of Sarmatism emerged as a consequence of the attempts to transform a multicultural nobility into an ethnically unified national identity during the Jagiellonian dynasty. Sarmatians can be defined as *“nobility of the Republic which constitute a chosen nation designated by a great destiny to reign the world”* (Walicki, 2002, p.181).

The process of “polonization” has emerged as a response to imposed measures of Germanization and Russification dating back to the XVIIIth century, which now is seen as the measure leading to the complete assimilation of national and ethnic minorities. Bartmiski (2002) argued that the polonization process allowed for the safeguard of the national identity and sovereignty in the past and became the element of national mythology as well

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<sup>17</sup> “The name came from alleged ancestors of the szlachta (Sarmatians), and the concept served to integrate the multi-ethnic nobility”. (Britannica, 2019).

as a symbol of Polish superiority over western nations, but only after the loss of sovereignty in 1795. Before that time, Poland was an ethnically heterogeneous country.

What is interesting is that the Polish national identity was considered to be a means to “compensate for harms suffered during the communist era” and earlier in the past (Faist, 2009) and can be defined also as “a dimension of belief systems” (Faist, 2009). Kurczewska (2003) talks about the “collective consciousness” shared by Poles regarding the social and cultural affiliation to Poland as well as the Polish association with the EU.

#### What is “Polishness?”

Buchowski & Chlewinska (2010) highlight that one important matter is the self-identification with the Polish nation and the perseverance of socially accepted practices which do not require to have Polish citizenship, arguing the following:

*“Polish identity refers to the ethnic concept of a nation and cultural practices are considered Polish, provided that they can be legitimized as such (...). Having Polish citizenship is insignificant in the identification of individuals as ‘us’, because cultural closeness decides about social inclusion”.*

(Buchowski & Chlewinska, 2010)

Gorny and Pudzianowska (2010) claim that *“belonging to the Polish nation has not always meant belonging to the Polish state”*, which means that people with Polish nationality have not always been recognized as former citizens of Poland, for instance during the Nazi occupation. During the wars, Poles lost the national borders, but they did not lose their nationality nor their hope in the restoration of the national identity. The authors also argue that the French term “nationalité” means membership to a state and “citoyenneté” refers to the rights of the citizens, but there is no such distinction in Poland where the word “citizenship” is used for both terms (Gorny and Pudzianowska, 2010).

Surowiec (2017) in the doctoral dissertation referred to the Polish diasporas (counting around 20 million people living outside Poland) as an integral part of Polish society. Surowiec (2017) draws on the following citation of the Chancellery of the Prime Minister (2008):

*“Poland shall define its image and promote it professionally and in a consistent way abroad; this image is coherent with regard to identity and value with the image promoted inside the country, so as to – on the one hand – support the Polish citizens abroad [Office2] in their positive identification with the home country and with each other, and on the other hand create a positive image of Poland as a modern, dynamically developing country amongst foreigners”.*

(Chancellery of the Prime Minister of Poland 2008, p. 34, English original in Surowiec, 2017).

Furthermore, the term “Polishness” is loaded with symbolic meaning and is reflected concretely in the national symbols such as the flag and the Polish emblem<sup>[2]</sup>, and is manifested in references to national history. For instance, Polishness has been explicitly addressed in the political discourse. For instance, the Polish Prime Minister and member of the extreme-right party (PIS) announced during the celebration of the national flag day:

*“We are the bravest and the noblest nation (...). Nowadays, we can turn the difficult years of struggle into hard work for the Polish Republic, because Polishness is determined by the white and red flag, Polishness is a choice, Polishness is a state of mind and means solidarity, freedom, greatness and this is our way, which I strongly believe, will be taken by war veterans as well as the generations of Polish youth”.*

(Mateusz Morawiecki, the Polish Prime Minister, May 2019)

In 2019 the Polish government was met with a strong opposition towards the legislation project aiming to introduce the unofficial logo of Poland: “God, Honour, Fatherland” to the new passports. The addressed criticism points out that the legislation would violate the principle of neutrality and the respect of the freedom of beliefs. The expression “God, Honour, Fatherland” is a symbol of national patriotism and is considered as an unofficial national motto.

Mayblin & Piekut (2016) explained that the Polish identity refers to the national pride which is historically constructed and reflects a dichotomy between the feeling of “inferiority” (image of Poland lagging behind the Western countries) and the feeling of superiority over

other nations because of the perseverance of the cultural and religious homogeneity despite the western temptations and promises of multicultural societies. As the authors suggest, a safeguard of “Polishness” allowed the Polish poets and politicians on exile to self-identify with the Polish nation.

Numerous scholars argue that the national education system is an integral part of the institutional environment (Kostova & Zaheer, 1999) and therefore plays an important role in the legitimization of what is acceptable in society and what is not, including the legitimization of management practices. Messages about national bravery and patriotism persist in history lessons and the national literature, especially by the Polish romantic poets like Mickiewicz, Norwid and Sienkiewicz. The mainstream national education permanently recalls the creation of the nation and the recurrent myth of Poland viewed as “Christ of nations” (Zamoyski, 2006) which has suffered oppression from foreign countries and is an example for the rest of the European countries. The heritage of the romantic, patriotic literature is explicitly highlighted in the political program of the conservative party “PiS” which will be explored further.

#### 3.4. The turbulent history of Poland

*“The national identity is critically important to the lived experience of cultural diversity, particularly in the workplace where people spend most of their time. At the same time, they are significant for organizations most of which suffer from problems associated with ‘intergroup relations’, such as “us” versus “them” dynamics” (Taksa & Groutsis, 2013).*

Numerous articles on the Polish national identity create a strong link with history. The importance of history is seen in both aspects, the major changes in the national ethnic structure as well as the memory of the “lost and regained” national identity. Poland has struggled from foreign political and cultural domination for more than a century and there is a continuous fear of “being invaded” by a foreign enemy (Nowicki, 2002).

Poland suffered from wars and experienced consequences for the construction of its identity in several angles: geography (Poland was devastated during WWII, being located between Germany and Russia), political (lack of the national status of the country), demographic (loss of one third of the population and more than a million of Poles on exile) and cultural (memory of the terror and obedience, the inferiority of Poland seen as “occupied” which suffered oppression on behalf of the “occupiers”).

Next, there will be briefly highlighted selected moments of the national historical background: the three partitions of Poland (regain independence in 1918), World War II (the ethnical cleansing and occupation) and the after-communism transformation.

### The wars

By 1795 the term “Polish nation” had disappeared from use, as a result of the partitions by Austria, Prussia, and Russia. The Polish national resistance leaders were obliged to flee the country and became Polish authorities in “exile” (for instance Kosciuszko in Russia and Kolataj in the Austrian forces) (Zamoyski, 2006). On the territory of the Prussian occupation, the usage of the Polish language was suspended, and the German language education was introduced as mandatory in the education system. Any form of local resistance would be met with military force. Imposing foreign education and foreign language, as well as the annihilation of the Polish identity attributes in the national institutions (for instance the Polish emblem) have led to the creation of the national anthem by Henryk Dabrowski “Poland has not yet perished” mentioned below. Several authors (Zamoyski, 2006) highlight the fact that the annihilation of the Polish state contributed to the emergence of nationalist Romantic literature. Poland was partitioned by Austria, Russia and Prussia between 1772 and 1795. The following figure

demonstrates the geopolitical dependence of the Polish state during that time.

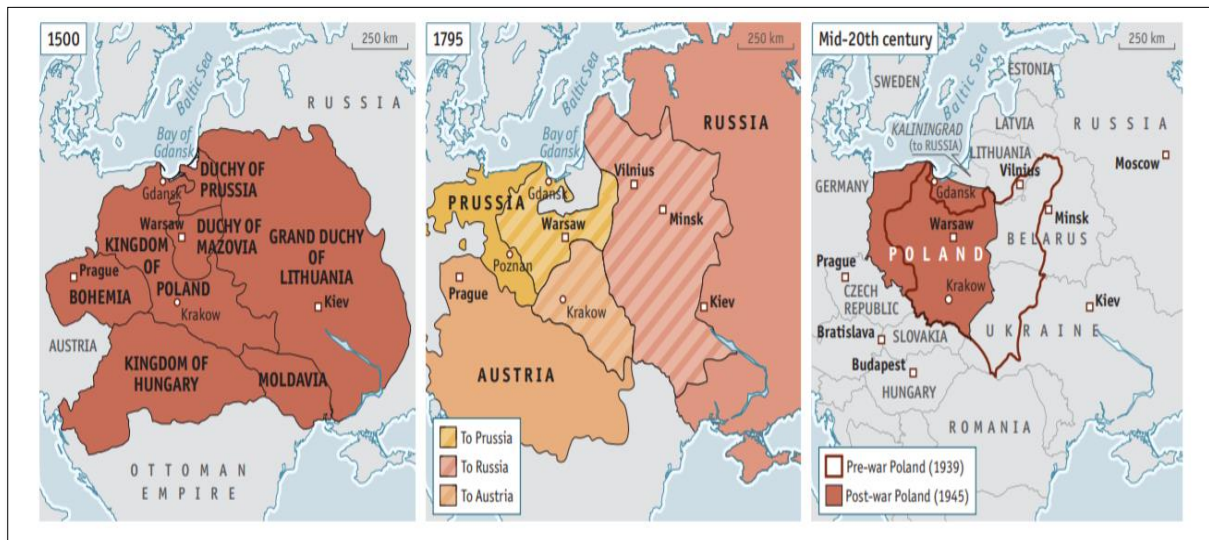


Figure 19 Map of Europe during the partitions of Poland. Source: The Economist, 2014

The attempts to preserve the national sovereignty have been at the heart of the independence fights since the XVIIIth century and before, for example through the establishment of the Congress Kingdom of Poland, which existed for about 15 years (1815-1831) due to the inexistence of the “national state” (Zamoyski, 2006). Despite the self-directing freedom, the Congress Kingdom was under the rule of the Tsar of Russia who was at the same time the king of Poland and therefore was subjected to the process of Russification. Furthermore, the safeguard of the Polish identity translated into the perseverance of the Polish universities that functioned in Warsaw, Wilno and Krakow in the middle of the XVIIIth century. Gross (1979), the Polish-American sociologist, argued that:

*“Freedom and liberty have their roots in the Polish tradition that reaches back to the sixteenth century, and the so-called “golden freedom”. The golden freedom was conceived of a symbol for the special quality embodied in the Polish state, indeed, as the highest value that can be achieved in the life of a society, more important even than political stability and economic prosperity. This value could not be compromised or traded for any other”*

(Gross, 1979, p.6)

Another example of the struggle with occupiers was World War I, as the three empires Germany, Hungary and Russia occupied Poland until the disarmament of the German troops on 11 November 1918. After 123 years of non-existence, the Polish state regained its national independence. The Polish troops were ruled by the commander in chief Jozef Pilsudski who is a national legend or even “man of Providence” (Zamoyski, 2006). Most importantly, in the aftermath of World War I, the ethnic make-up of the population changed significantly, as for example in 1921, Polish society was diverse in terms of religion (2.2 million Jews) and nationality (4 million Ukrainians).

During the times of wars, Poles present in Poland were considered “minorities” in their own country, where they experienced violent discrimination (Mayblin & Piekut, 2016) from the foreign occupants. This historical construction of Poles discrimination translated in various forms of oppression such as: exclusion from social life and national education, prohibition of the use of the Polish language in public institutions or the deprivation of the basic resources to live. This has obviously resulted in different forms of Polish resistance and the creation of the government on exile, which has fought for the freedom of Poland.

Between 1939 and 1945, the population on the Polish territory has experienced terror and was forced into obedience by the “Nazi” German troops. People of all ethnicities, nationalities and religions were either captured or exterminated in the concentration camps or deported to Germany or Siberia and Soviet Central Asia. During the occupation, all the Polish administrative and cultural institutions ceased to exist or were shut down. Yet, the Polish people did not all obey the Nazi occupiers, and resistant activities were gradually established. The human genocide of WWII has led to the “ethnic cleansing” (Zamoyski, 2006) in Poland and is probably one of the most traumatic memories of Polish history and of the world, which enhanced the Polish spirit of resistance and solidarity (Globokar, 1989).

It can be argued that the homogeneity on the ground of ethnicity and nationality is mostly a result of WWII. From the demographic standpoint, after years of devastation, the “New Poland was 20 percent smaller” (Zamoyski, 2006) and counted less than 24 million people in 1946, as compared to 38 million today (Kaczmarczyk and Okolski, 2008). Although Poland was freed from the German occupation, soon after the end of the WWII, “The New Poland” was

dependent from the enemy forces again. This time the Soviet military introduced censorship in public life and political control.

### The Communist Era and The Catholic Religion

After 1989, Poland underwent a significant political, demographic and economic transformation, which has changed the functioning of companies (Skuza et al. 2013). Despite the managerial innovations, Poland suffered from high unemployment, recession, inflation and particularly rapid privatization processes. In the '90s massive workforce reduction took place in most state-owned companies, including production workers in firm A.

Polish firms under communism were controlled by the Party, who made the decisions concerning promotions and the selection of candidates. Changing this tradition might still be quite a challenge in some State-Owned companies that are slightly integrated with the conservatist Party PIS. Many researchers (Skuza et al. 2013; Obloj & Weinstein, 2002) highlight that the communist heritage is an important source of information to understand the establishment of new organizational HRM practices which emerged in the post-socialist Poland.

The alleviation of the negative effects of the centrally governed economy took place in the aftermath of the massive privatizations of Polish businesses, the so-called “shock therapy” (Obloj & Weinstein, 2002). The shift towards international competition and free market had important implications on knowledge transfer and recognition of employment rights and programs. Most importantly, the authors (Weinstein & Obloj, 2002) argue that the national economic bodies had an important impact on development of HRM in firms, for instance through the rise in the Western education and mezo influences.

The process of transformation in public companies followed a different path than in private ones. The differences between state-owned companies and private companies at the mezo level, as well as the characteristics of management, were visible in the socialist Poland and persist even today. The following figure highlights some of the main differences between the management styles in public versus private companies, for example familiarity with foreign



languages, future-focused strategic management, age of employees and the attitudes of openness among management staff (Shama, 1993).

| Managers of private companies                | Managers of State-owned companies                 |
|----------------------------------------------|---------------------------------------------------|
| Younger                                      | Older                                             |
| Professional                                 | Nomenklatura                                      |
| Pro-change, hopeful for future               | Anti-change, look for past                        |
| Sales background                             | Engineering background                            |
| Active, fast to act                          | Passive, slow to act                              |
| Flexible, open-minded                        | Rigid, closed-minded                              |
| Problem solvers                              | Stick to plan                                     |
| Order-givers                                 | Order takers                                      |
| Businessman                                  | Party man                                         |
| Entrepreneurial, risk takers                 | Conservative, risk-averse                         |
| Strategic, externally oriented               | Operations focused, inside-people                 |
| Market oriented                              | Plan oriented                                     |
| Consumer oriented                            | Production oriented                               |
| Rely on market signals                       | Rely on personal contacts                         |
| Price according to market demand             | Price according to cost                           |
| Use promotional tools                        | No use for promotion                              |
| Use more efficient distribution              | Distribution in state-dictated                    |
| Pay for performance                          | Pay for grade                                     |
| Speak languages of markets (English, German) | Speak language of past markets (Eastern European) |

*Figure 20 Characteristics of management in Privately-Owned and State-Owned companies. Source: Shama (1993)*

The communist era in Poland (from 1947-1989) was marked by dramatic fights for human rights and by the influential role of the Catholic church culminating with the election of the Polish Pope John Paul the Second. John Paul II boosted the Polish faith in the future of the country and instilled the courage for change of the status quo of social inequality. In 1980, in the aftermath of the strikes in the Polish businesses after the communist government was considered to be responsible for the deterioration of the economic situation in Poland and growing debt as well as the precarious conditions of the working class, the Pope encouraged the strikers to fight for freedom of expression and independent trade unions.

The Polish resistance has led to the establishment of Solidarnosc (Solidarity), an independent trade union which was the milestone of the democratization of Poland and advocated for the human rights of the Poles. Poland was not initially a democratic society founded on equal rights as other western countries (Chanlat, 2017). During the transition time, the Polish shipyards and power plants were preoccupied with the social rights and the oversupply of Polish workers. During socialism the level of employee mobility (Robinson and Tomczak-Stepien, 2008) was the lowest in the contemporary history of Poland. Under the social policy of the centrally

planned government, Polish firms were indeed focused on the so-called “survival patterns” and operational excellence, especially in the primary sector.

Most importantly, the communist government strived to preserve the homogenous country and considered its role in the construction of the nation-state. Considering that in Poland most of the population is white from Polish origins or with dual citizenships (Poles who repatriated to Poland), the cultural dimension cannot be separated from the religious dimension.

White et al. (2018) argued that an important cultural factor of the national identity is respect for the church and John Paul the Second. Mayblin & Piekut (2016) argue that the perceptions of Catholic Poland leading other countries towards the Christianisation has been a national myth for centuries. Lodzinski (2012) argues that the national Catholic faith was an important factor of the national hope in the reconstruction of the state and its identity.

*“The concept of the state including citizens of different nationalities was rejected, and the principle of a nation-state identifying citizenship with nationality, was approved. A new period saw, therefore, a re-definition of the Polish nation and the criteria of belonging to it”. (Lodzinski, 2012)*

#### Poland after EU integration

After the European integration of Poland, the participation of Poland in the international market was based on the so-called “four freedoms” (European Commission report on Poland, 2000) which can reflect the openness of the national borders (adoption of the Schengen area), the openness of capital flow (privatizations and foreign direct investments in Poland), openness toward people (immigration and emigration) as well as openness of goods and services.

The contemporary history of Poland, after 2004, was coupled with the remarkable democratic transition from the controlled, state-owned market to a free market leveraging its position in the international arena. The values of democracy, liberal values, and openness (Lodzinski, 2015) started to be recognized and gain in importance. The development of a free market carried an easement of foreign travel and the internationalization of Polish businesses with it

due to the influx of foreign-capital organizations. New opportunities for international mobility applied to the educational system (influx of foreign students to the Polish universities) and in the area of employment considering the emergence of the western practices like job training and career development opportunities (Domanski, 1991). The empirical data from the study (Robinson and Tomczak-Stepien, 2008), suggests that in the “New Poland” (Zamoyski, 2006), Polish employees have more positive attitudes towards foreign trips within the professional environments.

A greater position of Poland seen as an international trade partner and a free country instilled the attitudes of enthusiasm (the Economist, 2014) especially among the young generation (people born after 1980). The accession to the EU fostered the Polish “cultural modernization” project (Obloj & Thomas, 1996) mainly due to the adoption of the European legislation and the greater openness of the national borders, which provided the opportunity to travel and learn from the western models of organization within multinationals. The new generations of Poles are in a better position to benefit from the open borders and international openness than the older generations of their parents who *“had little or no contact with the outside world”*. The Guardian in 2014 published:

*“It is not just Poland's economy that has changed; it's the country's citizens as well. Young Poles today travel and study all over Europe, taking part in exchange programs or just simply packing up their bags and heading for the nearest airport. Many have now personally interacted with folk from different countries and races or know people from their families who have. This was not always the case.”*

#### Why international openness?

Some may still have an image of Poland as an under-developed country with under-urbanized cities and families living in small cities and villages (White et al. 2018) where nobody speaks English and the youth made a choice either to work or to complete their studies in Poland.

However, after the ascension of Poland to the EU in 2004, the international openness together with Pole's migrations has contributed to overpassing the image of "homo sovieticus", which did not fit anymore in the new generation's neo-liberal life philosophy. Bobkowski (1989) a Polish writer in exile, essayist and economist established a myth of "Cosmo-Pole" in his book 'The Biography of the Great Cosmopole'. According to Prof. Nowak, the myth of "Cosmo-Pole" is an essential component of the "Polishness" (Ładykowski, 2015) allowing to extract a more positive way of seeing the Polishness which should not be a historical burden or a limit. It is possible to settle abroad without losing the qualities of being a "Pole". Indeed, one of the interviews of Polish origins in a report by White et al. (2018) argued that:

*"Poland is a more open country since communism ended. Some Poles began going abroad and saw how people lived... and Poles who came back to Poland passed that on. That's probably how change takes place here" (2018).*

Poland took benefit of greater international openness, mainly after the accession to the EU which allowed for the opening of Polish borders, people's free movements within the EU for business and study purposes. Yet international openness is important for Poland because it also instils a cultural dimension. For instance, thanks to the migrations, Poland benefits from *"openness to the world, integration with the world, no cultural barriers, mutual understanding, erosion of stereotypes, feeling of community with Europe* (White et al. 2018).

Nowicki (2000) explains that the limits of openness are not only geographical but mobilize the concept of imaginary borders. The author (2000) draws on a definition of openness provided by a Polish philosopher Piotr Skarga, according to whom *"openness to the others is often linked to openness to what is new, to theories, to an unceasing dialogue with those who think otherwise, which generates the passion for debate. But questioning long-lasting and ingrained beliefs is not easy"* (Nowicki, 2000).

In order to understand the context of international openness in Poland, it is important to outline the recent demographic challenges in Poland and its implications for the labour market and organizational strategies. This brings us to the next section.

### 3.5. Country of immigration and emigration

#### Lessons from history about the ethnical homogeneity

Several Polish historians and researchers in migration studies (Narkowicz, 2018; Zamoyski, 2006) point out the ethnically heterogeneous past of the country. Back to the 14<sup>th</sup> Century, Poland was a diverse country in terms of ethnicity but also in terms of religion, with many people belonging to Judaism, Protestantism, and Islam. In 1931 Polish people were estimated to represent only 65% of the 31 million living in Poland (Kupczyk, 2014). It was suggested that:

*“In pre-war Poland, over 30% of the population was comprised of ethnic minorities with significant numbers of Jews, Ukrainians, Armenians and Germans inhabiting what was then the Polish-Lithuanian Commonwealth<sup>18</sup> and one of the most diverse countries in Europe”*

(Narkowicz, 2018)

Ethnical homogeneity in Poland was determined by several factors, one of them being the post-war population movements. Lodzinski (2012) studied the ethical structure between 1945 and 1989, as two fundamental periods in history which marked the creation of the “Polish nation-state” as it is known today. It was not until the fifties when the government started to recognize the ethnic distinctiveness of minorities as a part of the Polish community and introduced the law of equal rights and ethnic-non-discrimination in 1952, with emphasis on the universal term of nationality, which replaced the concept of national minorities.

The first observation which is largely assumed by Polish scholars refers to the demographic changes after WWII, including the Nazi extermination of the Jews, Gypsy/Roma between 1939-1945 and the first dispatch of the Ukrainians to the Soviet Union four years later while repatriating almost 4,5 million Poles from the USSR (The Union of Soviet Socialist Republics). After the War, Poland became an ethnically homogeneous country, except for a few ethnic minorities which were sent to different regions in Poland (e.g. the German minority present in the Lower Silesia).

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<sup>18</sup> The Kingdom of Poland and the Great Duchy of Latvia established a single state under the name of the Polish-Lithuanian Commonwealth (1569-1795) characterized by a diversity of ethnicities and religions.

A second phase of “de-ethnicization” in Poland started in the sixties and was marked by the structural changes within Europe. Special attention was paid to the Ukrainian community which had remained in the Polish territory since 1945. Scholars explained (Iglicka, 2001; Lodzinski 2015) that the unenthusiastic attitude of Poles towards Ukrainians at the time could be caused by the historical memories of violence related to the massacres in Volhynia and Eastern Galicia led by Ukrainian nationalists between 1943 and 1947. Despite the bloody historical conflicts, similar history and later inter-country movements of Ukrainians in Northern Poland led to a “weakening” of their Ukrainian identity which triggered a somewhat better assimilation of the Ukrainian community in Polish society.

Currently, the Ukrainian community in Poland is an ethnic minority and is blended with the Polish community. Back in the XVIth century, many Ukrainians claimed their affiliation with the ethnic minorities called “Lemko”, claiming their national identity and language which resembled the Polish language and traditions (Oleksiak, 2015).

The third fundamental phase of the re-definition of the Polish identity refers to the contemporary history of Poland (PRL- the Polish Public Republic) between 1952 and 1990. The Polish authorities attempted to restore the national identity and used the following catchword from the '40s: that Poland should be “clean as a glass of water” (Lodzinski, 2012), attempting to create the illusion of an ethnically homogeneous Polish society.

According to Lodzinski (2012):

*“The political exclusion of ethnic minorities spawned a phenomenon of ‘hidden ethnic pluralism’, which operated in the people’s consciousness without any support from public institutions” (Lodzinski, 2012).*

#### Current migration issues

Migration in Europe nowadays underpins the national policies in the area of diversity and equality. Drawing on public figures and studies, Poland is seen as a country of both emigration and immigration, which has important implications for the situation on the domestic labour market. Analysis on its migration profile forecast that in 2060 Poland may actually become a

country of immigration like other western counterparts (White et al. 2018). Consequently, Poland may recognize the priority of addressing diversity management issues.

However, several scholars in political science argue that Poland has been a country of emigration rather than a country of immigration except for the period before the wars. Lodzinski argues that in the '70s and '80s, the number of immigrants was less than 2,000 per year. He argues that *“one of the differences with Western countries is that during the 60's the ethnic structure of the country started to change significantly”*. Although many scholars suggest that the country became a territory of emigration, the immigrant population went up by 300% in ten years (Duszczyk and Matuszczyk, 2018) and yet only little attention has been paid to the integration policies of immigrants. Despite the people movements and open borders after the end of communism and the accession to the EU, the inflow of immigrants is relatively low in a country of 38,5 million of Poles (Kaczmarczyk, 2018).

#### Poland – country of immigration?

It is important to note that a rapid rise in European immigration was observed after Poland joined the EU in 2004. The national statistics office in Poland (Gus, 2017)<sup>19</sup> revealed the immigration figures for the years between 1973 and 2014. According to their data, more than three hundred thousand immigrants were registered, almost two thirds from Europe, the rest from North and South America, Asia, Africa, and Oceania. The immigrants were expected to be Russian, Canadian, British, Irish, German and American (the nations are mentioned randomly). By 2017 the number of applications for a temporary or permanent residence permit requested by immigrants from Eastern Europe, mainly from Ukraine, increased by 40 % compared to 2015 (Gus, 2017). Yet, the Ukrainians can work in Poland without major restrictions only temporarily and are viewed as “work guests” rather than long-term immigrants whose presence could change the demographic profile of Poland.

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<sup>19</sup> These statistics issued by the national institution GUS may not be accurate as they are based on the number of applications for a residence permit and do not consider an important influx of immigrants who do not need to apply for a residence permit.

Indeed, the measurement of the immigrant population from Ukraine has been particularly problematic, because the number of applications for residence or work permit does not reflect the real number of Ukrainians whose number is on the rise. Furthermore, many Ukrainians may find themselves working in the black market, hoping for unreported employment in a short-term perspective that will allow them to earn salaries between two and three hundred euros per month.

The following chart presents the ethnocultural representation of Polish society as well as the influx of immigrants in Poland in 2017. In the chart, nationals account for immigrants with EU citizenship. Poland is in second place among the countries where most immigrants come from Europe. Yet, the same report of Eurostat (2017) suggests that the number of emigrants outnumbered the influx of immigrants in Poland and the non-nationals represent less than 1% of the overall population. Other sources (Stefanska, 2015) state that foreigners constitute 0.5% of Poland's population.

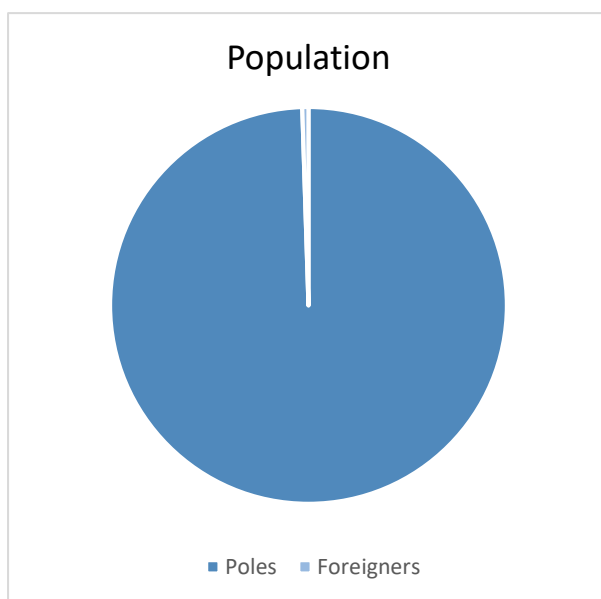


Figure 22 Immigrants in Poland, Adopted from Eurostat, 2017

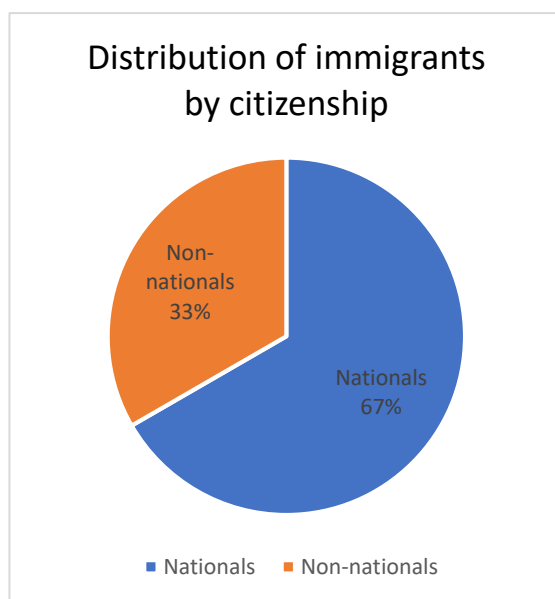
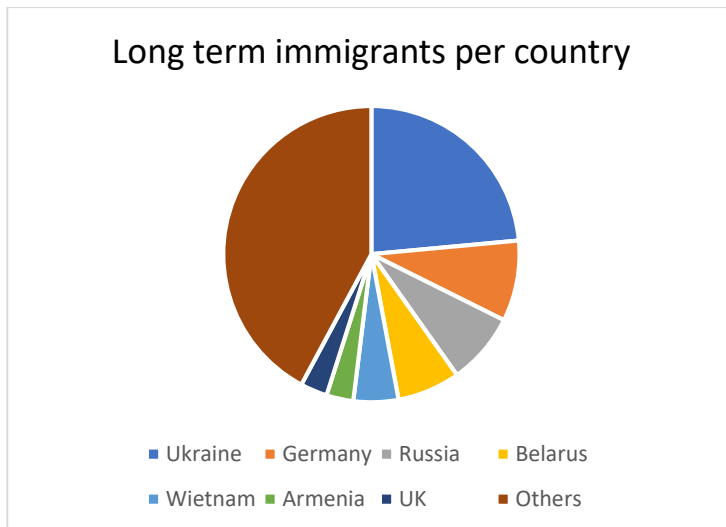


Figure 21 Ethno-cultural picture of Poland, 2017. Adopted from Eurostat, 2017





*Figure 23 Immigrants per country, Source: Eurostat, 2017*

The national migration policy ignores to a great extent the integration of immigrants in Poland. The lack of evidence of the pro-ethnic diversity policies suggests that the Polish authorities are against such a policy and prefer to focus on homogenizing Polish society. The European treaties such as the Schengen Treaty, which is one of the rare means that helps to regulate the stay of immigrants in Poland, are used by the Polish authorities as a means to foster the temporary stays and short-term work contracts (for example seasonal jobs) for instance for Belarusian and Ukrainian workers in order to fill a skills gap (Stefanska, 2015). Yet, the social integration of these ethnically different groups is completely ignored because their linguistic and cultural assimilation is widely assumed to be smooth and unproblematic, also because of the temporary stay of these groups.

According to the work service report (2018), the main sectors which employ immigrants in Poland are: agriculture, manufacturing, construction, trade, and market services (from the sector where the number of immigrants is the highest). Based on data on the work permits for foreigners, the most popular occupations by immigrants in 2016 and 2017 are: plasterer, bricklayer, construction worker, drivers, home services and operator of machines for processing meat, but also other such as cleaning service or agriculture.

## The exodus of Poles to the West

The international migration studies are predominantly concerned with the typical immigration countries like the US, the UK or France, in which the outcomes of immigration can be counted in millions of Poles. Despite the “return” migration policies, Poland has been considered as a country of exodus since 2004 and at the same time a country highly exposed to future immigration. Although Poland has received immigrants and refugees (for example from Chechnia in the '90s and also before and during the transition period (Gorny et Pudzianowska, 2010), the influx of immigrants has accelerated only recently, since 2015, after the openness of the national borders and the liberalization of the labour market.

The emigration from Poland is mostly labour migration. The first stage of the Poles' emigration to western countries started in May 2004, and in a period of one year, more than one hundred thousand Poles left the country to the UK where they filled the shortage of skills of medical staff, plumbers, electricians, builders and so on (Zamoyski, 2006). For instance, in 2011, Poles who emigrated to the UK were mostly employed in large economic sectors such as: distribution services, hospitality, manufacturing, other business services, administration and support services, health, education followed by transportation and agriculture (Okolski and Salt, 2014). However, the migrations of Poles do not concern only low-skilled workers who fill the gap of skills elsewhere, but also highly educated Poles with university diplomas who were overrepresented in the early 2000s (Kaczmarczyk and Okolski, 2008). One of the peculiarities of the Poles abroad is that many of them were overeducated for the roles available in the West, which were far below their qualifications.

Why have so many Poles emigrated? The massive outflow of Poles was strengthened by high unemployment of about 20% between 2002-2004 and the oversupply of the economically active workforce (Kaczmarczyk, 2018). Poles were also attracted by the opportunities offered by foreign lands, as much as Poland has been viewed as an opportunity land for many immigrants in recent years. The United Kingdom and Ireland, as well as Norway, are considered the most popular destinations in the post-accession period, due to the good knowledge of English by the young generation and possible effects of chain immigration or the so-called family reunification abroad which have contributed to the establishment of Polish diaspora and of whole communities. For example, in the US, the Polish community accounts for almost 2

million Poles and recently the list of the popular destinations for Poles has been extended to Netherlands, Germany, Sweden and Canada (Work service report, 2018). As a result of Brexit, UK became a less popular destination for emigration.

Considering the age average, mostly young people (the group between 18-24 years old, as well as the group between 25-34 years old) declare to be willing to migrate, but the interest to migrate is also identified among other working groups. It is interesting to make a distinction between economically active young generations and people in post-working age, because these groups may reflect different tendencies and indeed to “different Polands” (Zamoyski, 2006).

The following figure shows the relationship between the occupations of immigrants in Poland and the posts occupied by Poles on emigration. The shortage of skills in Poland poses questions about the overall picture of the labour market and the firms’ struggles to find talents.

| Employment of immigrants in Poland by sector                                                                                                                                                                                                                                                                                                                 | Employment of Polish emigrants outside Poland by sector                                                                                                                                                                                                                                        | Need for labour supply per sector/posts                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Manufacturing</li> <li>• Construction</li> <li>• Trade and repair</li> <li>• Transportation</li> <li>• Catering and hospitality</li> <li>• Finance and insurance</li> <li>• Scientific professional and technical activities</li> <li>• Public administration and support services</li> <li>• Healthcare</li> </ul> | <ul style="list-style-type: none"> <li>• Agriculture</li> <li>• Manufacturing</li> <li>• Construction</li> <li>• Trade and Repair</li> <li>• Catering and hospitality</li> <li>• Transportation</li> <li>• Financial and insurance services</li> <li>• IT</li> <li>• Other services</li> </ul> | <ul style="list-style-type: none"> <li>• Finance services</li> <li>• Biopharmaceutical</li> <li>• New technologies</li> <li>• IT</li> </ul> |

*Figure 24 Employment of immigrants. Source: Adapted from the national statistics, Gus (2017), Report work service (2018)*

Nowadays, the interlink between the trends of migrants’ inflow and outflow is the key indicator of the situation on the domestic labour market. One could assume that the outflow of Poles has created a gap in the Polish labour market, leaving a possibility for organizations to employ or at least attract foreign workers, but apparently, this is not the case. Scholars confirm that one of the threats for Poles is that immigrants could take up their jobs (White et al. 2018). This has important implications on the perceptions of DM, as the diversity of nationalities on the labour market is rather seen as a temporary solution for the organizations.

Also, the indicator of the relationship between demand and supply on the national labour market in Poland is the job vacancy rate, which indicates the proportion of the unfilled available posts. In 2018, Poland's job vacancy rate was evaluated as one of the lowest in the past 5 years and was 0.96% in 2017 (Gus, 2018). Also, the unemployment rate in Poland was as low as 4,5%<sup>[5]</sup> in 2017 and is considered to be one of the lowest in the past decade within the European region.

Considering the type of positions occupied by the immigrants and the positions occupied by Poles on emigration, it can be argued that the immigrants could fill the gap of skills on the domestic market when it comes to both the unqualified and qualified workforce.

Also, according to recent national statistics (GUS, 2018), in 2018 there were around 149,000 available jobs in Poland in the sectors where the number of immigrants is on the rise: manufacturing, construction, commerce and car repair, transport, gastronomy and hospitality, information, finance, scientific activity and engineering, public administration and healthcare. Newly created positions are: specialists (experts), trade workers, services and sales workers, plant machine operators and assemblers, technicians and basic occupations (Antczak et al. 2017 p.114). There is an important national demand for candidates' profiles in the above-mentioned jobs which are also the main occupations in the case studies of the present thesis. For instance, firm A employs mostly administrative workers and plant machine operators. Firm B and C employ trade and sales workers, and the recruitment in the sales department was identified in the firm B as the critical area. Finally, firm D (innovation company) strived to find candidates who specialised in the biopharmaceutical domain.

According to the report by Work Service (2018) almost 33% of the firms that are looking for candidates declare that the shortage of skills in Poland is the reason for the high number of untapped posts. In light of the current ongoing democratic crisis, it seems that the national political context is not favourable to using national pro-diversity and integration policies to attract international workforce.

### 3.6. DM in the context of rising nationalism: 2015-2019

*"We want to protect Polishness, our values, traditions and history".*

*J.Kaczynski, 2018 (pis.pl)*

In the previous chapter, it was shown that the "feeling of belongingness" to the Polish nation comes from a common identity among Poles who share the same history and therefore stray from conversations about the "other". The safeguard of the historical concept of Polish identity has been transformed into forms of nationalism and political patriotism.

The first major victory of PIS (Law and Justice), a right-wing party, dates back to 2005 with the result in the parliamentary elections (Zamoyski, 2006). The second victory in 2015 (the year when the current thesis research began) was also marked by the abolishment of the Government Plenipotentiary for Equal Treatment. In 2016 the Council for the Prevention of Racial Discrimination, Xenophobia and related Intolerance was abolished and replaced with the National Institute of Freedom - Centre for the Development of Society.

Considering the time of the empirical investigation which was between 2015 and 2019, it seems important to present the general picture of the socio-political situation in Poland to enhance an understanding of the (unfavourable) context in which DM emerged and was analysed. This section draws on the grey literature, public and governmental reports as well as a few studies conducted by Polish scholars.

Back in 2015, the leader of the party (PiS) Jaroslaw Kaczynski issued the following statement which highlights the anti-immigration position of the government supported by the rhetoric of national security and the threat for Polish customs, traditions and national identity (Narkowicz, 2018):

*"Does the government have the right, due to the foreign and external pressure and despite the disagreement of the nation, to take decisions that will probably have negative implications on our life, our public life, our public space, our real freedom and finally our safety (...). It is not about a decision to accept a certain amount of outlanders, what the type of foreigners, it's about the serious danger of activating the process, allowing for a rapid increase in number of*

*immigrants, the lack of respect for our right and our traditions and the imposition of their requirements in a public space and other spheres of life in the aggressive way (...) Poles do not want that".*

(Statement of Jaroslaw Kaczynski, Leader of the Law and Justice party, Youtube, 2015).

For example, massive demonstrations have gathered thousands of Poles on the streets around the country during national Independence Day. The Polish nationalist aggressive marches, although rejected by the international media all over the world, served as a form of "resistance" towards the influx of immigration, emphasizing the belonging to the Polish nation and nationalists' slogans such as "Poland for Poles", "Poland is a strong, proud nation" as well as anti-Semitic slogans (BBC, 2018). In the same time period, the rise in nationalist attitudes occurred in other countries as well, but what is interesting is that nationalist agendas are built in each society on different historical contexts.

PIS often referred to the importance of *"the Christian values based on which is built the Polish and European culture"* (Pis program, 2014). The current political division of Polish society, between two opposite perceptions: Polishness and Europeaness, is rooted in the presence of two historical visions of Poland: Poland under the Piast dynasty and Poland of the Jagiellonian.

Current political nationalist aspirations, the cultural unification of Polish society and associated issues of the national identity have been marked by the events in Polish history dating back to the times before WWII. Two opposite visions prevail in the collective memory: a vision of Poland of the Jagiellonian dynasty (1386–1572) during the Second Polish Republic and a vision of Polish lands during the dynasty of Piasts (960-1370) (Nowicki, 2010). Scholars argue that the image of a geographically, politically and linguistically united nation in the image of the Piast dynasty was indeed desired by the national authorities especially after WWII.<sup>20</sup> It is interesting to mention that the first ruling dynasty was meticulously described in the Chronicles at the turn of the XIth and XIIth century, by Gallus Anonymus (Pol. Gall Anonim) considered to be the first historian of Poland. This work informs us about the times of Polish nobleness, capable of combatting foreign enemies and barbarian tribes and most importantly to build the first traces

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<sup>20</sup> Memorandum of Temporary Government of National Unity in 1945. The Temporary Government of National unity was established in a form of a coalition between the Communist government and the Polish government in exile (Polish dictionary, Sjp, 2019).

of the “Polishness” through the election the first undocumented “ideal” ruler of the Piast dynasty, considered to be “purely Polish” (Mencwel, 2002, p.134). Afterward, the Piast foundations contributed to the vision of the “The nation-state” which covers the hidden mechanisms and structures of “naturally established borders”, “pure blood and common origins” and “religious and ethnic unification” for the benefit of the Poles.

This vision of a “Polish”, nationalist “Nation-State” has been constructed and reconstructed in the course of history, from post-war reality, communism, until today. Consequently, the “biological” conception of nationality disseminated in certain western states such as the US, does not fit with the imaginary vision of who is Polish and who is not, or the “Catholic Polish” and the image of “True Polish” (Mencwel, 2002).

The Jagiellonian tradition has its roots back in the history of Poland of three nations in the XVIth century: Poland-Lithuania, Bohemia and Hungary, that became a multi-ethnic, multicultural, authentic, sovereign and politically uniform power, which stand together to defend the common enemies. Mencwel (2002) highlights Poland as a “*hybrid civilisation (...) impregnated with humanism, republicanism and tolerance*”, but illustrates the multicultural character of multistate reality in terms of cultural separated ghettos (nobility, bourgeoisie, peasantry) and nationalities (Polish, Germans, Jews, Lithuanians or Ukrainians) (Mencwel, 2002, p.131). The author highlights that in the past, the Jagiellonian tradition contributed to the reinvention of the relations between the Eastern neighbours and transformed these relations into political cooperation.

Today, Poland is a country of emigration and increasing immigration (Gus, 2018) facing significant challenges of skill shortage, but it might be difficult to explicitly recognize the discrimination risk of other populations. Considering discriminative and xenophobic behaviour in society, it is complicated to provide unequivocal findings, because there is a lack of statistics based on several judicial cases and the available numbers are conflicting. A report of the Human Rights Ombudsman based on the Eurobarometer for 2012 and 2015, argues that the Poles believe there is increasing discrimination in society and specifically on the ground of origins (plus 9% as compared to the previous year). The barometer suggests that the awareness

in the area of discrimination is insufficient and Polish employees are often not aware of their rights in case of discrimination, bullying or harassment in the workplace (2018).<sup>21</sup>

The Polish labour code defines direct and indirect discrimination as well as the principle of equal treatment in the workplace, which provides large and unprecise definitions of what unequal treatment means. According to NGOs, there is no legal obligation aiming to prevent discrimination in the system of employment. Employees who have experienced discrimination at the workplace have a list of choices: report the case to the Ethic Correspondent, if such exists in the company, report the case to the national labour inspection, report the case directly to Court or to consult the anti-discrimination bodies such as The Ombudsman in Poland or the Helvetic Foundation for human Rights (Strzelczak, 2017).

#### The national anti-discrimination legislation in Poland

Poland has adopted the anti-discrimination law (Krasnowolski, 2011) in the Criminal code and the Labour code (art. 11). The labour code indicates the following: *“Any discrimination in employment, direct or indirect, in particular due to sex, age, disability, race, religion, nationality, political beliefs, trade union membership, ethnicity origin, religion, sexual orientation, as well as employment on time definite or indefinite, either full time or part time is unlawful”*.

The labour code states the following: *“Employees should be treated equally in terms of reference and termination of employment, employment conditions, promotion and access to training to improve professional qualifications, in particular without being treated based on gender, age, disability, race, religion, nationality, political beliefs, trade union membership, ethnicity, religion, sexual orientation, and regardless of fixed or indefinite employment either full time or part time” (Art, 18, II).*

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<sup>21</sup> These figures should be considered with caution, as they might lead to the stereotypes of Polish non-acceptance of other ethnicities, religions and nationalities which is a false assumption in the larger national perspective and could lead to an unwanted generalization of the Polish nation.



### Implications for international recruitment strategies

Since 2018, the Polish media has diffused the information that the right-wing party has started to welcome immigrants from Eastern Europe to fill the gap in the workforce but does it in a hidden way, as it is inconsistent with the political promises. The Minister of Interior and Administration of Poland, Mariusz Blaszczak, stated in an interview from 2017: *"We will not accept even a single refugee"*. In 2018, the Minister of Infrastructure and Development stated the following: *"From the point of view of the economic and demographic situation, we are sentenced to accept migrants. It happened faster than we all thought; a few years ago, we thought about it as a long-term solution"* (Ministry of Family, Labour and Social Policy, 2019).

The national context does not facilitate the employment of foreigners. Last year, the Polish government updated the work permits for foreigners, shortening the duration of work permit to 6 months for most nationalities, except the groups that can apply for the "Polish Charter". Also, the administrative procedures of applying for a work permit are longer than a few years ago and can take up to 90 days for the members of the EU and more for candidates from outside the EU. Apparently, the trade unions are against bringing talents, especially from the CEE region, due to the risks of the lack of jobs for nationals and the risk of lowering the work standards because of a general assumption that workers from Eastern European neighbour countries are likely to accept worse work conditions.

Polish media (Bartus, 2018) claim there is a new direction for the national migration policy aiming to facilitate the obtention of work permits, stay permits and extend their duration, especially for immigrants from Eastern neighbour countries. But the Polish government has not confirmed this statement. A project of controlled immigration would let foreign workers enter the national labour market, but specifically for the low-paid jobs. International media speculate that "Poland Bashes Immigrants, but Quietly Takes Christian Ones" (Sanotra, 2019), a scenario which seems to reflect the political program of PIS from 2014 stating the following:

*"We treat belonging to the Polish nation as a value not only because it was given to us by birth and cultural heritage, but also because it results from our tradition. It involves an inextricable*

*link with Christianity and at the same time an extremely strong attachment to freedom and equality” (PiS program, 2014).*

What are the implications for the national labour market and labour supply in Poland, and resulting strategies of talent attraction in organizations? The national statistics confirm the “mismatch” between the labour supply and available jobs, as well as the tendency of an aging population, but also show the evidence that the mobile workgroups (people between 18-44 years) outnumber the passive groups (non-mobile groups as well as the post-working age groups).

Various articles and reports suggest that the attraction strategies focus mostly on the neutral HRM practices such as: money motivation, innovative open spaces with a gym, employee benefit cards or a car. Although many sources argue that firms deploy new programs more and more to attract various workers, there is little evidence of what these programs and their outcomes are, specifically regarding the number of new hires of different nationalities. Some firms attempt to attract an international workforce by providing Polish language courses.

Recruitment websites of multinational firms in Poland provide a few examples of management practices aiming to fill the skills gap in the companies integrating the dimension of “diversity” through the attraction of workers from the eastern border, mainly from Ukraine. The search for talents translates into job descriptions written in English on the companies’ websites, trainings for newcomers in terms of the Polish language, the creation of a work environment based on trust, cooperation and openness, flexible work conditions allowing foreign workers to celebrate their holidays other than Polish ones, personal career development programs, signatory of the Diversity Charter, a policy which informs of the benefits of diversity management in the companies (Jaworska, 2016). Also, perks like fruits in the canteen, gift cards and so on, designed to attract international employees, are ethnically neutral.

In sum, the media argue that Polish firms are likely to attract workers from Ukraine for low-skilled jobs and use specific techniques that are rather focused on the integration within the Polish society rather than aiming to bring more foreigners from different countries in organizations and create a truly multicultural environment. Organizations in public and private sectors face challenges to find skills in different areas of their activity, but at the same time, it

seems that diversity management and attraction of diverse skills are not considered to be a means to change the overall situation and attract diverse talent. One could assume that the implementation of these strategies requires to dedicate some financial resources. But at the same time, multiple sources suggest that the cost of unoccupied positions may be comparable to the cost of talent attraction beyond the national borders.

According to the 2018 results of the Global Talent Competitiveness Index (GTCI - an annual study measuring countries and major cities on their ability to attract, develop and retain talent) made by INSEAD, the Adecco Group and TATA Communications, in the ranking of 119 countries, Poland remains at the 39th position and the high-performance city is Warsaw. The study suggests that Poland has a strong legacy in growing the local workforce, but it has issues with attracting international specialists. Following a statement from Adecco's country manager: *"We are a mono-ethnic and monocultural country, although Poland has been a national and cultural melting pot for centuries. We are able, as a society, to return to these wonderful values, but it takes some time"* (Adecco, 2019).

### 3.7 Conclusion

This chapter highlighted the Polish context by looking through the lens of the national demographic, socio-political and historical contexts which underline the construction of the national identity, in particular the memory of its gains and losses. The adoption of a mainstream concept of diversity in this context seems challenging as the Polish national identity is inseparable from the religious Catholic traditions and is inscribed in an unsolved dispute over Polish patriotism and pluralism whose foundations date back to the times of Piast and Jagiellonian dynasties.

The historical contextualization of diversity cannot be fully captured without considering the fact that Poland is in a period of change and so the traditional framework of identity (Nowicki, 2000) is constantly challenged in a socio-political dispute between internationalization and national belongingness. Nowicki (2000) explains that Poland did not follow the path of secular France, nor the "Anglo-American" multicultural aspirations. Despite what is generally believed, the understanding of DM should go beyond the narrow perspective of nationalistic

ideologies and turn its attention toward the concept of “cosmopolitan Poland” (Nowicki, 2012). For this reason, the insights from this chapter should be considered with caution, as the aim of the thesis is to avoid the trap of generalization when it comes to the understanding of national contexts and cultures.

An important question is about implications for organizations. The scarcity of the Polish workforce is not considered to be a legitimate argument to promote cultural diversity in the political discourse and to attract international candidates coming from Western Europe or Eastern Europe in particular. But this can change in the coming years.

This leads to the question on whether Polish companies are keen to use DM to attract and recruit international talents or whether they use DM for different purposes, which will be addressed in the next chapter.

## 4. CHAPTER FOUR – Methodology

#### 4.1. Introduction

This chapter starts with the choices of the theoretical framework in order to legitimize the research questions. It then proceeds to describe the genesis of the research, research methods and data analysis adopted to answer the research questions.

The thesis is an explorative study of the problematic concept of DM in an under-researched national context and aims to decipher its meaning and organizational implications.

Considering there is a variety of approaches to diversity and diversity management in the abundant literature, the focus will be put on transnational and contextual approaches. At the macro-level of analysis (Özbilgin & Syed, 2009) the question will be how DM is operationalized in culturally homogeneous contexts in Eastern Europe. At the meso-level, it remains unexplained why the workplace settings seem to hold back the implementation of actual DM tools despite the recruitment needs and shortage of skills. In this research, we focus on a historically and socially constructed concept of a diversity of nationalities (Chanlat & Özbilgin, 2017).

The definition of transfer retained implicates a process of local interpretation within the given society, which may be enforced by the national culture in terms of a “shared framework of meaning” (D’Iribarne, 2009) that may be implicitly incorporated in a shared image of the national myths and a specific vocabulary (Chevrier, 2011). The cultural perspective is not seen as an additional element of the analysis, but rather as the core underlying factor for a realistic adoption of DM in Poland. Following this logic (Chevrier, 2011), the analysis of a transferability of DM should go beyond purely technical aspects of transfer.

There is strong theoretical evidence of the national context in Poland and the role the national identity plays in the neglected nature of DM on the grounds of nationality, as well as its positive development for Poles in particular. Without the insights into the Polish context through the case studies, it would be difficult if not impossible to capture a new conceptualization of diversity, because it is often underestimated in Polish DM research. Such a deep contextual approach to DM, which is in its infancy stage, can lead researchers to a false assumption that the complex nature of DM is a consequence of a historical cultural homogeneity, while ignoring its heterogeneous past. Finally, the country background appears as an integral part of the two pieces of literature and serves as an essential source of information to study DM’s roots in a new organizational and cultural context.

Based on the theoretical framework and insights from the field, we adopt two research questions: **RQ1.** To what extent may the organizational context of the Polish subsidiaries foster or impede the international transfer of DM? **RQ2.** How does the Polish national context shape the DM policies and practices?

There are three components in the methodological framework: the qualitative methodology, the constructivist philosophy (Yin, 1994) and the interpretative research paradigm (D'Iribarne, 2012). The interpretative paradigm was chosen for the study of cultural insights into the failure of diversity management in organizational settings in Poland. Before proceeding to the research design, it is essential to explain the exploratory character of the thesis, as the topic of diversity management has not been studied in the Polish subsidiaries of multinational companies adopting the qualitative methods.

This research is informed by a professional experience, an internship at the French headquarters of firm A which laid the basis for the research on diversity management in Poland. This section discusses the difficulties encountered during the process of data collection, especially the search for case studies in Poland and the unexpected change due to the sale of the Polish subsidiary to a public organization during the empirical investigation in 2017.

Afterward, the thesis employs the method of multiple case studies (Eisenhardt & Graebner, 2007) and draws on four Polish subsidiaries of multinational companies with headquarters based in France, UK/Sweden and Germany. The dominant case is a production company (firm A) which has the most relevant and voluminous data. The rich elements of evidence obtained from the fieldwork in four different organizational settings allowed to combine multiple insights into an under-explored phenomenon in Poland and to shed some light on the sectoral contextualization of DM. The final problematic of this thesis emerged after the combination and multiple comparisons of the findings from all the case studies (Chanlat, 2005).

The semi-directed interviews (Romelaer, 2015) are used and combine the exploratory as well as the complementary interviews.<sup>22</sup> The thesis draws on multiple data sources: internal data (photographs, communication campaigns, company's magazine, intranet and other internal documents), the interviews and external documents. According to the principle of triangulation, the use of multiple data sources reinforces the validity of the findings. For instance, Van Maanen (1979) argues that the study of organizations within the cultural environment requires the use of several qualitative methods which represents:

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<sup>22</sup> Two rounds of interviews were conducted in the first case study - firm A (exploratory and complementary) while other complementary interviews refer to firm B, C and D.

*“a mixture of the rational, serendipitous, and intuitive in which the personal experiences of the organizational researcher are often key events to be understood and analysed as data”.*

Finally, the chapter ends with the section on research reflexivity. It should be noted that my cultural background and linguistic skills play an important role in data interpretation allowing to gain insights into a culturally-specific phenomenon in Poland.

#### 4.2. The emergence of the fieldwork and problematic

Before proceeding to the discussion about research design, here is the context of the research problem's emergence.

Initially the thesis was supposed to be a single case study of firm A. The exploratory interviews and the investigation of the Polish documents showed that DM seemed to make little sense in the eyes of the local actors, in particular at the level of the production plant. During the second year of thesis it had become clear that the production company, with its history of public ownership, did not fully allow to grasp the local meanings of DM, because it highlights its limitations much more than the benefits of DM for Polish employees.

Considering the specificity of the production company, I started to look for other Polish subsidiaries ideally in different sectors. In the meantime, in 2016 it was announced that firm A was about to sell the Polish subsidiary to a state-owned company. Although this particular transition was very interesting from a research point of view, it also became clear that the possibility to continue the investigation and the complementary interviews and data collection were put in jeopardy. In addition, the identification of other firms seemed to be a challenging task, as firm A in Poland is an exceptional case, being a production company, which is a signatory of the Diversity Charter and has signed the global diversity policy.

In the second part of 2016, I started to search for companies in Poland, which was challenging; After dozens of e-mails sent to companies (signatory of the Diversity Charter in Poland) and calls with HR Directors, the research access was not guaranteed. After, I contacted senior executives directly on LinkedIn and asked for a possibility to have a short call. At firm B, I contacted the HR Lead directly and in firm C, I contacted the Country Director of German



nationality who transferred my demand to the HR Director. The research access in firm D was facilitated by the HR Director in firm D, who was a colleague of my interlocutor in firm C.

The following figure illustrates a document addressed to the companies which included the following points: my personal background, the purpose of the project, description of the project, needs for the project and expected results for the company.





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**PROJEKT SUPPORT THE LOCAL D&I POLICY**

Projekt badawczy jest współfinansowany przez Katedrę Management, Diversités et Cohésion Sociale na Uniwersytecie Paris Dauphine (Paris IX), pod patronatem Fundacji Uniwersytetu oraz wsparty przez grupę naukowców Gestion & Société w zakresie zarządzania międzykulturowego.

**CELE PROJEKTU**

Problem realizacji działań na rzecz wszelako rozumianej różnorodności jest wyzwaniem dla wielu międzynarodowych korporacji, od Stanów Zjednoczonych po Europę Wschodnią. Praca dotyczy adaptacji globalnych polityk zarządzania różnorodnością D&I (Diversity & Inclusion) w polskich oddziałach, które są wynikiem stworzenia wspólnych wzorców, założeń biznesowych, oraz strategii zbudowanych przez Grupę. Celem projektu badawczego jest analiza możliwości wdrożenia międzynarodowych wytycznych polityki w warunkach lokalnych, w danym kontekście społeczno-kulturowym.

**OPIS PROJEKTU**

Projekt składa się z 2 części. W pierwszej części zastanawiam się:

- Za pomocą jakich działań/narzędzi można wspierać ideę różnorodności lokalnie?
- Jak zaadresować pojęcie inkluzji by zwiększyć zaangażowanie społeczności lokalnych?

Druga część badań skupia się na zespołach wielonarodowych

- Jakże mechanizmy integracji/inkluzji można zaobserwować we współpracy w zespołach mieszanych pod względem kultur i narodowości?

Problematyka badań może być dostosowana do potrzeb Spółki. Licząc na Państwa życzliwość i współpracę, zwracam się do Państwa z prośbą o możliwość przeprowadzenia badań w firmie IBM GSDC Polska sp. z o.o. Jestem do dyspozycji, aby przekazać dodatkowe informacje uzupełniające.

**WYNIKI PROJEKTU**

Oprócz rozprawy doktorskiej, przy jednoczesnym poszanowaniu anonimowości osób oraz poufności wszelkich uzyskanych przeze mnie informacji, wyniki przekazywane Spółce mogą być w formie:

- Raport wywiadów
- Infografika
- Artykuły intranet, gazetka itp.

Doktorant może być do dyspozycji polskiej siedziby Spółki podczas badań.

**POTRZEBY PROJEKTU**

Badanie fokusowe polega na przeprowadzeniu 10 rozmów z osobami :

- Z działu HR które zajmują się realizacją działań D&I. Rozmowa trwa max. 1h
- Narodowości polskiej oraz innej niż polska, które pracują w zespołach wielonarodowych

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Figure 25 Presentation of the research project, Source: own.

### 4.3. Thesis timeline

The advancement of the thesis has been presented during the doctoral workshops at Paris Dauphine University every year, respectively in November 2016, February 2017 and September 2018. The pre-defence took place in November 2018 at Paris Dauphine University. Also, in May 2017 I participated in the doctoral workshop during the conference of Atlas-Afmi related to the challenges of international integration, where I received a distinction for the second-best research project. In addition, I presented the PhD research advancements during the annual committees of the Diversity Management and Social Cohesion Chair associated with the Paris-Dauphine Foundation.

In 2017, I presented a communication during the International Joint Conference: Central and Eastern Europe in the Changing Business Environment in Prague, drawing on the first insights from the empirical study in the firm A in Poland. The participants were not surprised by the rejection of the French diversity campaign in the Polish subsidiary level and a researcher provided an example of similar diversity campaign displayed in the public sphere in the Czech Republic in 2017 regarding LGBT. It would maybe be interesting for further research to draw parallels with forms of resistance to the western ideas of diversity that are observable in other Eastern European countries, like the Czech Republic.

Based on Thietart (2014), the interpretation of a social phenomenon needs to deal with a constructive reality and observations, which can suggest that the research object and its problematization may need more time to mature and be fully understood.

The first year of Ph.D. started in November 2015 and was marked by exploratory interviews and the research for contacts with multinational companies in Poland aligned with the initial phase of the literature review. The first round of interviews with firm A was held in Poland in August 2016 and the second round of complementary interviews took place in July 2017. Before the interviews onsite in 2017, I organized a few phone conversations with a diversity interlocutor (a compliance specialist) in firm A, but these conversations were not recorded.

During autumn 2017, I identified three other case studies and two months later I started the complimentary interviews. The following figure illustrates the thesis timeline (Figure 26). The literature review included the readings of Polish news alternated with the fieldwork, while the theoretical framework was defined only in the last year of the thesis.

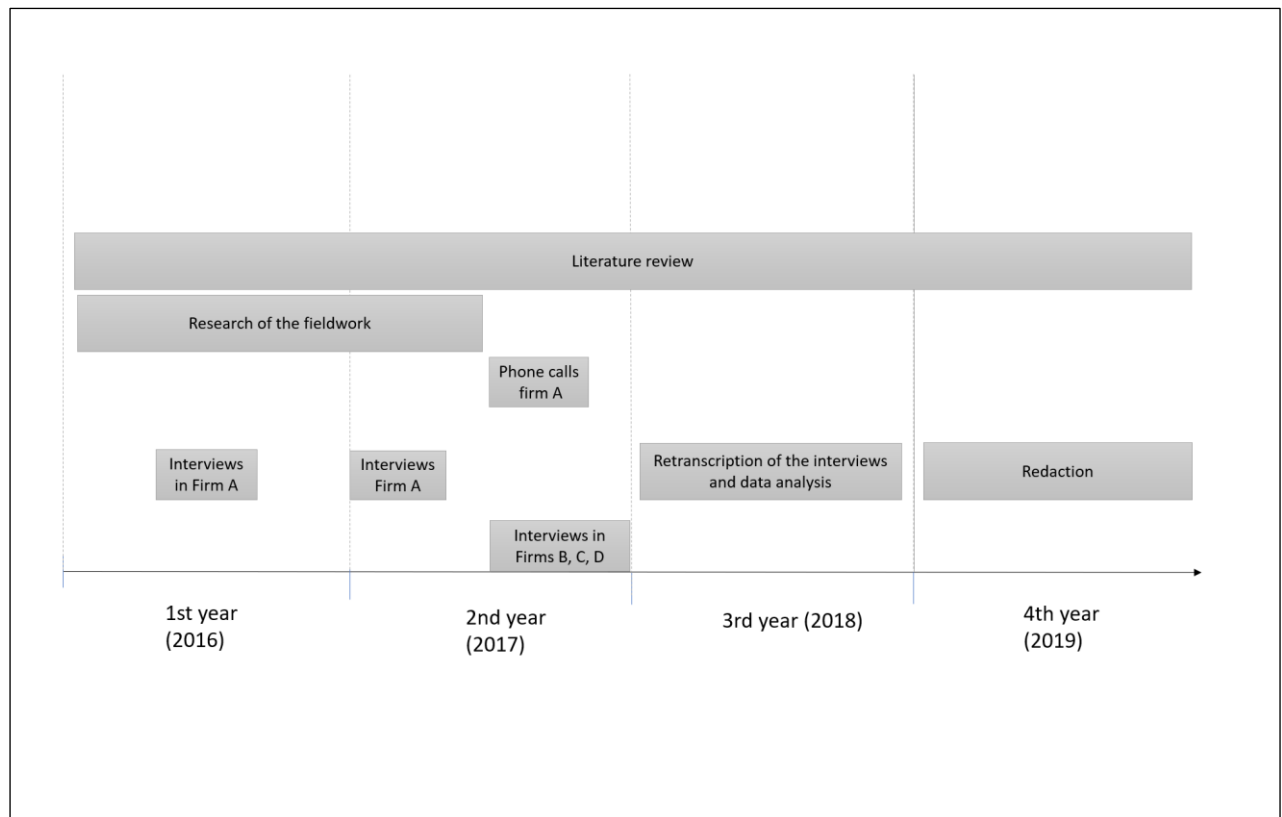


Figure 26 Thesis timeline

#### 4.4. Epistemology

The following section illustrates the epistemology and methodology adopted for the thesis, aiming to provide the key elements of evidence to questions such as: what reality is studied and what are the best methods to analyse it in order to provide scientific objectivity.

It should be noted that the positivist research philosophy is not the aim of this thesis. The positivist approach in management based on generalizable findings and large data samples has emerged in response to Anglo-American pressure trends in research. The advocates of the determinist (the so-called culturalist approach) ignore the plurality and the uniqueness of practices and meanings which may appear in the given cultural area (Blanchot, 2004).

The opposite tendency is being established in social sciences and management studies, and has been underpinned by the anthropological foundations of management since the '50s (Chanlat, 2005). In the '90s, sociologists and ethnologists started to use their method in the organization studies (D'Iribarne, 1998; Dupuis, 2019; Chanlat, 2005; Segal, 2011, 2012, 2014). The marriage of social sciences and anthropology with management studies allowed to decipher the hidden, new features and meanings of organizational practices and explain multiple crucial problems of organizational exploration. This perspective applies specifically to the study of diversity management from the sociocultural and historical standpoint and it constitutes the foundations in which the current thesis is rooted.

### Qualitative analysis

The qualitative methodology initially gained interest in cultural anthropology and social sciences (Chanlat, 2005), but it has also been popularized in management research. It is argued that the qualitative methods in management research are still under-represented (Cassel, 2005) due to the popularity of the positivist approach. Yet, the ontological approach of both qualitative and quantitative methods assumes that the academic research should produce objective and valid results regardless of a desired level of subjectivity.

Therefore, the qualitative method is the most suitable to study the socio-cultural construction of the management initiatives, together with the exploration of the national context in which the local subsidiaries operate. I adopt the qualitative stance in order to decipher the complex nature of diversity management which is an under-explored phenomenon in Poland. There is little scientifically proved knowledge on this topic. I identified the studies on DM by Polish scholars, but as it is mentioned in the literature review, they are based mostly on the quantitative analysis or the analysis of the company's online discourses (Maj, 2017). These methods do not allow to fully understand the issues with DM in Poland and the reasons for the unique adoption or rejection of the western conceptions (Laurent, 1983). For this reason, I argue that the statistical analysis in the current study would be superficial because things like attributed meaning of diversity would be impossible to identify without in-depth interviews with Polish employees. Also, the four companies under study do not communicate externally on their diversity actions and the data is strictly limited to the workplace and communicated

internally, which would make it unsuitable to conduct such quantitative exploration through the web.

### Constructivism and interpretation technique

Another perspective adopted in this thesis is constructivism. The relationship between a researcher's perspective and the interviewees' perspective is not neutral and is induced by the socio-historic background of a researcher (Van Maanen, 1979). In the same way, this epistemological approach serves to analyse the phenomenon in management that has been socially constructed. Although constructivism was popularized in the social sciences and refers initially to ethnographic methods of analysis, it has gained an important role in management studies which use the method of interviews.

The thesis is informed by a meaningful interpretative approach to study a culturally rooted management phenomenon in Poland. Despite the criticism of this methodology regarding the integral dimension of subjectivity or an eventual lack of rigor, it has been shown in several empirical qualitative investigations (D'Iribarne 1998; Chevrier, 2003; Segal, 2011, 2017) that the interpretative techniques serve to reinforce the insights and discovery as well as encourage a reflective approach to study a management phenomenon. Therefore, these studies are inscribed in the principle of triangulation and deploy multiple methods (ethnography, observations, interviews and case studies), which increases the validity of the findings.

Blanchot (2004) argues that the interpretative approach is important for a researcher but also for managers whose mission is to interpret the ways in which local people think and act in the workplace. Yet, based on my previous professional experience in the French headquarters of firm A, I realized that despite the annual questionnaires, the transfer of the French project of a global policy and a communication campaign has failed because of a missing interpretative lens to examine the meaning the Poles provide to their actions.

In this regard, D'Iribarne (2009) argues that the interpretative method is relevant while attempting to identify the role that national culture (D'Iribarne, 1998; 2009) plays in organizations, more precisely in the meaning associated with organizational life and various practices within the given organizations. According to the author, the interpretative approach

aims to challenge the premise of generalizable findings through the empirically grounded comparative analysis which often highlights contrasting, sometimes shocking attitudes of the local actors (D'Iribarne, 2012). The comparative analysis and the interpretative approach allow to decipher the unique meanings that the local employees give to management situations (interpretation process) and tools, but also allow to make a connection with the hidden and underlying mechanisms of social life within multinational firms (Segal, 2011).

According to Thietart (2014), the interpretive approach consists of:

*“apprehending the phenomenon established by individuals who create their reality through language, local representations, motivations, and individual intentions”.*

(Hudson & Ozanne, 1988).

Thietart (2014) explained that the construction of a research object requires a deep immersion in the social environment. Also, this process requires two stages which bundle together a constant interaction between the researcher and the studied phenomenon, as well as the comprehension of the social reality in which the phenomenon is embedded. The following figure illustrates the conditions for the construction of the research object adopted in the interpretive approach.

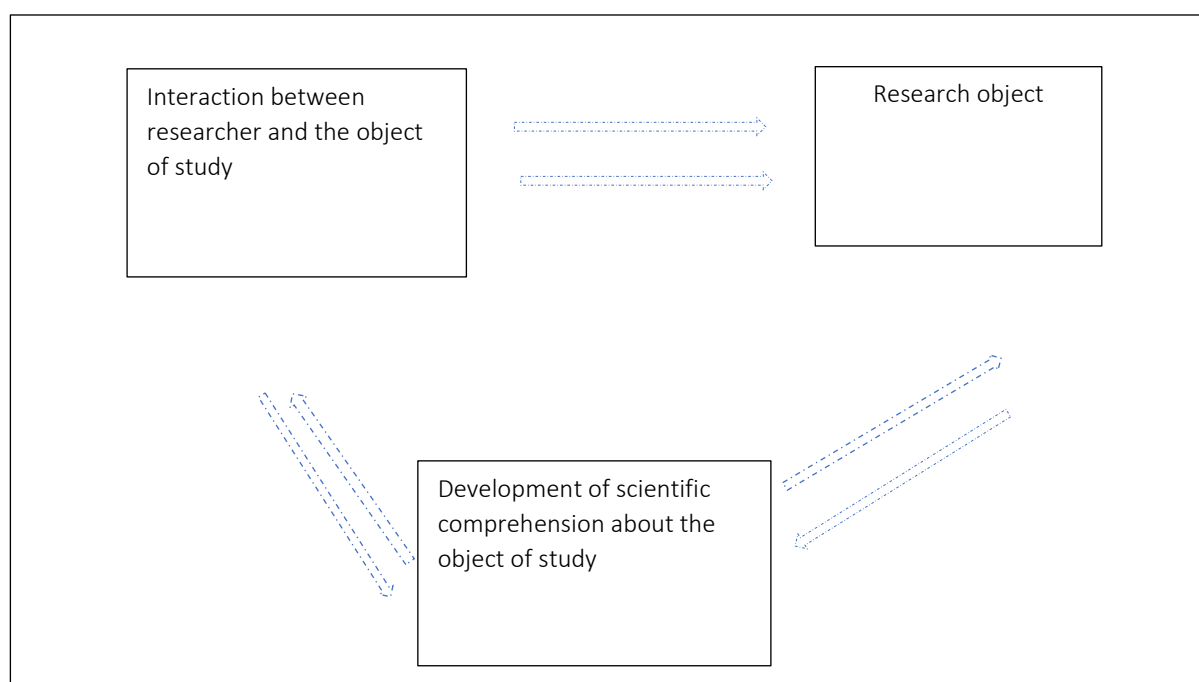


Figure 27 The construction of a research object in the interpretive approach. Source: Adopted from Thietart 2014

#### 4.5. Data collection

*In fact, there are probably as many approaches as researchers.*

(Eisenhardt, 1989)

The thesis employs a multiple case study of four polish subsidiaries of multinationals in various sectors: energy production, services, finance and biopharmaceutical. The Polish subsidiaries of firms B, C and D are in Warsaw, while the Polish site of firm A is located in Cracow.

The next figure (Figure 28) illustrates the pictures taken onsite in firms A and C, to show the environment in which the interviews took place. The figure illustrates the images of the companies and highlights the contrast between firm A and other companies.



The production building

The shared services centre



**Firm B**, Google maps, 2018



**Firm C**, Google maps, 2019



**Firm D**, Google maps, 2019

Figure 28 Presentation of case studies. Source: Google, 2019



### Multiple case studies

The methodology of multiple case studies (Eisenhardt, 1989) is a classical method largely recognized in management studies. This thesis adopts a multiple case study analysis with a dominant case of firm A for three main reasons. First, from the methodological standpoint, data from the production company is the most voluminous (two rounds of the interviews and other internal data). Second, it illustrates the main characteristics regarding the “failure” of DM. Third, there is little research on DM in the production sector. In the same time, Firm A provides an interesting contrast with the innovation company (firm D), which seems to be the most advanced case study in terms of maturity of DM (Wieczorek-Szymanska, 2017).

The aim of this thesis is not to generate a theory based on empirical findings but to challenge the existing literature, especially the Anglo-American approach to DM. The intention of the multiple case study was to show the plurality of DM adoption in different sectorial contexts, with a major focus on one case study, which allowed to gain deep insights into the organizational circumstances of a DM “failure” in Poland.

The multiple case study applies a multitude of levels of analysis, which in this case have a double character: level of national context (macro) and organizational reality - sector and organizational life (mezzo). The analysis did not lead to the generalization of patterns between the case studies (Eisenhardt 1989), but suggested the generalization of the cultural foundations of the phenomena of diversity management, meaning that all the case studies are inevitably inscribed in the same conditions of the cultural context.

The selection criteria of the case studies are: belongingness to a multinational company, evidence of diversity management (whether there is a signature of a diversity policy, diversity charter and other practices or not) and the sector (any other than production and ideally a creative industry).

### Interviews

Drawing on an in-depth methodology, the thesis employs semi-directive interviews (Romelaer, 2005) with an exploratory character. The open-ended question allowed to set the main

direction of the conversations, allowing the interviewees who are not necessarily familiar with the topic of DM to express themselves freely without being constrained to a certain vocabulary.

However, the additional purpose of the interviews was to have a better understanding of the interviewee's position, allowing the interviewees to describe different situations and practices which they find acceptable or unacceptable. The interview questions did not make direct reference to Polish culture but rather to diversity management practices. Nevertheless, discussion on diversity made the interviewees give explicit references within the Polish context.

In order to ensure the success of the process, the interviewees were assured of the anonymity of the conversations. The questionnaire was adjusted in the research process and was accepted by the doctoral supervisor. I travelled to Poland to conduct the interviews in 2016, 2017 and 2018. All the interviews were organized onsite (with a few exceptions, being phone conversations). I conducted between 3 and 6 interviews a day, depending on the availability of the interviewees. Only in the production site, there were two additional interviews that were not planned in advance, as some of the interviewees in the Finance department were invited to the interview spontaneously, in the hall of the building. Also, in firms A and B, I had the opportunity to have lunch in the local canteen with a few interviewees and have an informal "off" conversation. The employees in the service company expressed their enthusiasm, arguing that DM is an interesting research area for the company, while the conversations with the interviewees in the production company were rather related to their private lives and non-professional activities. I also participated in a meeting within the production department with trade unions led by the Members of the Board with regards to the project of carve-out after the sale of the company. This meeting has shown me that the representatives of the blue-collar workers have a capacity to openly express their resistance, disappointment and ask sometimes direct problematic questions.

The interviews were conducted mainly in Polish, except the interviews with people of other nationalities (English) and two interviews in French. All the interviews, except the informal conversations during lunchtime, were recorded and transcribed. The interviews in English and in French were kept in their original language.

The next section illustrates the information about the stakeholders interviewed for this thesis.

I conducted 64 interviews in total. The first round of interviews took place in the firm A between August 2016 and September 2016 and the second round of interviews in May 2017, for a total of 35 interviews in firm A.

| Nr | Position                                            | Department            | Nationality | Generation | Remarks                                 | Date  |
|----|-----------------------------------------------------|-----------------------|-------------|------------|-----------------------------------------|-------|
| 1  | Executive Board, Finance Director                   | Finance               | French      | X          | Interview in French                     | 09/16 |
| 2  | Director of Employees and Social Affairs            | Social affairs        | Polish      | X          | Phone, Located in power plant in Rybnik | 09/16 |
| 3  | Audit and Ethics specialist                         | Compliance and Ethics | Polish      | Y          |                                         | 09/16 |
| 4  | Compliance Director                                 | Compliance and Ethics | Polish      | Y          |                                         | 08/16 |
| 5  | Audit specialist                                    | Compliance and Ethics | Polish      | Y          |                                         | 08/16 |
| 6  | Communications manager                              | Communications        | Polish      | Y          |                                         | 08/16 |
| 7  | HR administration specialist                        | HR                    | Polish      | Z          |                                         | 08/16 |
| 8  | Project support                                     | Communications        | Polish      | Y          |                                         | 08/16 |
| 9  | Training manager                                    | HR                    | Polish      | Y          |                                         | 09/16 |
| 10 | Vice Director of risk management and system control | R&D                   | Polish      | Y          |                                         | 08/16 |
| 11 | Director of Risk management                         | R&D                   | Polish      | X          | Interview not planned                   | 09/16 |
| 12 | Quality Environment Director                        | Power plant           | Polish      | X          | Interview not planned                   | 09/16 |
| 13 | Quality management specialist                       | Power plant           | Polish      | X          | Reluctance                              | 09/16 |
| 14 | Vice Director of R&D                                | R&D                   | Polish      | X          |                                         | 09/16 |
| 15 | IT manager                                          |                       | Polish      | X          |                                         | 09/16 |
| 16 | Hr Business partner                                 | HR                    | Polish      | Y          |                                         | 09/16 |
| 17 | Auditor specialist                                  | Compliance and Ethics | Polish      | Y          |                                         | 09/16 |

Figure 29 Interviews in firm A in 2016

## Second round of interviews firm A

| Nr | Position                         | Department            | Nationality | Generation | Remarks                                   | Date  |
|----|----------------------------------|-----------------------|-------------|------------|-------------------------------------------|-------|
| 1  | Compliance and Ethics specialist | Compliance and Ethics | Polish      | Y          | Phone conversation, not recorded (30 min) | 05/17 |
| 2  | Compliance and Ethics specialist | Compliance and Ethics | Polish      | Y          | Phone conversation, not recorded (30 min) | 07/16 |
| 3  | Compliance and Ethics specialist | Compliance and Ethics | Polish      | Y          |                                           | 05/17 |
| 4  | Mechanical Engineer              | Power plant           | Polish      | Y          |                                           | 05/17 |

|    |                                |                       |           |   |                                               |       |
|----|--------------------------------|-----------------------|-----------|---|-----------------------------------------------|-------|
| 5  | Treasury manager               | Finance               | Polish    | Y |                                               | 05/17 |
| 6  | Director Assistant             | Finance               |           |   |                                               | 05/17 |
| 7  | Finance Director               | Finance               | Czech     | X | Fluent in Polish                              | 05/17 |
| 8  | Tax specialist                 | Finance               | Polish    | X |                                               | 05/17 |
| 9  | Controlling specialist         | Finance               | Polish    | Y |                                               | 05/17 |
| 10 | Compliance manager             | Compliance and Ethics | Polish    | Y | Previously R&D, currently responsible for D&I | 05/17 |
| 11 | Compliance manager             | Compliance and Ethics | Polish    | Y |                                               | 05/17 |
| 12 | Risk management Director       | Compliance and Ethics | Polish    | Y |                                               | 05/17 |
| 13 | IT manager                     | IT                    |           | Y |                                               | 05/17 |
| 14 | Contract specialist            | Finance               | Ukrainian | Z | Started as an intern, Fluent Polish           | 05/17 |
| 15 | Quality specialist             | Compliance and Ethics |           | Z | Part of the diversity team                    | 05/17 |
| 16 | Contractor (External employee) | R&D                   | French    |   | A former employee of firm A in France         | 05/17 |
| 17 | Quality manager                | Power plant           | Polish    |   | Previously assistant                          | 05/17 |

Figure 30 Interviews in Firm A in 2017

The next figure illustrates information on the interviews in firm B.

| Nr | Position                          | Department               | Nationality | Generation | Remarks          | Date  |
|----|-----------------------------------|--------------------------|-------------|------------|------------------|-------|
| 1  | Recruitment manager               | HR                       | Polish      | Y          | D&I Lead         | 09/17 |
| 2  | Recruitment specialist            | HR                       | Polish      | Y          |                  | 09/17 |
| 3  | Recruitment specialist            | HR                       | Polish      | Y          |                  | 05/17 |
| 4  | Communication specialist          | Communication            | Polish      | Z          |                  | 09/17 |
| 5  | Communication Director CEE region | Communication            | Polish      | Y          | Phone interview  | 09/17 |
| 6  | Business development manager      | Sales                    | Polish      | Y          |                  | 09/17 |
| 7  | Training specialist               | HR – Learning department | Polish      | Y          | Fluent in Polish | 09/17 |
| 8  | Controlling manager               | Finance                  | Polish      | X          |                  | 09/17 |
| 9  | IT Manager Cee region             | Finance                  | German      | Y          | Fluent in Polish | 09/17 |

Figure 31 Interviews in firm B in 2017

The interviews in firm C.

| Nr | Position | Department | Nationality | Generation | Remarks | Date  |
|----|----------|------------|-------------|------------|---------|-------|
| 1  | Auditor  | Finance    | Polish      | Y          |         | 11/17 |

|    |                                           |            |        |   |  |       |
|----|-------------------------------------------|------------|--------|---|--|-------|
| 2  | HR Director                               | HR         | Polish | Y |  | 11/17 |
| 3  | Business development specialist           | Sales      | Polish | Y |  | 11/17 |
| 4  | HR Business partner (operations)          | HR         | Polish | Z |  | 11/17 |
| 5  | HE Business partner (employee engagement) | HR         | Polish | Y |  | 11/17 |
| 6  | Manager                                   | Sales      | Polish | Y |  | 11/17 |
| 7  | Anti-Fraud manager                        | Finance    | Polish | Y |  | 11/17 |
| 8  | Accountant                                | Finance    | Polish | X |  | 11/17 |
| 9  | IT manager CEE region                     | Finance    | Polish | Y |  | 11/17 |
| 10 | HR Business partner                       | HR         | Polish | Y |  | 11/17 |
| 11 | Compliance Director CEE Region            | Compliance | Polish | Y |  | 11/17 |

*Figure 32 Interviews in firm C in 2017*

### Interviews in firm D

| Nr | Position                                         | Department      | Nationality | Generation | Remarks              | Date  |
|----|--------------------------------------------------|-----------------|-------------|------------|----------------------|-------|
| 1  | Hr technical support                             | HR              | Polish      | Z          |                      | 11/17 |
| 2  | Compensation &Benefit specialist                 | HR              | Polish      | Y          |                      | 11/17 |
| 3  | Global procurement manager                       | Procurement     | Polish      | Y          |                      | 11/17 |
| 4  | HR Business partner                              | HR              | Russian     | Z          |                      | 11/17 |
| 5  | Regional HR Services Lead for EMEA (HR Director) | HR              | Polish      | Y          |                      | 11/17 |
| 6  | Data manager                                     | Data management | Indian      | Y          | Interview in English | 11/17 |
| 7  | Business analyst                                 | Analytics       | Italian     | Y          | Interview in English | 11/17 |
| 8  | Analyst                                          | Global rewards  | Lithuanian  | Z          | Interview in Polish  | 11/17 |
| 9  | Enablement manager                               | Enablement      | Mexican     | Y          | Interview in English | 11/17 |
| 10 | Recruiter                                        | HR              | Polish      | Y          |                      | 11/17 |

*Figure 33 Interviews in firm D in 2017*

All foreign employees in firms A and B speak fluent Polish, while most of the foreign employees in firm D speak only English. The duration of the interviews was agreed on before the research access and was usually between 40 minutes and 1 hour.

The first round of interviews (exploratory) made clear the importance to focus on nationality and made me realize that there is a real discrepancy between the research and the perceived value of DM in the Polish subsidies and even more in its adoption in the production sector. The supplementary interviews were valuable, as they allowed to confirm the initial hypothesis of a

sectorial burden and added to the analysis providing new insights based on internal documents.

The following figure presents the interviewees' management levels.

| Level of Management     | Number |
|-------------------------|--------|
| Directors               | 10     |
| Managers                | 21     |
| Specialists             | 20     |
| Operations (Production) | 3      |
| Others                  | 10     |

*Figure 34 Interviews-Levels of management.*

### Data Sources

In firm A, I have collected a large database provided by a Compliance manager. The data of firm A contains communication campaigns (posters), articles from the company magazine, internal presentations, reports (Gender equality European and international standard, GEEIS), communications from diversity day. In firm B, I had the opportunity to consult the diversity and integration policy. In firm C, the HR Director sent me a PowerPoint presentation called the “Winning the talent war. Challenge accepted” labelled as “strictly confidential”. While in firm D, I received the employee statistics illustrating the number of foreign employees, their nationality and occupation, but these numbers are strictly confidential.

I also wrote an article for the internal magazine of firm A as a result of the study (included in the appendices). I was asked to select a few citations which emphasize the positive outcomes of DM in firm A. The citations were later modified and adapted to the organizational communication needs.

Regarding the internal data, I collected the document mentioned below. The following figure does not include the external documents, such as online diversity and inclusion policies, which have been mentioned in the results.

|        |                                                                                                                                                                                                                                                                                                              |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Firm A | <ul style="list-style-type: none"> <li>• Ppt. Signature of Diversity Charter (2015)</li> <li>• Ppt. Diversity and Ethics strategy (2017)</li> <li>• Diversity days Ppt. (2015, 2016, 2017)</li> <li>• Diversity week, 2014, Ppt.</li> <li>• Company magazines (article)</li> <li>• Safety message</li> </ul> |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|        |                                                                                                                                                                                                                                                                              |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|        | <ul style="list-style-type: none"> <li>• Internal employee structure (2017)</li> <li>• Internship Ppt. (2015)</li> <li>• Communication campaign (2015)</li> <li>• D&amp;I global dashboard</li> <li>• My article for the company magazine, 2017</li> <li>• Others</li> </ul> |
| Firm B | <ul style="list-style-type: none"> <li>• Diversity day, 2018</li> </ul>                                                                                                                                                                                                      |
| Firm C | <ul style="list-style-type: none"> <li>• Winning the Talent war. Challenge accepted, Ppt. 2017</li> </ul>                                                                                                                                                                    |
| Firm D | <ul style="list-style-type: none"> <li>• Internal employee statistics, 2017</li> </ul>                                                                                                                                                                                       |

*Figure 35 List of the internal documents around D&I*

Nevertheless, the access to internal documents was not always consistent. For example, in firm D, I was told that the company does not have relevant data for the research or that the content is confidential and reserved only for the employees. Yet, in firm D, one of the employees showed me a presentation on diversity statistics on his laptop, allowing me only to take notes from two slides of the power point. This is how I learned that the company employs 4 % of foreign employees.

The thesis draws also on the grey literature, the part regarding the Polish context, and contains public reports, press articles, data from the web of the Polish government, Eurostat reports, etc.

#### 4.6. Data analysis

As mentioned in the previous part, the first insights came after the complementary interviews in firm A. Even if the main data analysis started after data collection, due to the exploratory character of the thesis, the action of getting back to the literature occurred alternately with data analysis.

Considering the interpretative approach, the process started with the manual coding of the interviews. The first round of interviews in firm A was transcribed manually. Transcription of additional interviews was “voice dictation” in Google Docs. I verified and corrected the interviews manually while using my voice, which allowed me to repeat the phrases and dig deeper into the point of view of my interviewees and analyse the meaning behind their words as well as their intonation.

The process of coding consists of interpreting the empirical elements of evidence in order to elaborate the theory or the concept of explaining the social phenomena (Thietart, 2014). The

manual process of coding was characterized by two levels of abstraction. The validity of the manually coded findings can be supported by the in-depth analysis of the interviews, their context and permanent reflexivity. Regarding the lack of theoretical data on the subject matter, I haven't used the prefixed template with thematic categories.

The first level of abstraction was closed to the process of open coding (Corbin & Strauss 1990) and draws on the interviews in all four case studies. At the beginning of the data analysis, I came through a large amount of data, but it wasn't clear at this stage what was meant behind the label "diversity management" in Poland. I assigned a general code "diversity policy" and "diversity management in practice". However, the interviewees explicitly referred to diversity management while describing other management situations, which went beyond the area of HR management. I started to group the converging description from different interviews which contributed to the emergence of the concept of "international openness". Because the concept of "international openness" is not recognized in the literature, this denomination came exclusively from the fieldwork (Glaser, 1978). According to the method of open coding in qualitative research, the next step consisted of coding more data and the following description of the theme of "international openness" and its main characteristics.

Regarding the findings of the failure of DM in firm A, I applied a similar method of open coding. At the first level of abstraction, I started by regrouping data which suggested the reluctance of Polish employees towards the practice of diversity management. The next step of open coding and literature review allowed me to come up with the concept of "resistance" towards diversity management. The last stage of a larger data analysis and the literature review has led to the identification of DM "failure".

Afterwards, following the open coding, I applied what can be called "axial coding" (Corbin & Strauss, 1990) in order to closer examine the importance of the companies' context and the profile of the employees (for example difference between the interviews with Polish employees and other nationalities as well as generations).

I started to compare data from the case studies, focusing on the convergent and divergent elements of evidence. I also wrote a 54-page long memo to resume the differences between the companies, based on the following criteria: sector, historical background of the subsidies, characteristics of the workforce, type of stakeholders (employees, clients, suppliers, etc.), type



of product/service, innovation, geographical scope of firm activity in Poland (local vs. international). Afterward, the manual coding led to a conclusion about the sectorial contextualization.

In addition to this, I was interested in how the national context shapes the diversity management practices and fosters conflicting attitudes towards it: failure of DM and enthusiasm towards another new form of DM viewed as international openness. Afterward, I identified in the interviews the abstract term “Polishness” and therefore I applied the code “Polishness” as I strived to decipher its complex meaning and describe it.

I strived to understand why the Polish employees talk about the “Polish world” (interview, firm B) while discussing the phenomenon of diversity management which is the opposite of a multicultural work environment. Drawing on the analysis of the Polish context (Chapter Literature review) it became clear that the term “Polishness” cannot be understood without the consideration of the concept of “the national identity” or the “feeling of belonging to the nation” (Bartminski, 2002; Mencwel, 2002). This hypothesis was confirmed by Polish scholars in migration studies (Lodzinski, 2012; Tabaszewska, 2016).

The interpretation was key to the coding process. For this reason, the use of software in the qualitative analysis, such as Nvivo, was irrelevant in both aspects, coding and data analysis. First, the coding process was not evident because, at the beginning of the investigation, the focus of the study of DM was too large (due to the exploratory character of the study and lack of the relevant theoretical evidence in Poland).

Data analysis aimed to get a deep dive in the interviews with a particular focus on the impact of the local context. Regarding the last aspect of the organization of such large data, I used of the following technique: writing memos and making notes on my laptop and in my notebook (3 notebooks with notes of the interviews).

#### The interpretation of visual internal data

The analysis of the interviews was enriched by the analysis of the visual data. For instance, D'Iribarne (2012) applied the interpretative techniques to the written elements of evidence such as annual reports, corporate documents, and communication documents, arguing that it

can “reveal the apprehensions inhabiting the person speaking” and “provide the clues” that are a meaningful, additional source of information for a researcher.

The insights from the visual data seem to provide evidence of the “failure” of DM in the case of firm A. During the research period, I was often intrigued by the lack of data explicitly illustrating the implementation of DM policies and practices in the Polish subsidiaries as well as the surprising findings which do not refer to DM at the surface level (for instance the shift from the meaningful DM practices to the neutral attributes of diversity). In the process of visual data analysis, I posed the simple questions: What elements of DM are illustrated in the Polish DM artefacts (level of description) and how does the organizational and/or cultural context shape the DM organizational practices?

Most importantly, the findings from the interviews confirm the insights from the written documents and therefore the principle of data coherency is respected. Therefore, the visual data prevented me from providing subjective findings based on the interviews. I strived to keep the analysis distinct from my personal background and the role it can play in the research process and assumptions of the findings.

#### 4.7. Reflexivity and personal background

According to Chanlat (2005), reflexivity applies to the method of participant observation as well as the interviews, which leads to acknowledging the social construction of the findings in management and social sciences. Reflexivity consists of a limited self-identification with the research object, a correct distance with the interviewees (especially if they come from the same cultural area as a researcher) while keeping in mind the importance to safeguard human capacities such as empathy or intuition. Reflexivity prevented me from making the initial judgments of the situation and interviewees which could lead to the extensive subjectivity and premature findings.

In this case, a dose of subjectivity was necessary to gain the trust of the interviewees and interpret the findings. Indeed, the interviews mainly with Polish employees conducted in the Polish work environment required a certain understanding of the context beyond intercultural competencies. It was indeed very different to conduct an interview with a Pole compared to a

foreigner. For example, in the interviews with Polish employees, I found it necessary to present myself not as a researcher, but rather as a Polish colleague ignoring the fact that I was conducting research on a problematic topic such as diversity management. Also, I felt less comfortable when asking the interviewees about the topics related to discrimination and I felt that they preferred to discuss other topics and often tried to change the topic of the conversation, especially the employees in the production and operations departments in firm A.

During the interviews with foreign employees I could act more as an objective researcher who is conducting research and who is not taking part in any of the cultural groups (the Poles or the foreign employees). I thought that my position was not impacted by the polarization between the “Poles” (us) and the foreigners (“them”) but rather by the fact that I came as a researcher from the headquarters’ country.

I am a native Pole and both my parents are Polish as well. I finished my studies in France where I lived for 5 years and only recently have I moved to Ireland. The accession of Poland to the EU in 2004 made it easier to study abroad. Having studied in France during my master studies, I was always interested in different national cultures and the way they impact social life. After my internship in firm A, I developed an interest in diversity, specifically on cultural diversity.

Five years later I realized that I am part of the large groups of Polish people on emigration, but I would describe myself as a Pole on emigration as well as a European citizen. For me, a Polish international citizen is a citizen who can travel and work abroad without restrictions but also a citizen who is able to see the value of European integration and its cultural diversity. I was often surprised by the fact that I feel the strong belongingness to my natal country due to the family relationships but also the feeling of belongingness to the Polish territory through birth. At the same time, I feel very distanced from the national culture, especially after the elections in 2015 and the following socio-cultural changes which occurred in different spheres of public life.

It was more natural for me to conduct interviews in the Polish language from a linguistic perspective. However, from the refined perspective, I preferred to conduct interviews on diversity and discrimination-related topics in English and French due to the shared clarity, acceptance and availability of terminology. It was a major advantage that I speak Polish, which

enabled me to talk in the native language with Polish employees about the issues of cultural diversity. Reflecting on my personal background, my multicultural background and Polish origins made it easier to reflect on the problematic facets of diversity management during the research process.

#### 4.8. Conclusions

This chapter outlines the research design and methodology for this thesis. First, it looks at why the qualitative methodology and interpretative paradigm are the most relevant for studying the phenomenon of DM in the Polish context. It draws on the abundant literature in DM which underlines the importance of context while considering the theoretical framework (national perspective) as well as the methodology (interpretative paradigm).

Also, scientific objectivity accompanied by a level of subjectivity is appropriate to decipher a real understanding of DM practice and policies in Polish subsidies, while going beyond a limited character of externally and internally communicated compliance commitment.

Next is the value of a multiple case study in four Polish subsidies across sectors with a dominant case study of a production company (firm A). The special focus on the production company has allowed to reveal the key research findings regarding the sectorial contextualization of DM and specifically neutral aspects of diversity. The thesis has an exploratory character, as it explores the relatively recent phenomenon of Polish DM, which has not been studied before with a qualitative methodology of a multiple case study and in-depth interviews. Moreover, the thesis is aligned with the principle of triangulation of data as it is based on multiple sources, from interviews, visual data, internal documents and policy documents.

Finally, the chapter ends with the section dedicated to my personal background and associated reflexivity, which played an important role in the data interpretation process. The analysis of a “pragmatic” and realistic DM agenda requires to take into consideration the cultural and personal background of the researcher.

## 5. CHAPTER FIVE - Findings

## 5.1. Introduction

This chapter aims to demonstrate the role that the unique national and organizational contexts play in a cross-country transfer of DM practices and policies in Poland. Multinationals often ignore the inter-national and intra-national variations of diversity management and lack awareness of trivial DM practices at the subsidiary levels. The classical HRM meddling, with a focus on target recruitment and non-discrimination measures (with regards to nationality), is superficial and diluted in the Human rights policies or Diversity Charters. The risks of discrimination, xenophobia, racism or the lack of an open attitude towards specific dimensions of diversity might occur in the multinational companies located in Western parts of the world as well as in Eastern European subsidiaries.

The findings concentrate on a dominant case study of the production company (firm A) based on the volume of data. The case study of firm A is an excellent example of unfulfilled hopes of the headquarters' DM team for the achievement of the standardized policies aligned with the interests of a global corporation. The analysis is followed by three complementary case studies (firms B, C, D) that are different from the case study of firm A.

The case-study analysis starts with the presentation of the firms embedded into specific organizational contexts. The following part briefly presents the practices and policies respectively in firm A, followed by firms B, C, D. The section highlights, on the one hand, the organizational specificities which differentiate the case studies and on the other, the converging elements which explain common cultural indicators for the localized DM practices.

### Presentation of case studies

The primary purpose of this section is to provide the contextual information about the case studies, to illustrate their "unique identities" (Barmeyer & Davoine, 2011). For example, it highlights the "failed" diversity policy implementation and its complete abandon after the sale of the company (firm A) in 2017. It also looks at the sectorial contextualization of DM within the single cultural context.

In Figure 36 are some key aspects of the company's backgrounds and their activity in Poland. This part draws mainly on internal and external data gathered from the websites, annual

reports, online presentations, press articles, scientific publications as well as the fieldwork. These insights include internal workforce statistics, recruitment needs, and other relevant themes.

|                                                    | Firm A                                                   | Firm B                         | Firm C                           | Firm D                                 |
|----------------------------------------------------|----------------------------------------------------------|--------------------------------|----------------------------------|----------------------------------------|
| <b>Sector</b>                                      | Energy production                                        | Life quality services          | Financial and insurance services | Clinical trials centre, Innovation hub |
| <b>HQ</b>                                          | French                                                   | French                         | German                           | US/Sweden                              |
| <b>Employees</b>                                   | Poland 2836 (650 in Cracow)<br>HQ 64000<br>World 160,000 | Poland 2000<br>World 428 268   | Poland 2000<br>World 144 553     | Poland 1600<br>World 59700             |
| <b>% of foreigners in the Polish units</b>         | 0.2%                                                     | 1%                             | 2 persons                        | 4%                                     |
| <b>Nationalities (except the Management Board)</b> | France<br>Ukraine                                        | Belarus,<br>Ukraine<br>Germany | Slovakia                         | 30 nationalities <sup>23</sup>         |

*Figure 36 Presentation of case studies, 2018.*

The presentation of the case studies includes:

- The scope of the firm's activity (local vs. international) and sector
- Historical background in Poland (past of privatization, acquisitions or mergers)
- Employee structure (nationalities, qualifications, age)
- Recruitment needs
- Corporate language (Polish vs. English)

<sup>23</sup> Armenia, Australia, Belarus, Brazil, Croatia, Russia, Spain, India, Ireland, Lithuania, Mexico, Germany, Portugal, Czech Republic, Ukraine, USA (internal statistics, 2018)

## **Firm A**

Firm A produces electricity and heat for local communities in Poland. The electricity production in Poland depends on around 94% of the national resources of coal and is the primary consumer of coal in the country. Firm A is committed to serving local communities while working closely with local shareholders. The CEO (2015) argued that: *"We continually take on and successfully meet challenges like developing our activities and our partnerships with local communities, while at the same time respecting the values of our Group."*

The power plant in Cracow is composed of a shared service centre, the production administration building and the power plant. The energy production sector in Poland is relatively old and underwent numerous disruptions such as privatization, restructuration followed by massive dismissals in the production plants two decades ago and more recently the sale of the company. Trade union members are reluctant towards headquarters. For instance, a statement of the Head of the Trade Unions "Solidarnosc" (web, 2013), dating back to 2013, refers to a manifestation of Trade Unions of firm A against the program of restructuration and the establishment of the shared services: *"Under the cover of the experimentations and programs with a catchy name, there are real people. These people are the employees with experience of 20 years and more, [...] Why the French headquarters did not conduct the same experimentations in the host country?"*. (President of Trade Unions, public letter, 2013)

## **Historical background**

As a result of the privatization of firm A in 1998 to French investors, the small companies within the firm were consolidated and were soon expected to adopt the rules of the global, international company (Milek, 2015). The French Group became an important stakeholder in the production of electricity and heat on the Polish market, holding 99,5% interest ownership in the capital of the Polish firm (2016). Trade unions played an important role in the easement of social rights of the workers and massive dismissals of blue-collar workers that occurred two decades ago. This may also explain the interference of the Polish government in the process of the sale of firm A in 2017, which blocked the possibility of the sale to foreign-capital companies.

## **Employee structure**

Production workers represent more than half of the permanent staff in the site in Cracow and employees from generation X (between 45-55 years old) count for more than 50% of the total workforce. However, over the last decade, a mix of generations X and Y (people between 25 and 35 years old) were recruited, mainly due to the massive retirements estimated to occur starting 2020. The "blue-collar" workers are highly qualified profiles in the energy production technology and occupy specialized professions from energy engineer, gas engineer, electrical engineer, heating and plumbing engineer, machine automatization engineer, to the site engineers, as well as the non-qualified workers such as electricians or technician support (Reference document, 2016). The competencies of production workers are very rare and difficult to find on the domestic labour market because of the relatively old technologies and specific skills. Most production workers have not completed their higher education but have forged their profession through work experience in the energy production sectors especially in firm A. Firm A in Poland employs only 0,2% of foreigners and 50% of all foreigners are French Directors in the Management Board.

## **Recruitment needs**

The company opts for the promotion of internship programs at the plant level to enhance the knowledge transfer between the employees from generation X to new hires. The number of available positions in general is rather low. While the French headquarters have defined the 2020 objective to renew the workforce and use diversity policy to attract candidates, the search for international skills was not the priority of the HR department in Poland (between 2015-2017).

## **Corporate language**

Polish is required for most of the roles except the Executive Management Board. French and English language skills were required for the positions of director assistant (Interview, 2017). At the same time, most of the production workers only speak Polish, while some administrative workers (people of generation Y and Z) may use English or French in written communication with the headquarters.



## **Firm B**

Firm B is an outsourcing company which provides two types of services: on-site catering services and benefits & rewards services (B&R services) for the local and multinational corporations and public institutions including governmental bodies. Firm B in Poland leverages its position as “a national leader in food services and facilities management” (firm B, website, 2017) and positions itself as “a firm with an international purpose” (web, 2017) after the acquisition by the French investors.

### **Historical background**

Firm B was founded in 1966 in France and has been present in Poland for more than two decades, with on-site services since 1993. Back in 1993, the Polish subsidiary provided traditional catering services to the domestic market. In 2017 the previous country CEO announced that one of the biggest challenges was to find the right candidates that correspond to the local market needs and reflect the “local client’s mindset”.

### **Employee structure**

The Management Board is composed of three French members and one Polish, but the firm is not nationally diverse at other levels of management. Most employees are Polish, except for some foreign employees from Belarus or Ukraine. The average age of employees is between 30 and 35 years, with Millennials’ employment on the rise. Members of Generation X constitute the least numerous employee group and hold the senior leadership positions.

### **Recruitment needs**

Recruitment needs in the B&R services department are inexistent. For instance, there was no available vacancy in Benefits & Rewards Services in Poland on the website between June and November 2017. The number of available roles is deficient in Warsaw in areas of Business Development, Purchase, Accounting, Finance, Legal advisory, HR, IS&T, and Marketing & Communication. Recruitment is one of the main challenges of on-site food services (e.g. catering, business meetings, lunch service and local canteens). The recruiters seek candidates for the following positions: restaurant managers, waitresses and chefs, but also cleaning service, property management specialists and construction workers. In general, employees in on-site services at the operational level are a low-skilled workforce. As a result of the Poles’ emigration to the West, the shortage of low skilled workers is one of the major problems faced by the on-site service’s branch. There is considerable interest among Ukrainian workers in low-management positions, but they face several administration problems, especially with work permits.

### **Corporate language**

The corporate language is Polish. English is required for the positions at the management level (for example Business development managers who are likely to work with international clients). The use of English is on the rise in the Polish headquarters in Warsaw mostly due to the international workers. Polish is mandatory for outsourced candidates occupying low-skilled jobs, for example waitering or cleaning, which may disqualify foreign employees who are not fluent in Polish. According to Polish recruiters in firm B, no aspect of diversity is considered in the recruitment process. The critical question is about the equal opportunity in the employment of non-Polish-speaking foreign candidates willing to join an international company, such as firm B in Poland. Foreigners (others than the ones fluent in Polish) may face barriers to employment even before the recruitment process, as all the role descriptions are in Polish. Two foreign employees working in the HR department of the company are from Belarus and are fluent in Polish.

### **Firm C**

The third case study is a European company in the financial sector which offers global solutions in insurance and asset management for individuals and business clients. Currently, firm C defines itself as a “corporation with an international reach” (web, 2017). The Country CEO announced a strategic priority to invest in the development of branch offices in urban and rural areas in Poland and to propose insurance services and products to the local communities (2017).

#### **Historical background**

Firm C has been present in Poland since 1997. Most of the Polish banks that were state-owned before 1989 became private companies. The year 1998 was marked by the first phase of the dynamic development of new products and clients in Poland.

#### **Employee structure**

The average employee’s age is 35 years old and the dominant nationality is Polish, except for the Executive levels of management (Country CEO).

#### **Recruitment needs**

The recruitment needs are organized according to two sections: “sales” and “others” (web, 2017). The section “others” comprises jobs ranging from managers, experts, specialists and business analysts. The position of sales agent requires at least a secondary education diploma but is not the primary condition to apply for the roles. The number of available positions was low in 2017.

#### **Corporate language**

English or German language skills are required at different levels of management, especially at higher positions, which gives the possibility to connect with other subsidiaries and headquarters (Interview with Compliance Director, 2017). Connection with clients and international stakeholders is a relatively new phenomenon, which may explain why the diversity policy emerged only recently in 2006. There is a language gap, as employees from generation X, e.g. in the Finance department rarely speak English, while the members of generation Y and Z are often fluent in both English and German. English courses were offered to the permanent staff based in Warsaw, but the descriptions of financial roles are available only in Polish, which can implicitly suggest that the recruitment strategy aims to attract the Polish-speaking candidates ideally with foreign language skills.

## **Firm D**

According to the Country Director (2018), “All in all, Poland is becoming an important global hub for firm D. In 10-15 years, Poland can become a biotech hub comparable to Boston, Silicon Valley, Belgium or Switzerland”. Firm D at the corporate level is a worldwide science-led biopharmaceutical company developing, manufacturing and commercializing medicines. The firm’s activity in Poland consists of discovering medicines and innovating in the existing medicines to treat diseases which threaten millions of patients worldwide (company website, 2017). The company works closely with many international and local stakeholders including healthcare professionals and organizations, patient groups, public bodies, research labs, start-ups and universities. In an interview, the Country Director of the Polish hub stated: “We have built such mindset already and would like to use available good practices of such trusted collaboration from other countries” (2017).

## **Historical background**

In 1992, the Polish representative office of firm D was established, and in 1998 changed its name to firm D (company name) SA. After consolidating the UK company with a Swedish corporation, Firm D became one of the biggest multinational pharmaceutical companies with its corporate headquarters based in London and main R&D centres in the US, Sweden, UK, China, Japan and Poland. The Clinical Trials Centre in Warsaw, also called “The innovation hub” underwent three fundamental development phases. First, a decision to build the centre in Warsaw was announced in 2011. Initially, the centre hired around 200 employees. The following growth phase started with massive recruitment in 2015, which continued until 2018.

## **Employee structure**

In 2019, the company hired 1600 employees in Poland. For instance, the Polish CEO announced the challenge to attract Polish experts who are emigrants, while being focused on “attraction of a diversity of skills” (Interview, 2017). However, the company has 4% foreigners and 30 different nationalities, as compared to 7% foreigners in the R&D centre in the UK. Nevertheless, at 4% foreigners, firm D is one of the most culturally diverse companies in Poland, but this is a result of employee transfers from other subsidiaries located abroad, instead of a local talent attraction and recruitment strategy on the domestic market.

## **Recruitment needs**

The potential candidates should acquire the “Cultural Awareness: be aware of and sensitive to cultural differences and their impact on communication, expectations and performance” (company’s website, 2017). The highest recruitment needs are in the R&D and Clinical Studies. The Pioneer’s roles in the clinical studies department are doctors, pharmacists, physicians, scientists, and other medical affiliate’s roles. The workforce of firm D is highly qualified with rare competencies and expertise that are difficult to find in the domestic market. Furthermore, for the new jobs, the job descriptions are in English. For example, a description for the role of “Global Source to Contract Specialist” indicates that English skills are required and that “Polish is not obligatory” (web, 2019). Also, some roles of business analysts indicate that the “ability to work well in and across diverse global teams” is an essential skill (web, 2019).

## **Corporate language**

English has become an official language in the company and the primary condition to join the Polish hub, as foreign employees do not speak Polish. English skills are required at all levels of seniority across all departments. In addition, the organizational documentation and internal communication remains in its original English version in the Polish subsidiary.

## 5.2. Case study of firm A

The first level of abstraction consists of a formal description of a diversity policy and management instruments to provide the key elements for further analysis of the contextualization of DM. Case study of firm A is a good example of the startling resistance at the subsidiary -level towards the obvious issues related to DM, which has special implications for the surprising, neutral and ironic DM organizational agenda and its problematic nature in the production site.

This section highlights two case scenarios: the global DM practices rejected at the subsidiary level and exposed to a local reinterpretation and the initiatives which emerged exclusively in Poland. The first group of practices sheds light on the extent to which the French ideals of diversity are illegitimate in the Polish cultural and organizational environment, while the second group of practices queries the unique approach of Polish employees in addressing the challenges of DM in firm A in Poland.

### Introduction to DM in firm A

At the headquarters' level, the policy documents are manifested in various connected practices and objectives (KPI's) are focused on making progress towards the establishment of the non-discriminative and inclusive work environment (Internship report, 2015). Except for the Diversity Charter, the "diversity policy", term used by the headquarters, was confusing for local managers who preferred to call it the "international guidelines" that should be respected worldwide. There is no single document labelled as "policy" and there are only a few documents categorized under the umbrella of the policy, such as Diversity Charter<sup>24</sup>, the "Global Compact report of firm A" (2005), Code of ethics (which includes a note about non-discrimination) and the corporate commitment to CSR.

Diversity management policy<sup>25</sup> has emerged in the Polish subsidiary (firm A) as a result of an international transfer from the French headquarters. Historically, the headquarters signed the

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<sup>24</sup> Diversity Charter is a European initiative presented in the form of "a short document, voluntarily signed by companies, which outlines the commitment to promote diversity and inclusion in the workplace, regardless of, for example, age, disability, gender, race or ethnic origin, religion or sexual orientation. The structure of the document is the same for the signatory countries, but is translated in different languages, including Polish.

first national agreements on gender and disability in 1989, but the first milestone in building the corporate policy was reached in 2005, when the commitment to diversity was included in the international agreement on corporate social responsibility and after the signature of Diversity Charter in 2006 in France.

It took over a decade until the Management Board of firm A in Poland signed the Diversity Charter in 2013, but the Charter was accepted by the Trade unions only in 2015, almost ten years after the HQ (headquarters). The official date of the emergence of Diversity Charter is 2015, when it was signed by members of Trade unions (11 men and one woman, all Polish). Shortly after the signature, the Charter was printed and diffused in the corridor of the administration building in Cracow. This special event of the signature of the Diversity Charter was celebrated and therefore, is documented in a presentation (PowerPoint, 2015). The following figure shows the photographs of the signature in 2013 by the HR Director accompanied by the members of the Management Board.



*Figure 37 Signature of Diversity Charter in Poland, Internal documents, 2013*

The Polish subsidiary declared the commitment to principles such as: “Promote Diversity Charter in Poland; Be in contact with the NGO which diffuses the Charter in Poland; Make a performance survey once a year about the policy of equal treatment and diversity policy<sup>26</sup> and

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<sup>26</sup> This commitment translates into the Annual Employee Survey, which covers mainly the topic of discrimination and not diversity.

share the best practices in the area of equal treatment and diversity”. The internal presentation (PowerPoint, 2015) indicates that “long-term action of HR department on many levels of activity” are among other advantages of the implementation of the Charter. However, there is no evidence of the diversity-related practices in the HR management activity except a global declarative commitment, and the Charter does not go any further than the written compliance requirement.

For example, the Polish subsidiary supports the “Ten Principles of the United Nations Global Compact” from 2013, which were disseminated by the headquarters and are therefore expected to translate into business strategy, culture and organizational practices (CSR report, 2015). For example, Principle 6 refers to the procedure of preventing harassment and reinforcing elimination of discrimination in the workplace. The subsidiary declares to have implemented the actions to promote all strands of diversity “(ethnic origin, skin colour, gender, religion, political option, nationality, social background and sexual orientation)” in 2015. It is therefore surprising that in firm A the reason for disregarding dimensions such as nationality, ethnic origins, sexual orientation and religion was: “*there are no problems with other aspects of diversity in the company*” than age or gender (Global Compact report, 2015, firm A).

Furthermore, an informal version of the national Charter in firm A was written in the form of a PowerPoint presentation entitled “Ethics & Diversity strategy” (2017). The document was implemented solely in the R&D Centre in Cracow and did not apply to other production plants. “Ethics & Diversity Strategy” is related to organizational challenges in the context of the current changes in the company’s structure<sup>27</sup>.

Ethics and Diversity strategy is designed to address the problems of the current and critical areas of organizational change due to the sale of the company. The strategy is focused on four main pillars: Organizational Climate (activities of local business units to define desired ethical behaviours); “Carve-out” (or a spin-off process expected to occur after the sale of the company); Rotation Risk (changes in the employee structure of the company due to the possible dismissals); Employees Engagement (gender equality certification (GEEIS) obtained by the Group, including the Polish subsidiary). Local managers attempted to make use of the commitment to diversity and ethics to address the more critical problems and provide it with

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<sup>27</sup> During the investigation preceding the sale of firm A, firm A in Poland has been subjected to the process of carve-out of the local structures.

a more legitimate and pragmatic character, about the uncertain context of the sale of firm A and the possible future reorganization.

The following figure resumes the evidence (the formal documents) related to the diversity (or non-discrimination) policy.

|                                       | Documents implemented in Poland                                                                                                  |
|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Global and Local (Common with the HQ) | Diversity Charter<br>CSR Commitment<br>Code of ethics                                                                            |
| Local <sup>28</sup>                   | Global Compact report of firm A<br>Diversity and Ethics strategy <sup>29</sup><br>Discrimination, Mobbing, and Harassment policy |

*Figure 38 The policy documents implemented at the HQ and the subsidiary level*

#### DM practices in firm A

The process of transferring global DM initiatives and local recontextualization encompasses the period between 2014 (first Diversity Week) and 2017 (abandon of the policy). Between 2014 and 2017 the Polish team strived to develop new DM practices, organize various diversity events drawing on unrelated corporate documents such as CSR policy or Code of ethics used as legitimation for not implementing the HQ's DM agenda based on the value of creating a diverse workforce across the business. The following section will highlight the extent to which the typical global DM standards do not make sense for Polish employees: those who oversee local adaptation of DM (compliance) and those who are the local recipients (other departments).

<sup>28</sup> Global and Local means the documents that are common for the group. Local initiatives include the written documents (corporate statements) which are either limited to the Polish subsidiary or they are contextualized locally, which does not exclude a possibility that the headquarters has developed a similar initiative. The figure does not include the written documents at the HQ level which is not the objective of the present analysis.

<sup>29</sup> Diversity and Inclusion strategy applies only to the production plant in Cracow.

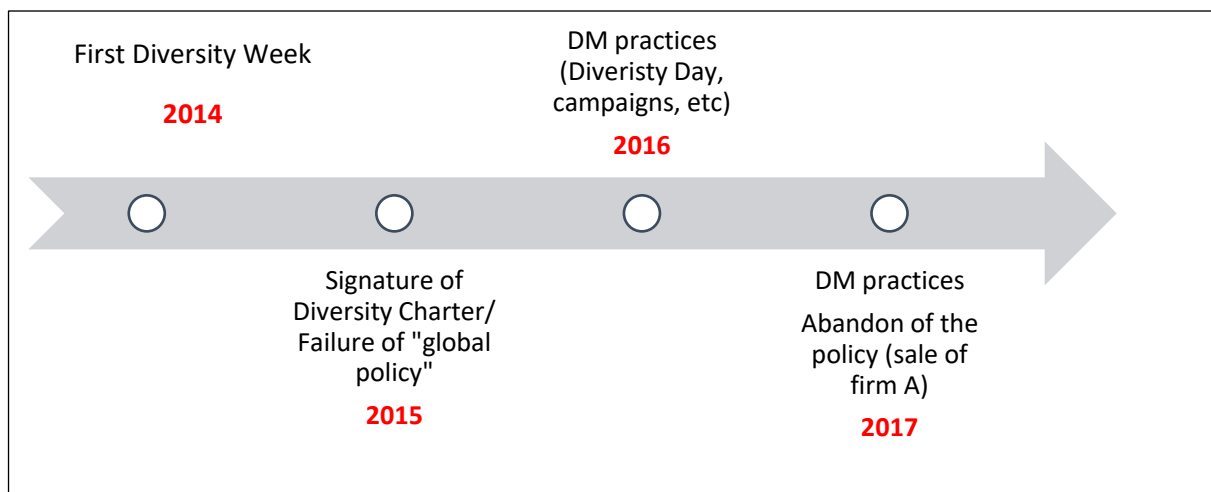


Figure 39 Timeline of DM transfer in firm A, Source: own

The internal documentation provides evidence of the first Diversity Week in 2014. The year 2015 was marked by the abandon of the new project of the global D&I (Diversity and Inclusion) policy which was met with backlash from the subsidiaries and was accompanied by the victory of the anti-immigration and diversity-sceptic party "Law and Order" ("PiS"). The turning point which has put an end to the Polish agreement on diversity was the sale of the firm to a public state-owned gas and energy company, validating the hypothesis that the international headquarters were the main drivers for the policy adoption in Poland.

During the research, the Polish team structure has changed several times. In 2015, the HR Director was the "Ambassador" of Diversity policy and was supported by an HR assistant who later became the leader of the women's network in Poland. One year later, the HR Director left the company and was replaced by the Compliance Director, Compliance Manager, and Compliance and Ethics specialist. For example, the Compliance Manager responsible for DM had no HR or diversity-related experience and had previously worked in the R&D department. Conversely to the Headquarters, the Polish team was not trained to work specifically in the field of DM. The budget of the subsidiary was dedicated to the organization of Diversity Days and Diversity Week (for instance, the organization of a barbecue for employees and their families in 2015 during Diversity Day).



### Diversity Week 2014

The Diversity Week organized in May in 2014 called “Women and men with diversity” illustrates a narrow understanding of DM, as the focus of Diversity Week shifted towards the topic of employee health. For instance, the employees participated in the workshops entitled “How to prepare for marathons” organized with speakers from medical, sport and cultural sectors. The employees had an opportunity to measure tension or complete medical checks (e.g. breast screening). In addition, the company’s magazine (2014) published a photo of the cake made on Diversity Day.

### Failure of the global policy: 2015

In 2015, the French headquarters attempted to establish a new global Diversity and Inclusion policy. The projects’ methodology was the following: Interview HR Directors in each subsidiary ; organize a D&I international seminar to provide feedback from the interviews; Brainstorm with D&I managers; Evaluation of common group assignments; Benchmark and Social ratings. The primary purpose was to provide consistency in all the subsidies and to “guarantee all processes without discrimination; Create inclusive environments; Value all strands of diversity; Establish local action plans including talent attraction and recruitment of diverse workforce” (Internship report, 2015). The policy project was suspended due to the subsidies’ reluctance towards the diversity audits and the idea of recruiting a diverse workforce based on all strands of diversity.

### DM practices 2015-2017

After the suspension of the policy project, a local Polish campaign from 2015 used surprising metaphors such as “Diversity of Fruits” (Figure 40) to talk about DM. In the first part of the poster (illustration on the left) is an example of a fruit shake recipe, while the second poster highlights cooperation and good relations within the teams<sup>30</sup>. The second poster is entitled “*Try diversity to build a successful team*” and talks about universal communication principles: “*Respect others*”; “*Do not judge others*”; “*Get to know yourself*”; “*Watch your words*”; “*Listen and ask for explanations.*” The following document was displayed on a table in one of the

meeting rooms in the shared services centre (and was used by employees to take notes or do calculations).



Figure 40 Local campaign for Diversity Week, entitled: “Try diversity, add fruits to your diet” and “Try diversity and create a successful team,” 2015

The previous diversity correspondent in firm A (the assistant of HR director) published an article in an internal company magazine about the Diversity Week in 2015 and precisely the above-mentioned “Fruit campaign,” arguing the following:

*“In order to inspire Polish employees and trigger interest in the topics on diversity, we have distributed in each localization fruits and a brochure with recipes of fruit cocktails, and information on how to build good relationships at work. We have also displayed the posters with four working styles. In the intranet, we have developed a survey allowing to identify the individual working style”.*

Company magazine (confidential), Translated from Polish, 2016

A compliance manager responsible for diversity in 2015 made available the internal documents around diversity management, folder entitled “Diversity in (Company name).” But surprisingly the individual documents had titles like “safety policy for external contractors”; “Healthy

company” (brochure about the impact of the consumption of sugar on health); “Healthy week poster” and the poster of a production worker.<sup>31</sup>

During Diversity Week 2016 the campaign was a presentation entitled “Diverse and unique”. The emphasis was put on neutral practices such as the motivation tests, personality tests as well as learning tests aiming to provide insights into whether the employees are left or right-brained. Although the logo of “Diversity & Inclusion” was borrowed from the headquarters’ documents, it does not have a special translation in Polish and therefore remained in French or English.

In the following year, the subsidiary displayed the “Educational posters” about diversity of behaviours and working styles (creative style; balanced style; analytical style and executive style). The posters promote the neutral idea of diversity according to which the diversity of behaviours and work styles can enhance people’s and the team’s performance. However, interviews suggest that Polish employees do not perceive the correlation between diversity and team performance. Also, the idea of combining a diversity message with a safety message<sup>32</sup> was proposed at one time but was not implemented. Furthermore, some workshops were dedicated to the employees and their families (for example art workshops, food workshops or health checkpoints), but it was doubtful that the parental guide could be a valuable initiative to advancing DM agenda.

## Rejection of the headquarters’ practices

### The D&I dashboard

In 2015, the French HQ attempted to deploy the D&I dashboard (See Appendix) and foster the implementation of the DM principles in the Polish subsidiary , but with no success. The

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<sup>31</sup> With the purpose of confidentiality, we have modified the content of the original documents, which may include sensitive information about the company.

<sup>32</sup> In firm A in Poland, most meetings start with a so-called ‘safety message’ which consists of sharing a message or an example of safety practice with other colleagues, aiming to promote the culture of “safety” in the company. Some of the topics of safety message are: “anti-stress message: leave your house in a state that you would like it to see when you come back from travel”, “Compliance pillar: Never give your work ID to your colleague”, “Do you know if the bus you will take is safe?” (Internal documents, 2016).

dashboard was established in 2015 and was the primary tool of the headquarters to measure the global progress in DM in all the subsidiaries. The dashboard aligned with the French ideals of diversity, emphasizing diversity in recruitment, equal opportunities, non-discrimination and wanted to promote these values outside the company. The pillars of the Dashboard were the following: (1) KPI's; (2) Open commitment to equality, diversity, and inclusion; (3) Recruitment and employee trust; (4) Organizational culture Inclusion and (5) External promotion and communication about equality, diversity, and inclusion. Independently from the D&I policy, The Polish subsidiary established the "Harassment and non-discrimination policy" which in Poland is defined as "Ethics and compliance policy" and the "Anti-mobbing" policy (Global compact, 2015) aligned with the Polish legislation. The "Anti-mobbing" policy is defined in the following way:

*"Our organization has many documents that allow to conduct risk analysis, strengthen supervision and control current work, and prevent possible irregularities. The implementation of these activities is based on the commitment and responsibility of our employees who know best how to keep improving their work. The policy allows to set out rules to prevent discrimination, harassment, and mobbing. The Regulations also contain instructions on how the employees can formally report discrimination, mobbing or harassment in the workplace".*

(Internal interview with compliance manager and HR Director", 2016)

For example, the fourth pillar is entitled: "Organizational culture and inclusion" and translates to initiatives such as "Employee surveys, Employee support, Employee engagement, Employee wellbeing, and Talent management". Considering these categories separately and independently from the D&I policy, the Polish subsidiary has implemented the practices such as talent management or global surveys on employee satisfaction and attempted to promote the values of the organizational culture locally, but without a clear alignment with DM practices.

The fifth pillar, "External promotion of Equality, Diversity, and Inclusion" was used with the intention to increase diversity among suppliers and contractors to improve client satisfaction and employer branding and foster social engagement. There is no evidence of external DM initiatives embedded in the "Ethics and Compliance strategy." The suppliers of firm A are mostly from the domestic market and of Polish nationality, with a few exceptions (e.g. the

presence of contractors from Ukraine and the Czech Republic for few weeks in the plant in Cracow).

Finally, the dashboard draws on the Group commitment to non-discrimination, especially in the recruitment and equal opportunity policy which does not exist in the Polish subsidiary . Also, the promotion of inclusion and all strands of diversity lacked support in Poland.

### The anti-stereotype campaign – 2015

The anti-stereotypes and non-discrimination campaign (2015)<sup>33</sup> supports the idea of “rejection” of the non-discrimination discourse in the Polish organizational context and the rejection of the French ideals of organizational reality, where immigrants, people of color, people of different sexual orientation (explicitly gays, lesbian and transgender people), people of different beliefs and religions, age and gender must not be discriminated, and most importantly can openly manifest themselves and their differences. The principle of “valuing all strands of diversity” seemed to be problematic in the Polish subsidiary of firm A, as it allowed for a broad interpretation beyond locally accepted, “neutral” aspects of diversity.

The Polish version of the campaign focuses on gender, age, disability and parenting (Figure 41). The corporate video was rejected, and the diversity dimensions were reduced to four dimensions, ignoring religion, nationality, and sexual orientation. Furthermore, the Polish team modified the nondiscrimination and equal opportunity note and highlighted an open attitude instead of diversity: *“Openness for diversity makes better collaboration at work”* (English version). The alleged openness to diversity refers to a diversity of skills, motivations and personalities. Furthermore, compliance and ethics managers deployed the anti-stereotypes communication campaign only in the administration building and not in the building dedicated to the administration of the production plant.

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<sup>33</sup> It should be noted that during the internship in the headquarters, I co-created, with the D&I manager, the French version of the campaign and I presented it to the D&I team in Paris.



Figure 41 French anti-stereotypes campaign (left) and Polish version of the campaign (right), 2015

The anti-stereotypes campaign avoids the topic of non-discrimination and focuses instead on raising awareness of the issues of stereotyping and calls for greater openness to diversity of gender, age, and disability. What is interesting is that the campaign is deprived of the dimensions that are part of a sensitive political debate, the idea of a diversity of nationalities, in a culturally heterogeneous work environment that is an essential factor of discrimination mainly in Poland, as it is explained in the chapter on the Polish context.

### 2017 Abandon of the policy

The second part of the empirical investigation in firm A dates to June 2017, a month before the official sale of the Polish subsidiary to a state-owned, public gas and energy company. The interviews were conducted in different circumstances in 2015. The interviewed employees expressed their fears about the future employment as well as the future of the diversity policy. However, due to a large amount of data, these interviews are not illustrated in this part of the findings.

The new company that bought the firm A's Polish subsidiary is controlled by the Polish State Treasury, which owns almost 60% of the company's shares. The company was founded in 1990 and is Poland's largest energy company. The abandonment of the policy, shortly after the change of the ownership, shows that the influence of the French headquarters was a critical condition to establish and preserve the organizational commitment to diversity.

Drawing on an informal conversation with a Compliance specialist as well as Compliance Manager in 2018, it was found that the diversity and inclusion policy was abandoned shortly after the sale of the company. Since the sale process came into effect, the new employer ordered to communicate exclusively in Polish and to translate all data from English and French to Polish. In addition to this, the Polish members replaced the French Executive Directors. The Compliance specialist left the company, while the compliance manager in charge of diversity project moved to the R&D department.

In 2016 the Public company published a statement entitled "Diversity policy", arguing that:  
*"(Company's name) has not established a diversity policy so far concerning the Management Board or the key managers. The recruitment process for the management positions is solely based on the appropriate education, work experience, qualifications, and skills of the candidates. The company does not disqualify other candidates based on other dimensions".*  
(Company's website, 2016)

The statement sheds light on the policy concerning the management and executive management levels. In 2018, on the company website, was published an endorsement for principles of justice, equality, and diversity translated into employee integration practices such as: "Turn on the electricity" offering the opportunity to visit the plant and "get a better understanding of the Group" (website, 2018), again with no clear connection to DM strategy.

### 5.3. Case studies: Firms B, C, D

#### DM policies and practices

##### Firm B

The interest in diversity emerged in firm B in 2006 and laid the basis for the diversity policy in Poland. Initially, the policy focused on people with disabilities, as the company hired a few employees with disabilities for part-time positions during the events in the national stadium in

Warsaw. This was the first time when the Polish subsidiary approached the term of diversity in practice (Interview, HR D&I Manager, 2017).

The influence of the French headquarters was the key factor in the emergence of the commitment to diversity in Poland, extending the policy to other areas in addition to disability. Firm B in Poland has agreed to implement the Diversity Charter, CSR agreement, and the Human rights policy<sup>34</sup>, which all include engagement with diversity-related issues and non-discrimination. For instance, here is a fragment of the Polish version of the Human Rights policy based on the premise that the commitment to promote the so-called “cultural diversity” is framed to:

*“Create an international and open environment in which Polish employees can work with colleagues from other subsidies and other cultures and participate in international projects”* (Human Rights policy, firm B).

The positive outcomes of such diversity management are recognized through knowledge share and international projects, rather than recruitment and equal opportunity related issues. The policy indicates that the company promotes the “spirit of openness” as well as “diversity of cultures and talents through the exchange of experiences, development of know-how within the interdisciplinary groups and international project teams”.

(Human Rights Policy, Poland, 2018).

The reference report (2017) argues that the contractors and suppliers of firm B in Poland should: *“ensure and document at least every year that the company can better present the results of diversity and integration in its business activity [...] The suppliers should make an effort to present practices and measures which will prove a diversity of the workforce and integration.”*

(Firm B in Poland, 2017).

| Scope of the documents                | Documents implemented                                      |
|---------------------------------------|------------------------------------------------------------|
| Global and Local (Common with the HQ) | Diversity Charter<br>CSR Commitment<br>Human rights policy |
| Local                                 | Diversity and Integration policy                           |

Figure 42 Implemented documents in firm B, 2018

<sup>34</sup> The Polish version of the policy states that the company seeks to find the best people for the positions and appreciate and promote diversity among its employees.



The global diversity and inclusion (D&I) policy elaborated by the French headquarters has existed in Poland since 2006, but it is labelled as the “Diversity and Integration policy”<sup>35</sup> (In Polish: “Polityka różnorodności i integracji”) and is based on four pillars: gender equality, age management, ethnical minorities, and people with disabilities. It is interesting to note that the global version refers to the term ethnical minorities, which is not commonly used in the Polish versions of the documents. The “Diversity and Integration” policy is underpinned by the idea of openness and friendliness to both diversity and alterity (Polish: “odmiennosc”). The term “regardless of” is a joint statement in diversity policies in the US and western organizations, but the same statement can be problematic in the context of a culturally homogeneous workplace.

The policy states:

*“The most valuable asset of our company is the people employed in it. Therefore, we strive to make the workplace friendly, open to diversity and alterity<sup>36</sup> because it enables us to continue to develop and be successful”.*

(Company’s website, 2018, Translated from Polish)

In an interview (2018), B&R services Director of Polish nationality commented on the newly published report about the evolution of the Polish employees’ attitudes on the national labour market. The four model profiles of employees prevail in Poland.<sup>37</sup> He stated the following:

*“We are witnessing a revolution in human capital management, which requires companies to manage the potential of diverse teams to an unprecedented scale. This report perfectly reflects this diversity - of attitudes, goals, ambitions, motivators, and expectations. It is a challenge to use this diversity - that is, to make full use of the potential that lies within us and to create a positive work environment understood as employee experience”*

(Director of B&R Services, web, Translated from Polish, 2018)

This statement suggests the shift of interest from the definition of diversity around the primary dimensions to a definition which englobes the term of human capital and the neutral idea of the diversity of thoughts, skills and employee ambitions is particularly relevant and desired.

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<sup>35</sup> Data from the interviews suggests that the term of “inclusion” borrowed from the HQ is impossible to translate to Polish and therefore the term of integration illustrates better the idea of integration within the local community.

<sup>36</sup> Data from the interviews suggests that the term of “alterity” is rather an ambiguous concept and the employees in HR department consider that alterity may have a negative connotation and refer for instance to sexual orientation or other dimensions that are not comfortable to talk about (Communication specialist, 2017).

<sup>37</sup> According to the report, there are four profiles of Polish employees “A distanced professional”; nimble professional; Safe traditionalist; and practical initiator.

## Firm C

The idea of the local diversity policy development emerged in 2017, emanating from the Country Director of German nationality, who strived to make the project of the policy one of the main priorities of the Polish HR team<sup>38</sup>. Despite the corporate commitment to Diversity and Inclusion globally, there was no written diversity policy, besides the global statement on promoting diversity on the Polish company's website and the internal presentation (2017). The country HR Director confirmed in 2018 an interest in diversity management in firm C in Poland. Despite the absence of formalized guidelines, many interviewees referred to the topic as there was a dedicated policy, but there was no single document labelled as the diversity policy. It was difficult for interviewees to provide examples of management practices around the topic of diversity, which would reflect the commitment to the global policy.

Drawing on the data from the company's website and external documents, the term "diversity" is inscribed in the principle of trust, as the company affirms to "*develop diversity and engage people*" as well as "*promote diversity among employees.*" This data from the company's website is limited and does not allow to capture the true meaning of the statement.

To compensate, additional internal documents were used. The confidential project of diversity policy is locally called "Winning the talent war. Challenge accepted" (PowerPoint, 2018)<sup>39</sup>. Drawing on the first draft of the project, it seems that the first step entails a possible "agreement scenario" on a group assignment, team rules, next steps and most importantly agreement on outputs of the policy. The first phase of the project is defined as following:

1. *Identify the key factors to external attraction of diverse talents... What are they looking for and what we are offering?*
2. *Identify the current internal tools and processes as enablers of diversity in the talent pools.*
3. *Interview focus groups of talents/key employees to identify the largest barriers for diversity in the talent pool – what are the largest stoppers in the attraction and retention of diverse talents.*

Figure 43 Extract from the project of the policy, 2018.

<sup>38</sup> I use the term "Polish team" for two reasons. First, this section applies to the context of the Polish subsidiaries. Second, the local team is composed only of the members of the Polish nationality.

<sup>39</sup> The presentation ppt is strictly confidential and cannot be included in the present document.

The policy project is an initiative of the German Country Director who gave the responsibility for the project to the local HR Director in order to align the local objectives with the international policy. This can explain the attempts to include the recruitment and talent attraction in the Polish subsidiary, which are the areas of focus of the German global policy at the headquarters level. In June 2018, the Polish HR Director stated that *“unfortunately, the subject of diversity (a reference to a new project linked to D&I policy) is still at its embryonal stage and is still neglected at the local level.”*

The empirical investigation did not allow to obtain more information about the progress of the new “diversity project” and it is not possible to confirm whether the project has been successfully implemented or not.

#### Firm D

The headquarters of firm D, based in the UK, transferred the global policy to the Polish subsidiary. The Polish site adopted the initial versions of all the global policies, including the diversity policy. According to the HR Director though, access to the actual documents was restricted because of the confidentiality of the data.

The Regional HR Services Lead for EMEA was asked about the content of the global diversity policy and the anti-discrimination policy, but the interviewee could not provide written evidence of the policy due to the need for anonymity. The next day, the interviewee seemed to have discovered this policy for the first time, saying that *“There is something like that (referring to the anti-discrimination policy), however, it is not a procedure that would impose how we should promote diversity, but it is an important global policy”*. (HR Services Lead for EMEA, 2017). This highlights the lack of knowledge and the indifferent attitude towards the corporate engagement in the area of diversity and non-discrimination, a trend which has been identified in all the four case studies.

The following fragment of an interview with the Regional HR Services Lead for EMEA suggests the absence of the written diversity policy at the Polish site in Warsaw:

*“Paradoxically, maybe we do not need the formalized policy guidelines, because these are soft aspects of management, and we are working on raising awareness and creating awareness and culture which represents values of the company of openness to diversity and respect for others and diversity in general, [...] We have forged this attitude in rather than formalized it on a piece of paper”*.

Regional HR Services Lead for EMEA explained the reason why the company stands for diversity in Poland and does not need a locally adapted diversity policy, arguing that: *“Somehow diversity reflects the vision and the mission of our company and Poland is also progressing towards this kind of international mindset”*.

The external commitment to diversity states the following:

*“Firm D in Poland counts on diversity and talent attraction from various parts of the world, that is why we are open to candidates from different markets. Currently, we have around 30 different nationalities, including people from Belarus, Russia, Romania, Spain or India”*.

(Firm D in Poland, website, translated from Polish)

Finally, Firm D is the only case study having a commitment to diversity<sup>40</sup> included in the online equal opportunity note in the role’s descriptions.

*“Firm D (company’s name) is an equal opportunity employer. Firm D (company’s name) will consider all qualified applicants for employment without discrimination on grounds of disability, gender or sexual orientation, pregnancy or maternity leave status, race or national or ethnic origin, age, religion or belief, gender identity, marital or civil partnership status, protected veteran status (if applicable) or any other characteristic protected by law”*.

Figure 44 The non-discrimination notes in the description of the positions, 2017

#### 5.4. Convergences and divergences between case studies

What are the divergences between the case studies?

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<sup>40</sup> It should be noted that the “diversity statement” is being borrowed from the headquarters and the note added to the Polish job descriptions remains the same as the original version. Yet, only the job descriptions in English include the “non-discrimination closure”, while few exceptional job descriptions in Polish do not include the non-discrimination note.

The divergences between case studies are highlighted through three key factors, which might foster or impede the local interpretation and play a vital role in the DM transfer: Sector, Age and Knowledge Transfer (KT).

On one hand, these features are important for the research problem, attempting to explain why the Anglo-Saxon model of DM historically focused on non-discrimination and recruitment does not imprint on the Polish subsidies. To what extent may the organizational context of the Polish subsidies foster or impede the international transfer of DM? (Research question 1)

On the other hand, the interplay between the deeper layer of the concept of “Polishness” and the Polish diversity operations can explain the convergences between the case studies based on the same national area. This brings us to the second research question: How does the national context of the recipient country shape the DM policies and practices? (Research Question 2).

The organizational and national layers of analysis illustrate the relational interdependence (Syed & Özbilgin, 2009). The section is structured around the main case study of the production firm (firm A), compared to other cases (firms B, C, D).

### Sector

Firm A is part of the Secondary Sector<sup>41</sup> as it is producing heat and electricity and manages operations. Firms B and C are part of the service or Tertiary Sector<sup>42</sup> as they provide services to business and individual clients. Firm D is a biopharmaceutical firm with the primary function of R&D and innovation, and part of the Quaternary Sector<sup>43</sup> of the economy.

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<sup>41</sup>The secondary sector of the economy produces finished goods from the raw materials extracted by the primary economy. Activities associated with the secondary sector include metalworking and smelting, automobile production, textile production, the chemical and engineering industries, aerospace manufacturing, energy utilities, breweries and bottlers, construction, and shipbuilding (insee.fr, 2019).

<sup>42</sup>The secondary sector of the economy includes industries that produce a finished, usable product or are involved in construction. (insee.fr, 2019).

<sup>43</sup> The quaternary sector of any city is a way to describe a knowledge-based[1] part of the economy, which typically includes knowledge-oriented economic sectors such as information technology, media, research and development; information-based services such as information-generation and information-sharing; and knowledge-based services such as consultation, education, financial planning, blogging, and designing.[2]. (Peter Busch, 1967).

To what extent can the sector limit the adoption of the DM model in the Polish subsidies?

The Polish subsidiary of firm A is committed to operational performance while minimizing the risks of accidents in the power plant (web, 2015) and ensuring the highest standards of safety and respect for the procedures. The local managers refer to the sense of durable employee duty and the prevailing principle of pragmatism at the power plant level that is critical to preserving employee safety and organizational security. The promotion of the organizational “culture of safety” is seen as incompatible with the DM concept of inclusion and the team focuses on the improvement of existing processes rather than the uncertain and unproven innovative initiatives. The system failure could have severe consequences for the electricity and heat supply of entire communities. For this reason, the pursuit of a diverse and inclusive workplace seems unimportant at the power plant level<sup>44</sup>.

A compliance manager, when asked about creating an inclusive environment where employees can express themselves and be encouraged to innovate, stated that:

*“I can imagine departments in the organization where it could be implemented [the diversity policy] but here [production site] it is not possible to let employees express themselves freely, to work without limits because it is not a typically creative environment where creating an inclusive environment could indeed impact employee results. I don’t see a possibility for freedom at the production site. There are strict rules and procedures. As an employer, we do not expect a free invention or innovation. We only give the employees a chance to improve a few production processes. Introducing freedom, happiness, and creativity could lead to the industrial disaster”.*

(Compliance Manager, Firm A, 2016)

The interviewee believed that inclusion, as defined by the headquarters, could impede the safety in the workplace, and hinder employee communication in the production site. For this reason, the local managers were primarily focused on preventing communication problems which are likely to appear in a culturally and linguistically diverse work environment. When

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<sup>44</sup> At the HQ’s, inclusion is defined as “a proactive approach designed to enrich oneself by the differences within an environment and to create a work environment of respect of these differences. Promoting inclusion means offering everyone the opportunity to develop their individual potential in the service of the company’s collective project”. (Headquarters document, Source: Internal data, 2015).

asked, “How would you feel if there were more people of different cultures in the company?”, the compliance manager replied:

*“Fantastic, amazing really, but I cannot imagine this kind of tower of Babel at the production plant where people need to communicate” (...) I cannot imagine it in the workplace where you have 2 Polish engineers and 15 foreign technicians working all together”.*

(Compliance manager, firm A, 2017)

For the compliance manager, the DM lacked relevance, especially for the employees directly involved in the process of energy production and operations. The Management Quality Director recommended addressing the questionnaire to the compliance department and preferred to discuss other areas of expertise such as Quality management. Also, a mechanical engineer mentioned the lack of time and often looked at his phone or checked the window during the interview.

Some employees mentioned that the energy sector is of paramount importance for national economic interests and national security. For example, in the context of the sale of the company’s assets, the conservative government (Law and Justice) blocked the choice of a new foreign company, providing the privilege to the state-owned company. It was considered as a means to regain a monopolistic market and cease dependence on foreign resources.

After the sale, the diversity policy became highly contested and consequently rejected. The government played an essential role in distributing an anti-immigration message to different stakeholders and communities, as it is concentrated on the preservation of the political structures.

#### Sectors firms B, C, D

The service company B especially serves Polish clients (e.g. the Parliament and the national stadium in Warsaw). The Polish national clientele is seen as an important limitation to adopt the classical DM objectives.

The insurance service company (firm C) offers financial products in majority to Polish individual clients located in urban and rural areas. For this reason, activities that are part of DM such as targeted recruitment focused on cultural diversity or other primary dimensions are not

genuinely desired due to a predominantly native workforce and clientele. The prevention of prejudice and countering the potential risk of discrimination and unequal treatment is viewed as a superficial concept at a practice level.

Further, at the organizational structure level, in terms of the significant functional departments employing the majority of staff, the core department in firm C is Finances and requires from its employees a deep understanding of the Polish financial laws and regulations, which is often attributed to Polish speaking candidates (Finance Director, 2017). This makes international talent attraction an inadequate strategy to fill up the shortage of skills. The second crucial function is the sales strategy at the regional level, focused on creating new branches in the urban areas as well as in the province.

DM is considered as an integral part of firm D's activity related to "internationalization of innovation", leading to medical breakthroughs. It is argued that *"Diversity is usually part of the process of innovation, which in this organization is huge"* (Recruiter, Russian, 2017). Employees of foreign and Polish origins often recognized the diversity management agenda as an inherent part of the organizational identity focused on innovation, as it happened in the company *"in a natural way"* (HR Lead for EMEA, 2017) rather than being a result of a formalized policy. This means that the innovation unit has not adopted the headquarters' diversity strategy in its original way, based on targets and measuring progress, but has its DM managerial philosophy.

Conversely to firm B, foreign employees in the innovation hub are often responsible for their national markets (for example India, Latin America, etc), therefore do not have to know the Polish regulations. The procurement specialist (Mexico, firm D) stated the following: *I know nothing about the market in Poland, so in my team, I think it is the same because I work for Latin America, and my colleagues they work with UK or Egypt... there are lots of countries"*.

The four companies, and especially the energy production in the secondary sector, have significant limitations to the local endorsement of headquarters' values of cultural DM traditionally incorporated in HRM<sup>45</sup>. While the production environment seems to be a significant blocker, DM can have a more natural habitat in services and especially in the biopharmaceutical innovation firm, but in a new form that will be discussed further. Despite

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<sup>45</sup> The thesis argues that the principles of DM are not part of HRM agenda (recruitment, promotions) and non-discrimination discourse and equal opportunities in the cases under study. However, in order to respect the length of the findings, the chapter does not provide the verbatims demonstrating the ignorance of DM specifically in HRM.



the shortage of candidates and recruitment needs in Poland, the attraction of candidates with other nationalities is considered as inappropriate and can be partially explained by the local embeddedness of the organizational activity (e.g. Polish clientele, regional presence in firms B, C) and the particular features, such as the “culture of safety” in firm A. For example, the Polish subsidiary of firm A ignored DM in HRM and in its internal communication. Moreover, firm A is the single case study lacking external communication practices related to non-discrimination and diversity through their website.

The organizational factors are not limited, though, to the sector and should also take into account the knowledge transfer and the generational divergences.

#### Age (Generational gap)

The main question for the Age dimension is: which age group is dominant in the company at which levels of management and how does this contribute to the impediment of the headquarters’ DM practices in the local reinterpretation? In order to avoid generalized findings, the following section should take into account the interrelatedness of the differentiators between the age groups: international travel within the organizational context, seniority level in social headquarters vs regional offices, education (national vs. international), attachment to traditions (conservative, catholic), language (only Polish speakers vs two or three language speakers).

There is a considerable disparity in terms of employee age between the energy production company and the three other case studies. As mentioned in the first section, the majority in firm A represents Polish people from generation X (from 40 to 55+ years old) especially at low levels of management such as the production plant. The senior workers have significant work experience in relatively old, public-sector firms, while most had spent their career in firm A and “have not had the opportunity to work with other nationalities except the French Directors” (Compliance manager, 2017). According to the Compliance manager, a member of generation Y, (2017), the notion of diversity is still “*something new and exotic*” for the generations of our parents, which for the most part did not have the opportunity to travel for work two decades ago. The privatization process of state-owned firms started in 1990 (Uhlenbruck & De Castro, 2000) and was followed by the rise of foreign investment in Poland and the internationalization

of education in 2004. In firm A there is a robust collective memory among the members of the previous generations concerning the organizational past before the French privatization and the employment hazards under communism (Compliance manager, 2017). Most production workers only speak Polish and received their education in Poland before 1989 when Russian was mandatory in Polish schools, a result of the cold war.<sup>46</sup> The majority of senior employees in firm A (50+) do not speak English except for the Executive Managers.

IT manager (2017) explained that:

*“Why would people at the production care about diversity day? They have been working in the same company with the same people such as Mr. Wladek, Mr. Stanislas, whom they have known for 30 years, so what could be a possible value of diversity for them? For them, a significant diversity occurred if they had diverse types of tea in the canteen. This is what they care about”.*

(IT manager, firm A)

According to a controlling specialist (firm A), the attachment to the national, catholic traditions of Generation X is likely to impede the corporate attempt to incorporate the global DM in the Polish organizational structure, arguing that: *“(Company name) can try to implement something new, but it will be difficult to accept it until the older generation will be a minority. So, I accept the DM practices of firm A as they are and I think that they are fine following the national market, traditions and the Polish mindset”.*

The average age in firm D is 30 years<sup>47</sup> and 35-40 years in firms B and C. Employees aged 50 plus are the least numerous groups in the three case studies. The generations Y and Z are more likely to see the added business value and to enjoy the advantages of globalization and resulting diversity management, for instance, using English as the corporate language. For example, the clinical trials manager (Polish) stated that: *“for sure the so-called young generation is more open and courageous. Well, you can say so, that is how they can see a great opportunity, in this globalization and they are happy that they can work with people from other countries and speak English.”* Although firm D employs mostly a young workforce, it does not imply a smooth transfer from the headquarters to the Polish unit. This means that the DM

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<sup>46</sup> The majority of production workers do not have higher education, as the access to higher education and the possibility to travel was limited in the past.

<sup>47</sup> This information is confirmed in the interviews.

practices are likely to be adopted (in the Polish way) in firms with a dominant positive employee perception of the concept of diversity, characterizing younger generations.

The majority of production workers do not speak any other language than Polish, whereas members of generation X in firm C (for example in Finance) encounter multiple challenges due to the rapid insertion in the English speaking work environment, which emerged only recently (Audit Director responsible for the Polish market, gen X, firm C).

The generational gap between the production company and other case studies might explain the rejection of the headquarters' campaigns in firm A, which according to the Polish managers might trigger negative feelings among certain groups of employees. This also might explain why the local anti-stereotype campaign has not been displayed in the production administration building. This raises an important question on the interrelatedness between a certain age group and local interpretation of the headquarters' initiatives at the national and regional levels. While the French headquarters' campaign was met with resistance and thus has not been disseminated in a local plant in Cracow, two international campaigns were displayed in the social headquarters in firms B and C in Warsaw and remained untouched<sup>48</sup>. The interplay between geographical dispersion of local units with an important number of senior employees and a higher risk of a negative reception and rejection of DM campaigns was identified also in firms B and C.

In firm B, the generational gap between the regional offices and the Warsaw office might explain why individual global diversity campaigns have been displayed only in the social headquarters in Warsaw. For example, the controlling specialist (firm B) stated that most employees in the Polish headquarters are *"young and have seen the external world through traveling"* (2017), but the global diversity video would likely be considered as *"a complete abstraction"* in the rural offices dominated by generation X, for example in the city of Radom. The corporate diversity documents (firms A, B, C, D) mention the Anglo-Saxon term of *"inclusion"*, but it is a rather unknown and unclear term in the Polish language. To solve this dilemma, the Polish subsidiary of firm A has used the English version of *"Diversity and inclusion"* for attracting native Polish candidates. Firm B has replaced the term *"inclusion"* by

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<sup>48</sup> Example of firm B's corporate diversity video displayed at the reception and the diversity campaign in firm C displayed in the room where I conducted interviews.

“integration” which is often associated with employee integration regardless of aspects of diversity.

One of the most relevant insights in this section is the perception of the generational gap between the regional offices and the Polish headquarters. Data suggests that the proportion of the workforce (generation Y and Z) is higher in the social headquarters (firms B, C, D) located in Warsaw than in the regional units, where DM practices are avoided. This can be explained by a tendency to recruit generations of workers (gen. Y and Z) with international experience and knowledge of foreign languages at Polish headquarters.

### Knowledge transfer

The knowledge and skills transfer between subsidiaries and headquarters is not a new phenomenon, therefore it is particularly interesting to study DM transfer in the Polish subsidiaries, to understand the adoption of DM in Poland.

In all four companies, the share of knowledge and skills in the Polish subsidiaries does not pass through the attraction of diverse skills nor recruitment of international workforce, but through the inter-organizational interactions. This section considers two types of transfers which occurred in the four case studies: a) transfer at the international level (from the headquarters to the Polish subsidiaries) and b) at the national level (from the social headquarters to the regional units); taking into account three dimensions: a) the international dimension of the interactions with the headquarters, b) volume of the interactions and c) the levels of management where it occurs.

In firm A, the primary purpose of the exchanges between the Polish subsidiary and the French DM team that occurred on a monthly basis between 2015 and 2017 (calls and videoconferences) was to align the local action plans with the global policies and to share the best practices within the Group. However, despite regular communication, the outcome of the best practices transfer was unsatisfactory for the French Diversity team willing to unify the initiatives while the Polish department was focused with the advancement of its own agenda. At the regional level, the Polish “Diversity Ethics and Compliance Strategy” were disseminated

only in the power plant in Cracow, ignoring other power stations in Poland<sup>49</sup>, therefore, the learning process and the transfer of information within the regional units was not realized.

The participation in international projects and conferences that require traveling at the subsidiary -level in firm A occurred mainly at the Executive Management and Management levels. Senior production workers transferred their technical skills and industry knowledge locally through interactions only with interns or new hires of Polish nationality. According to the compliance manager (2017), the international communication and therefore the learning and the transfer of knowledge is accumulated solely at senior levels of management, therefore it does not serve the interests of the operational staff in production. (Compliance manager, 2017).

In firm D, the international exchange of knowledge, skills, and experiences occurred at all levels of seniority across various departments and age groups, from Directors to interns. For example, the R&D department applies a model of “open innovation” consisting of a cross-country/company idea sharing between academia and industry and specifically between the global teams of R&D Centres<sup>50</sup>. According to them, the interactions with the headquarters in the UK happened daily, as many Polish employees work closely with their first-line managers based in London. At one moment, a few teams from the headquarters came to Poland to get a deep dive into the functioning of the business in Poland, for example, the organizational laws implementation of maternity leave. In the field of DM, the Polish structure remained highly autonomous, as there was little interference from headquarters to change the structure in terms of cultural diversity or to inspect the local reporting.

Investigating the Polish subsidiary of the German corporation (firm C), the interview followed by the e-mail exchange with the HR Director in 2017 suggests the infancy stage of the subsidiary -headquarters cooperation regarding the diversity policy, which was implemented in the social headquarters in Warsaw, but which required further development. The interactions occurred especially between the Polish Director and the Country CEO of German nationality, the leading proponent of introducing the diversity policy at a broader national

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<sup>49</sup> Data doesn't allow to indicate whether the local plants in Rybnik and other plants adopted their own version of Diversity strategy. However, there is evidence of multiple diversity events (diversity week, day) and campaigns in different locations, for example in Gdansk and Rybnik.

<sup>50</sup> Firm D does not have regional offices, so the local knowledge transfer does not take place.

level. The Polish HR Director disclosed that the project of the policy labelled as “Challenge accepted. Winning the Talent War” did not advance and was put on standby. The headquarters attempted to set up a more ambitious diversity priority but did not conduct the monitoring activities at the initial phase of development, therefore ignoring the national and regional variations in DM. The role of the headquarters is thought to be to impose financial solutions for the company in Poland (Audit Director, firm C), but the mandate does not apply to DM.

In firm B the international knowledge transfer occurred between the French headquarters and teams across various departments based in Warsaw but was absent in other parts of the company in Poland (e.g. restaurants of firm B). The HR manager was in regular contact with the headquarters on the topic of DM to give account for the Polish activity and to take recommendations from the French colleagues. The outcomes of this communication clearly show that the Polish subsidiary has a high level of independence to establish its agenda. Therefore, the transfer of diversity knowledge between Warsaw and other locations is very little or inexistent, also due to the outsourcing activity of firm B.

#### Convergences between the case studies

The four case studies have common points in relation to DM, even though they materialize differently within the organizational settings: the interference of the national identity (“Polishness”) and reducing the international character of diversity policies to the “Polocentric” undertone of the organizational diversity message and managerial strategy.

Despite the recruitment needs and the shortage of the national workforce, there is a tendency to preserve a culturally homogeneous dominant workforce and to ignore diversity in recruitment and talent attraction strategies. The attempt to preserve Polishness in the workplace is historically constructed and cannot be fully understood without considering the problematic concept of national identity. Contrary to the multiculturalist approach, the cultural dominance of a group can lead to the open ignorance or discrimination and exclusion problems of diverse employees in the name of the social cohesion within a group of natives.

The concept of “Polishness”, interlinked with the national identity (See Chapter Polish context) is seen through the lens of a Polish homogeneous work environment with the recruitment of

the Polish workforce in firm A; the perseverance of a dominant Polish work environment and presence of the national symbols present in local diversity campaigns (firm A).

On the contrary, the “Polishness” in firm D translates into linguistic and cultural proximity with employees from Eastern Europe. Despite the different nationalities in the Polish structure, (critical for the given business areas, e.g., international procurement), there is a shared assumption that the employees from Eastern Europe are a better match due to the cultural and linguistic proximity. For example, the acceptance and not the talent attraction of Eastern European workers in the pipeline (firms B, C, D) aiming to fill up the skills gap can be understood in terms of the common historical, cultural and linguistic heritage with the Eastern European region (Nowicki, 2002), the long-standing opposition to the Communist era and the share of the “Slave” culture and language (Nowicki, 2002).

In firm A, Polish employees strive to preserve their “Polish identity” in their relationships and integration, for example between Polish subordinate and French superiors in the power plant. The integration and establishment of trust were possible after the French Directors learned basic Polish and participated in an “informal” offsite meeting, trying traditional Polish food and beverages (IT manager, 2015).

Another example in firm A shows that the headquarters logo of “Diversity and Inclusion” was used occasionally during the “Students Talent fair” at one of the Polish technology universities in Cracow. The presentation entitled “Internships with diversity” (Polish: *Praktyki z roznorodnoscia*) highlighted the workshop entitled “chasseurs de diversité” (French) during which five groups of students, each marked by a specific colour, had to complete a logic exercise. Furthermore, the presentation was exclusively in Polish.

Another example of diversity practice which highlights the Polishness through the national symbols is a diversity campaign from 2014 illustrating the image of John Paul the Second, example already touched upon in the previous chapter. John-Paul II is recognized for his strong commitment to Christianity and is strongly associated with Poland and its dominant Catholic beliefs. Therefore, he is considered as the “national symbol” of the cultural heritage of the country. In Poland, it is believed that he contributed to the downfall of communism and encouraged Polish people to resist the communist government. Integration of the image of John Paul II may also signify the respect of a plurality of beliefs, cosmopolite sensibility, humanitarian values (Nowicki, 2006).

The Polish subsidiary of firm A was expected to align at minima with the corporate DM standards and reflect the openness towards others who are not necessarily Catholic nor familiar with the Polish culture, particularly people exposed to a higher risk of exclusion in a homogeneous society. Recalling the national symbols in the poster on Diversity Week might produce the opposite effects and therefore reinforce the feeling of a dominant Polish culture in the company. It could be received as discriminatory with regard to the few foreign employees of different nationalities or beliefs.

Finally, the reduction of the five dimensions (gender, age, disability, region, sexual orientation) to only three: gender, age, and disability in the anti-stereotypes campaign demonstrates the “Polocentric” character of the diversity message and practice. Also, a surprising finding is the shift from the non-discrimination discourse to the “open attitude towards diversity” message. One could assume that the unfavourable institutional framework contributes to the limited interpretation of diversity and the disregard of non-discrimination message. It seems that gender, age and disability are not seen as a “threat” to the perseverance of an ethnically homogeneous environment and therefore are present in the company regardless of the diversity policy.

For instance, the audit manager emphasized that: *“On one hand, we cannot implement superficially the diversity, but in sum, we are Polish people and somehow we want to defend our “Polishness” even though it is cool to connect with new cultures.”*

(Audit manager, firm A, date)

The “Polishness” is a converging factor present in all case studies, as we can see by looking at the firms B, C and D.

#### Firms B, C, D

It is important to note that ‘Polishness’, translated in the cultural homogeneous employee structure has also been expressed by a few Polish employees during interviewees in firms B and C and D.

The term “Our very Polish world” was mentioned in an interview with the HR Business Partner of firm C. This term may reflect the ambivalence of the feelings regarding the international



openness of the company and the willingness to preserve the dominant position of the majority, which in this case is represented by the Polish nationals.

*“I feel that the company is evolving towards a global one, the exchange of practices with other subsidiaries in all aspects of management is observable in particular at the executive level [...] but on the other hand, we have our very Polish world [...] I am not sure if the multinationalism is desired or required”*

(HR business partner, firm B)

In spite of considerable diversity of nationalities in firm D and particularly open attitude towards cultural diversity, it has been stated that the onboarding process is separate for Polish and foreign employees, as it is easier for the administrative staff to “communicate” and explain things to their compatriots. Also, the 4 % of foreigners in firm D is not a result of recruitment on the domestic market but of employee transfers for international assignments in Poland (for example two employees come from India and Mexico). In addition to this, firm D still has the majority (96%) of Polish native workers.

There are a few exceptions of employees from Eastern Europe (Latvia and Russia) in the HR department. The HR Leader for EMEA (2017) decided to hire Russian and Lithuanian recruiters, arguing that they have a better “*cultural fit*”, as they belong to the “*Slavonic*” culture which is *dominant in the company*”, therefore their integration with Polish employees was smooth and they were considered to be “*engaged, hard-working and honest*” people.

To better understand this point, the Polish chapter explains that in the 17<sup>th</sup> century the national identity was collective for the countries under the Polish-Lithuanian Commonwealth confederation, as Poland and Lithuanian were ruled as a single state. Despite the Polish dependence of the Soviet empire during WWII, both Polish and Russian are classified as East Slavic languages that are often compared to each other, as they have similar phonology, grammar and pronunciation.

In the first part of this chapter there was a drilldown of the cases by sector, age and KT, and several differences were spotted between the firms in their approach to DM. Nevertheless, the case studies converge on several points, linked to “Polishness” and local interpretation of the DM practices, that transverse sector, age and KT dimensions.

## 5.5. Conclusions

The findings are drawn on data from the interviews and the elements of the Polish context. They raise important questions about the motives for the rejection of the dominant model of DM<sup>51</sup> also adopted by the headquarters, leading to the Polish reinvention of DM. Organizational factors like sector, age gap and knowledge transfer cannot fully explain the unsatisfactory transfer of DM policies and practices, therefore, other factors should take into account the features of the national context. The literature on DM often criticizes the dominant model of DM for its ethnocentric character, while DM in Poland could be criticized for its limited and “Polocentric” character.

The findings raise a question about the universal character of the classical DM denomination which is often disseminated in its original language (English, French or German), which ignores the linguistics problems related to the local translation and cultural interpretation, as some terms such as “inclusion” do not acquire an adequate meaning. This leads to the shift of the original meaning of the headquarters’ policies towards the neutral meaning of diversity in Poland. In theory, the concept of inclusion is applicable in various workplaces and serves to make sure that all the differences are included, respected and valued in order to minimize eventual discrimination problems. The interviewees assumed on several occasions that inclusion does not make sense in the culturally homogeneous work environment with an overwhelming native majority. Yet, the single term “inclusion” makes its appearance in the management practices in firm A and runs under the heading “integration” in firm B, but it serves more as a means to promote the image of the company among the Poles (firm A).

It is necessary to take a deep dive into the real-life organizational context questioning whether all employees across different departments within one sector are equally concerned by DM practices or whether some sectors represent limits to the flourishing of DM? The French headquarters are likely to ignore the sectorial context, assuming the unified outcomes of DM for the subsidiaries exerting the same activity. However, each sector and industry have its specificities (e.g. involvement of production process, nationality of clients or interdependence of the government) which may hamper or contribute to the thriving DM initiatives.

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<sup>51</sup> See definition in the literature review.

Another questioning relates to the national and regional variations in diversity management often ignored in the corporate D&I strategies, for example, the age gap or a limited knowledge transfer between the national headquarters and the regional offices of the recipient countries. As seen in the findings, it would be challenging to imagine a smooth transfer of DM in the workplace with a dominant age group of generation X of Polish nationals. Another important question is whether the KT (Knowledge Transfer) fosters or hinders the DM transfer in Poland. The international sharing of skills and knowledge between Polish and foreign employees may indeed positively influence the local adoption of DM practices, not the approach of the headquarters, but a new form of DM which will be presented in the next chapter: Discussion.

## 6. CHAPTER SIX - Discussion

## 6.1. Introduction

It has been shown that the classical approach of DM with regards to recruitment, non-discrimination, and promotion of multicultural and inclusive workplace (Cox, 1991) has not been effectively transferred to Poland in the case studies under scrutiny.

The concept of multiculturalism, which is at the heart of the research in diversity management and intercultural management (Chevrier, 2015; Segal, 2017), has been studied in organizations mostly in relation to countries facing immigration issues (Klarsfeld, 2010). The theoretical debate is divided into two separate concepts: the assimilationist and multiculturalist approach. The assimilationist approach received multiple critical reviews (Pierre & Mutabazi, 2008) as it means the absorption of differences are accompanied by the avoidance of issues related to ethnic diversity and discrimination. The multiculturalist approach is characterized by visible segregation of ethnically diverse people within communities and organizations. Both concepts are often discussed in relation to the immigration countries like France or US. Currently, Poland is not a part of this group, and such an approach is absent in the Polish workplace<sup>52</sup>.

The main aim of this chapter is to discuss the findings in alignment with the theoretical framework: DM research (homogeneous/heterogeneous dichotomy), international transfer in management (the transfer failure and the local reinterpretation), and the Polish DM literature.

The findings comply with the interpretative studies in DM (Brabet et al. 2019; Chanlat & Özbilgin, 2017) which advocate for the consideration of the intra-national variations in the definitions of the diversity concept and related management initiatives. It is not surprising that one could wrongly assume a certain proximity with the promotion of the managerial initiatives in Poland and the lack of interest for certain managerial concepts imported from the West. The insights into the Polish experience with DM give a clear call for the consideration of sectorial limits, when it comes to the production company. The intercultural state of DM seems to vary from one sector to another. Moreover, the absence of meaningful DM practices in all four case

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<sup>52</sup> In the findings and the literature, we often refer to the dominant Anglo-Saxon model of DM for several reasons. It gained a high interest among researchers in DM and constitutes a point of comparison with the experiences in other countries (Chanlat & Özbilgin, 2017). Second, it provides an interesting contrast with the Polish case, which does not embrace the widely recognized theoretical foundations of DM and practical aspects, from multiculturalism/ assimilation, non-discrimination to equal opportunity and HRM).

studies is quite a significant finding on the Polish context for transferring DM from western headquarters to local subsidiaries.

Therefore, the main aim of this chapter is to discuss the findings in alignment with the following theoretical framework: International transfer in management (the issues of transfer failure and the local reinterpretation) and the Polish DM literature. The first part of the discussion highlights the new dimension of the notion of diversity (international diversity management IDM) in Poland which intrinsically refers to international openness, but with a specific meaning attributed by Polish employees. The second part of the chapter will discuss whether the neutral approach to DM in the production company is an indicator of the failed transfer of DM or the fruitful local reinterpretation and whether the term “failure” is suitable when examining the intercultural understanding of diversity. To help overcome this impasse, the chapter will highlight how Polish scholars define “success” or “failure” of DM in Poland. The following figure illustrates two case scenarios of DM transfer.

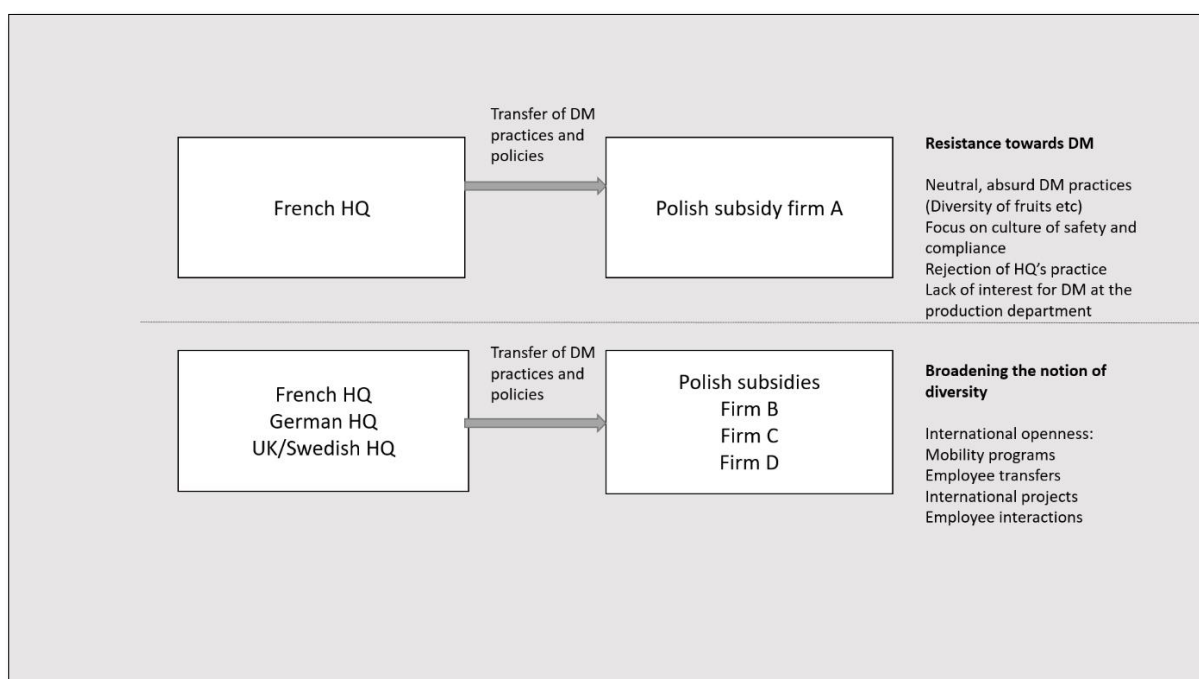


Figure 45 Case scenarios of transfer. Source: own

## 6.2. Broadening the notion of diversity from HR to international openness

From the preliminary investigation in firm A followed by the complementary interviews it became clear that the current materialization of the Polish commitment to DM does not comply with the DM literature in the field of HR management.

The lack of measures designed to promote diversity in HR has been explicitly acknowledged in the interviews.

|               |                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Firm A</b> | <i>If there is any recruitment, everyone should have access to it. Indeed, it is not limited to a specific group (...) All the aspects other than qualifications are of secondary or tertiary matter". (Finance specialist, 2016).</i>                                                                                                                                                                                          |
| <b>Firm B</b> | <i>Interviewer: Are there any diversity practices in recruitment?</i><br><br><i>Firm B: Practices? (...) no, in recruitment we focus on people's integration, which depends on the education and level of tolerance and acceptance of differences. In the low-level positions people are afraid of alterity when it comes to outlanders or people with disabilities" (Recruitment specialist, firm B)</i>                       |
| <b>Firm C</b> | <i>"I also think that we do not activate this diversity in such a way that people from other nationalities would come to us, we do not activate it, we certainly do not have such a need at least in Poland as long as there is silence around it. And also, this diversity does not come to us, that's how I would describe it (...) These practices do not exist here for the moment" (HR Business Partner, firm C, 2017)</i> |
| <b>Firm D</b> | <i>Me: Are there any diversity management tools?</i><br><br><i>Firm D: No, I think that it's the question of business priorities. Global teams and the headquarters focus on the critical areas of the corporate life here, and this is not yet the priority for us, but diversity inscribes in the values of the company, and we are developing towards it". (HR Services Lead for EMEA, 2017)</i>                             |

Figure 46 Diversity in HR. Source: Interviews

The interviewees point out the endogenous and exogenous reasons behind the lack of interest for diversity in the recruitment practices, for example: focus on the employee qualifications (firm A), the employee's integration (firm B) in the homogeneous environment, "fear" of alterity, as well as the contextual motives such as: silenced topic of an active seeking of culturally diverse workforce in Poland despite the shortage of candidates (firm B) as well as the assumed lack of candidates issues from different nationalities on the domestic market. The last hypothesis is doubtful, as the national statistics mention the fact that the number of foreign workers, temporary workers in particular, has been on the rise since 2007 (Gus, 2017). Also,

the interviews with members of the HR department (Training manager and Recruiter, firm B) suggest a growing number of foreign candidates in particular from Eastern Europe.

Data from the interviews around the topic of recruitment does not allow to fully grasp the reasons for the reluctance towards diversity in HR management and the absence of awareness-raising programs around non-discrimination. In a similar spirit, verbatims around recruitment do not indicate whether the concept of managing cultural diversity, as it is recognized in the literature, has been entirely rejected by Poles. While the repugnance of recruitment practices remains relevant to discuss, the understanding of diversity in Poland needs to be broadened to the term “international diversity management” (IDM) and take into account the larger transformations in Poland that have occurred over the past two decades.

The insights from three other case studies clearly illustrate the original form of diversity practice in Poland that is deeply rooted in the Polish collective mindset (Nowicki, 2002). The meaning of “openness” and associated practices has been identified in DM literature in terms of the level of openness in the attitude towards different nationalities which may also explain the complex nature of the relationship construction with the “other”. Klimkiewicz (2010) recognizes the fact that international corporations delegate Polish employees to foreign subsidiaries, creating the opportunity of a multicultural work environment.

DM in Poland reflects the idea of “international openness” seen through the lens of the relationships with the external stakeholders, including employees of other subsidiaries and clients. The international openness is not considered to be a product of a results-oriented and structured policy, but something that emerged in the Polish subsidiaries regardless of whether diversity policy has been implemented or not. The role of the headquarters seems to be essential in the emergence of DM in Poland, because it provides the opportunity for employees to be a part of a multinational group and to cooperate with teams from other subsidiaries.

The audit manager (firm C) when asked about DM practices, referred to the global mobility practices, arguing that: *“To be honest, I think that it is (development of DM) because we are more and more mobile and we want to go abroad and to see what is done in other subsidiaries, and I think it is cool. [...] We have a policy which promotes international mobility”*.

(Audit manager, firm C, 2017)



The audit manager provided an example of the employee mobility program viewed as a result of the implementation of the diversity policy. In fact, the “international openness” in firm C is not a new phenomenon and started around two decades ago after the Polish firm became part of the multinational corporation. What is interesting is that the cross-country and the possibility to travel to another subsidiary runs under the heading “Diversity Management” from the employee perspective, which is a relatively new phenomenon. It is argued that *“the importance of diversity emerged two or three years ago when the firm became more international. It is difficult to say, but I think that it [policy] inscribes in the transformation process of the firm C and indeed it is not a coincidence that I gave you these examples of DM [a reference to mobility programs] and it is constantly changing”*. (Audit manager, firm C)

One of the outcomes of the international transfer of diversity policies is the recognition and the use of “DM” jargon across various departments, but with a different meaning. The introduction of DM can be considered as a continuation of a profound social transformation of Polish firms (Kozminski, 2008) from state-owned companies to multinational subsidiaries. One could assume that DM in Poland is only an example of a wide range of imported knowledge and practices from the West, which are often “repackaged” (Kozminski, 2008) in order to make sense to the local employees. Kozminski (2008) argues that since the liberalization of the Polish market came into effect, Polish companies needed the conventional models of management in areas of marketing or logistics to build the managerial competence from scratch and face the quickly developing concurrence. An important question is whether DM can be considered as one of the conformist models of management exported from the West and the cultural transformation of the Polish organizations which continues today. The interviews offered certain indications about the “changing” and “dynamic” character of the international mobility programs, another example of DM practice.

For instance, the recruiter in the Innovation Centre stressed the benefits of diversity for the local department in Poland, for example, in the form of international employee assignments, which give an opportunity of knowledge transfer between West and East as well as personal and professional development for employees. The interviewee argued that: *“Diversity is important so people can learn and develop personally and get to know new things and new people. After I came back from the international assignment, it was very beneficial for the local department as well”*. (Recruiter, firm D)

For instance, there is a program called a “pilot” in the finance department of firm C (Audit) which consists of employee exchanges from 3 to 6 months up to one year. The Business development manager in firm B provided another example of “employee visiting” from other subsidiaries to Poland and conversely, from Poland to other subsidiaries. This insight confirms that the recruitment process focused on long-term recruitment of different nationalities and the overall change of the organizational cultures and workforce is inappropriate in the Polish subsidiaries, as they prefer to solve the skill shortage problems by transferring inter-subsidary people on a short term.

Business development manager (firm B) stated: *“Here there are many visitors who come for short-time assignments and employees from different parts of the world who come here very often. We can meet in the corridors during the week. (Interviewer: why do they come here?) They have a business to do here or come here to work remotely for their sites. The same is for us, as we can go anywhere in the world to work remotely from another site of firm B”*. (Business development manager, 2017)

DM results from international openness at the executive level of management, which translates into the presence of foreign members in the Management Board. The compliance director also confirmed that connection with diversity is possible through communication with the members of the Management Board, arguing:

*“I am in contact with diversity all the time, as I meet many people, especially in the areas of international affairs and projects, very often people who are foreigners or who occupy the positions in Management Board”* (Compliance director, 2017).

In post-communist Poland the management boards, that were previously predominantly Polish composed of the members of the political party, started to be influenced by foreign investors. These insights show that DM may occur without specific practices developed by dedicated and trained departments, therefore it can translate into inter-subsidary people interactions at different levels of management.

DM viewed as the “international openness” in the Polish subsidiaries should not be narrowed to the purely communicative and cooperation purpose, but it should consider the historical context and the circumstances of DM emerging in Poland. It turns out that not only the term “diversity” but also the notion of “openness” may be seen differently across the cultural universes. In the US or France, the term “openness” may be associated

with affectionate relationships for American-Latinos or with the calculated exchange of ideas and the art of discussion for French people (Sauvage, 2019).

The concept of “openness” seems to be a double-edged-sword for Poles. On one hand, the findings imply the aversion to create a culturally diverse community within the Polish workplace to reduce the risk of discrimination, which can be viewed as a reluctance towards the conventional forms of DM. On the other hand, Polish employees are eager to explore the individual benefits of the openness and enhance the organizational learning opportunities in order to “catch up” to the western counterparts. For example, one of the phases of the multi-level transition process (Kozminski, 2008) is the integration within the European region and the development of “pro-active employment policies”. However, due to the un-relatedness with HRM, it seems inadequate to label DM policies as the current “employment policies”.

Another important question is “How to explain the use of the concept of DM to foster the “international openness”?”

Nowicki (2002) brought to light the attempts to reaffirm the Polish belongingness to the European region after the years of border closure accompanied by the Polish fascination by the Western “better” Europe. Nowicki (2002) explains that Poland faces the encounters to develop the collective consciousness of the concept of alterity, which has been diminished during the years of the wrongly assumed national homogeneity (Nowicki, 2002). The promotion of differences, typical for western immigration societies, is neglected in the Polish institutions struggling to build awareness around the very basic concepts of diversity and alterity.

The complex nature of DM in Poland reflects the current debate around the reconstruction of the “European common identity” (Nowicki, 2002) as well as the historically constructed fear of the national identity deprivation which persists in the national Polish imaginary. The Polish case is characterized by the aspirations to import the Western ways of life on one hand, but on the other to preserve the closed borders, especially towards the unknown, “foreign” and “immigrant” populations. Nowicki (2002) highlights the division of Polish society between two opposite forces: the traditionalist and the cosmopolite attitudes. The first one might explain the resistance towards the HR mechanisms of recruiting and

attracting people from different national cultures. The second reflects the aspirations towards the cultural modernity achieved through the knowledge of languages, literatures and the interactions with the western “intelligentsia” (Nowicki, 2002).

Having a closer look at the insignificant DM practices and the new forms of DM, can it be assumed that Polish firms failed the commitment to diversity because they did not see the merits of DM?

### 6.3. DM transfer: Success or failure?

#### International transfer in management

Three main scenarios of transfer from the host country to a recipient country were identified: a smooth unproblematic transfer, the hybridization of management practices (Fortwengel, 2016; Yousfi, 2013) and management ignorance followed by the local resistance (Vassilopoulou, 2015; 2017). While the previous studies focused on the success or failure in the transfer of strategic organizational practices (Kostova & Roth, 2002, Fortwengel, 2016), the current findings lead to deliberations regarding a possible “failed transfer” within the Polish context, but also the interesting trajectory of diversity management policies and practices in Poland.

Based on Kostova (1991), Brannen (2004) argues that the successful transfer occurs when:

*“Strategic organizational practices (as defined by Kostova, 1991) that are value and meaning based, success of transfer is predicated on the diffusion of a set of organizational rules along with the transmission of the meaning of these rules among individuals of the recipient organization. The transmission of meaning of organizational practices and other firm assets across cultures is done through cross-cultural communication”.*

The Polish subsidiary in firm A has accepted a set of guidelines in the form of diversity policies, but with a different meaning and application. Moreover, the relationship between the firm A and the French headquarters clearly illustrates the cross-cultural communication problems reflected in the way that the French team has vainly expected the Polish counterparts to accept and uncritically adopt the international stereotyping campaign.

Other scholars (Sauvage, 2019; Tréguer-Felten, 2009; 2017) point out the linguistic dissimilarities, as practices are disseminated locally in different languages leading to misunderstandings as well as the rejection of the corporate vocabulary (case of firm B and the shift from “Diversity and Inclusion” to “Diversity and Integration”). However, these differences may be synonymous with DM failure or local reinterpretation, depending on the point of view of the subsidiaries versus the headquarters. The core problem in Polish firms is not the linguistic divergence, but the denial of the present risk of discrimination in the native dominant environments and communication on the sensitive issues and “taboo topics” (Grzesiak, 2017).

However, the outcomes of the managerial transfer in Poland should not be compared to the western experience without due discernment, because Poles simply didn’t have the opportunity to fully absorb the western knowledge while dealing with the intra-national economic, political and cultural transformations (Obloj & Thomas, 1996).

### DM research

The findings comply with the interpretative studies in DM (Brabet et al. 2019; Chanlat & Özbilgin, 2017) which advocate for the consideration of the intra-national variations and the historical construction of the definition of diversity. The current chapter does not presume a defect nature of DM transfer in the culturally homogeneous countries and organizations with the dominant white (and native) and potentially exclusive organizational culture, but rather informs of the resistance to headquarters’ diversity policies which often reflect the multiculturalism and management of immigrants and ethnic minority population.

For instance, the recent rise in the nationalistic attitudes has been identified in both western European states (like France, Italy, Austria and beyond) and in the Eastern European countries like Poland and Hungary regardless of the level of cultural homogeneity. What must be taken into account to understand the hidden and underlying rationale for the organizational resistance, is the historical contextualization of diversity management, as according to the findings, it highlights the deeply-rooted context of a shared national identity. History is an important source of information about the present state of society (Tabaszewska, 2016) and

current cultural change, which is the key element to capture the early stage and developing nature of DM in Poland.

DM literature presents various scenarios of organizational failure, for example the failure to address the gender gap in a male-dominated workplace (Williams et al. 2014) or to encounter the constraints of the institutional context which obscures the real-life problems of racism (Kersten, 2000). Vassilopoulou (2017) illustrated a setback in the implementation of the global diversity policy in German subsidiaries, as the local interpretation neglected the profound problems of discrimination and inequality, particularly in the context of ethnic diversity.

Dobbin & Kalev (2016), in the article entitled “Why Diversity Programs Fail”, highlight the ineffective efforts (training, mentoring and hiring) and inefficient tools to increase the diversity of ethnic minorities and gender in the US companies. The advocates of the mainstream research could assume that the absence of the “return programs on diversity” (Dobbin & Kalev, 2016) and dedicated staff trainings in Poland is a factor of failure.

It is not surprising that the universal dimension of the term “failure” ignores the fact that successful DM practices in different cultural environments do not necessarily encompass the classical tools advocated by the Nord-American studies. Of course, in the case of international comparison, the organizational record on the non-discrimination practice or a high representation of cultural diversity in the management positions in Poland could be interpreted as the success story. Yet, an important question is whether the lack of these measures is a sign of a total failure of DM and whether the phenomenon of failure can be taken over uncritically and without cross-cultural reflection? The interpretative studies in DM provide a partial answer to this question. The case studies provide the understanding of intercultural DM situations and experiences which do not exclude the possibility of emergence of completely new and meaningful diversity practices.

In the headquarters-subsidary perspective, it is important to highlight the contextual elements: Who failed what? From what perspective? (That of the headquarters or the subsidiary, the “players” (those who are in charge of implementation) or the “subjects” (those who receive it) (Maj, 2017)?

Therefore, one could assume to some extent the “failure” of DM mainstream classical model implementation in the Polish subsidiaries. One argument here is the absurd and culturally neutral character of diversity initiatives in the production company (firm A), which according to

the commonly accepted policy, were designed to instil equality, promote diversity and prevent discrimination. The Polish subsidiary had the autonomy to deploy the local action plans but was expected to respect at minima the common values of a multinational company where the risk of discrimination and stereotyping might occur despite the dominant cultural homogeneity. Also, the presence of the national symbols in the Polish diversity campaign and the willingness to preserve the Polish work environment could also be considered as an illustration of DM “failure” in the eyes of the headquarters.

Failure might occur at the recipient levels in the subsidiary of firm A, as even locally reinvented DM practices by Polish managers triggered dissatisfaction or lack of interest among the recipients at the lower levels of management. The support of top management at the subsidiary level is not the prerequisite for the successful implementation of diversity policies (Bruna, 2016) and should be accompanied by a strong engagement of stakeholders in the bottom-up perspective (Maj, 2017). Finally, it could be argued that the interruption of the diversity policy after the ownership change reflects the “failure” of DM over time, as the policy has left no clear trace in the employee structure.

Nevertheless, the term “failure” seems to be problematic and should be revised cautiously, as it ignores the cross-cultural variations of DM and divergent meaningful references of diversity. The Polish managers in firm A who oversaw DM implementation think that the local diversity practices reflect the organizational mindset and have been implemented with success. The term “failure” does not capture the actual interpretation of diversity practices viewed through the lens of international openness that serves to mobilize the concept of DM and makes it meaningful for Polish employees. For this reason, the term resistance seems more adequate, as it highlights the refusal of the international management standards of diversity in all case studies (firms A, B, C, D).

It seems that there is no straightforward answer to the question whether DM failed in Poland or not. On the one hand the understanding of failure should not be taken for granted, just because of the universal qualification and the use of English as the *Lingua Franca* in the DM management research (Tréguer-Felten, 2013). On the other hand, the contextualization of the phenomenon of “diversity failure” could lead to cross-subsidiary misunderstandings and serve as a cover-up for the lack of actions to address the real problems, such as racism, xenophobia or stereotypes.

In a similar perspective, the polysemic character of diversity (Chanlat & Özbilgin, 2017) allows for a free interpretation in different organizational practices, settings and national contexts. The organizational consent to do so can be a means for Poles to use the heading of “Diversity and Inclusion” for the apparent elements of HR, such as employees’ professional qualifications and personalities (firm A), and to shift focus away from the real problems of diversity, inequality and discrimination. Moreover, it enables the local teams to accept the corporate buzzword “Diversity and Inclusion” and use it in a way that is valuable and impactful for the local actors. There is no such thing as a “successful definition of the concept of diversity” in the literature, but there is evidence of its effective outcomes for entire societies, organizations and individuals.

It is interesting to see how the Polish scholars in DM decode the dilemma of the (un)successful implementation of diversity practices in the Polish subsidiaries. For example, Maj (2017) stated that the key to a successful implementation of diversity practices in Polish firms is the commitment of the stakeholder’s groups (from internal stakeholders including employees, managers) to external stakeholders (government, customers, NGO’s etc.). However, it is not clear what is meant by the successful realization of DM in practice. The following section will tackle the question of how Polish scholars define the success/failure of DM in Poland?

#### 6.4. Learnings from the Polish DM literature

*“The diversity management is a topic that is becoming more and more popular in Poland nowadays. It is not a kind of a fad or a whim – it is a challenge that every company copes or will cope with soon”.*

(Wziatek-Stasko, 2014)



There are several statistical studies on diversity management in the multinational and small and medium companies in Poland<sup>53</sup> (Grzesiak, 2017; Maj, 2016; 2017; Maj & Walkowiak, 2015; Rakowska & Cichorzewska, 2016; Szymanska & Aldighieri,, 2017). These studies draw mainly on data from company websites or published communication such as the European Diversity Charts. One of these studies (Maj & Walkowiak, 2015) focuses on the maturity level in the implementation of DM strategies that would be implemented as the elements of non-discrimination and equal opportunity policies. The study assumes that “what the company communicates externally, is similar to what the company is doing in terms of the DM agenda”. Other studies wrongly assume the convergence between the organizational diversity practices on the ground of gender, disability and age in Polish firms as compared to other Western European companies (Waligora, 2018).

Many scholars (Szymanska, 2017, Waligora, 2018) pointed out the infancy stage of diversity practice development in Poland, which does not allow to assess successful outcomes of DM, arguing that the firms in Poland only gradually adapt the western solutions. The scarcity of the qualitative in-depth research methods in the Polish context makes it difficult to decipher the successful outcomes of DM practices by Polish researchers.

Other scholars highlight the positive outcomes of managing diversity as development of human capital (Jamka, 2011), which became the buzzword in Polish references. Walczak (2018) explained that the success factor of DM in Poland is the share of knowledge, skills and experience, while the principle of equal opportunities should be focused on the “*employment of talented and creative individuals who have a positive impact on the organizational performance*” rather than the preferential tools dedicated to the minority groups (Walczak, 2011, p.6).

The Polish approach seems to ignore the mainstream measures focused on the discrimination-fairness and learning paradigms aligned with the EEO legislation (Ely & Thomas, 1996), it could therefore potentially lead to the “failure” of DM on the international arena. At the same time, the findings highlight the existence of the formal commitments referring to the human capital and diversity, but there is no evidence of its actual realization.

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<sup>53</sup> These studies do not provide a detailed picture of the companies under study.

Due to the scarcity of grounded research in Poland, Polish scholars often refer to the universal postulates, arguing that DM coupled with the creative workforce is the prerequisite for better financial results. The findings do not support this hypothesis, as many interviewees do not believe in the positive correlation between diversity of nationalities and better financial results.

Another interesting point is that “failure” or “resistance” have rarely been identified in Polish literature. In most cases, the phenomenon of organizational resistance is replaced by the analysis of a collective attitude of “openness” towards other nationalities (Wieczorek-Szymanska, 2017). Some scholars point out the unfavourable socio-economic environment considered to be a “threat” for the development of DM in the field of the human capital policies (Walczak, 2011), whereas other studies highlight the importance of the adoption of Diversity Charters (Maj, 2015). Wieczorek-Szymanska (2017) suggests that the six main perceived barriers to diversity management are (from the highest impact to the lowest impact) linguistic barriers, stereotypes, prejudice, ethnocentrism, ignorance and lack of openness to inclusion.

The Polish literature emerged recently after 2010 and is focused on the early stage of DM analysis which is the recognition of the benefits of DM for organizations and individuals, whereas the mainstream literature was much more advanced at this point. One of the very few studies based on interviews (Maj, 2017) underlines the lack of understanding of the concept of DM in Polish firms which hampers the managerial practices and makes it more challenging to decode DM in two narrow categories: success or failure. The author argues (2017):

*“Also problematic is the approach of identification of diversity and diversity management as it may suggest that although the organizations perceive diversity and maybe even recognize some benefits from it, they lack a clear strategy and therefore a way of reaping the benefits”.*

(Maj, 2017)

Findings of the study (Maj, 2017) comply with the idea of a difficult evaluation of the extent to which diversity strategies are seen as successful or failing in the managerial perspective, simply due to the problematic recognition of the concept of “diversity management” and the uncoverable national context. Maj (2017), in the review of diversity literature as well as the institutional initiatives and reports on diversity and discrimination in Poland, argues that the demographic context of the Polish society should be considered while studying DM, as:

*“The term diversity is not neutral in Poland. It is emotionally charged. One of the reasons is the high level of homogeneity in Poland on the ground of religion, ethnicity, and multiculturalism” [...]. One of the most problematic issues is the issues of a different nationality or ethnic origins. However, due to the globalization of the market and people’s migrations, the Polish market is becoming more open to other people of different nationalities and ethnical groups”.*

Maj (2017)

Wieczorek-Szymanska (2017) argues that the openness towards a cultural diversity is likely to be the factor of success in making DM a meaningful commitment for Polish firms.

*“It seems that the Polish market is open to diversity and adopting a conscious openness to diversity management in companies. It is particularly meaningful when Polish companies are opening up to employees from different parts of the world (...) It will be important to see the evolution of the topic in the upcoming years, and to see how Poland and its workforce will adapt to those; in particular, how deeply companies will be willing to invest in diversity management and its understanding – this will probably be the key to success in the future.”*

Wieczorek-Szymanska (2017)

This thesis allowed to discuss the possible risk of DM “failure” in the international comparative perspective of firm A and provide evidence of the local ignorance of the global diversity policies at the operational levels in other case studies. Since the organizations in Poland recognized the phenomenon of DM only recently, future research may question how the organizations will define the successful implementation of DM specifically in the Polish context over time. In light of the demographic changes, there is a critical need to study the Eastern-European organisational issues of diversity management, although the concept is also seen as a result of fashion disseminated by international corporations (Maj, 2017). In his study on the adoption of DM initiatives based on the analysis of the Diversity Charters in 113 signatory companies, Maj (2015) argues that *“diversity management still has a relatively long way ahead of it and that it is rather a novelty on the Polish market than the generally applicable standard”.*

It would be incorrect to state that the DM exported from the West to Poland has totally failed its purpose, as there seems to be significant progress in the recognition of human rights and freedoms and in the emergence of the term of diversity over the last decade. At the same time, the concept of DM appears to be in disconnection with the prevention actions regarding the

non-discrimination discourse, encountering racism, xenophobia, nationalism and anti-immigrant attitudes in Poland. Grzesiak (2017) argues that:

*“It is likely that people speaking out about bad practices in their company may not be willing to talk about abuses taking place in terms of diversity management. The issues relating to bad practices are awkward and sensitive, often being a taboo topic in organizations”.*

## 7. CHAPTER SEVEN - Conclusions

## 7.1. Thesis contributions

This thesis examined the transfer of DM policies and practices from multinationals to Polish subsidiaries. The aim of the thesis was to examine the cultural and organizational issues that influence the international transfer of DM, as a polysemic and historically constructed concept. This thesis aimed not only to contribute to the understanding of a relatively unexplored phenomenon in an Eastern European country, but also to analyse and understand the rejection and local resistance to classic (i.e. Anglo-Saxon) forms of diversity management traditionally focused on non-discrimination, recruitment and attraction of new talent internationally.

This chapter starts with a summary of the theoretical, methodological and managerial contributions and continues with research limitations.

### Theoretical Contributions

First are discussed the theoretical contributions to DM and to the broader international transfer literature. A distinction is made between two literatures: the studies that support the findings and the literature to which this thesis aims to contribute.

| Thesis contributes to :                                                                                                                              | Thesis draws on :                                                                                                                                                                                                                            |
|------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Diversity Management Research</u><br>(interpretative studies from different national perspectives (Chanlat & Ozbilgin, 2017; Brabet et al. 2019)) | <u>Diversity management research</u><br>( <u>Contextual and sectorial contextualization, Organizational resistance to DM</u> )<br><br><u>The national identity in Poland</u><br>(“Sense of belonging” (Lodzinski, 2012; Delsol et al. 2002)) |
| <u>Intercultural transfer in management</u><br>(D’Iribarne, 2012; Chevrier, 2015)                                                                    | <u>International transfer in Management</u><br>(Institutionalist theory (Kostova, 1991))                                                                                                                                                     |

Figure 47 Theoretical contributions, source: own.

## Diversity management research

This study is part of the critical analysis for the transfer of diversity management tools with a universal vocation. The research constitutes a theoretical contribution to the interpretative studies in DM (Özbilgin & Chanlat, 2017; Brabet et al. 2019) and the critical approaches to diversity management (Kersten, 2000). This research illustrates the national and sectorial contextualization as well as the interrelation approach to studying DM: the mezzo (organizational) and the macro (national) influences and their impact on DM (Özbilgin, 2005; Vassilopoulou, 2015).

The relationship between diversity and identity in the organizational life was identified by scholars, in relation to ethnic diversity (Holck et al. 2016). Also, multiple studies discuss diversity management from national perspectives, while referring to the national debates around the citizenship construction as well as the tensions of national identity, drawing for instance on immigration legislations and political perspective rather than management practice.

Many studies apply the social identity theory or the poststructuralist approach to identity (Holck et al. 2016). This research combines two elements: the historical construction of diversity and the national identity drawing on the studies of scholars in social science and history (Nowicki, 2002; Lodzinski, 2012). The thesis revealed that the alleged “failure” of the Anglo-Saxon classical model in Poland could not be understood in isolation from the national history, especially from the historical background of the struggle to restore and preserve the dominant Polish national identity. This had implications for the narrow organizational DM agenda, leading to the rejection of practices promoting the idyllic principle of an inclusive, multicultural environment. The Polish nation has suffered historically from oppression and discrimination and was deprived of the use of the Polish language for vast periods of time. The principle of equal opportunities in employment with regards to nationality seems to be inappropriate and can be considered as a “taboo topic” in the local organizational discourse.

Based on the multiple case study analysis, this thesis also showed that DM is not only seen through the lens of HR management, equal opportunity and non-discrimination discourse, as it is largely recognized in the mainstream literature. This research is based on interviews with HR personnel at all levels of management (recruiters, managers, business partners, and HR

directors) and other departments (from Executive management to production workers), arguing that the HR department is sometimes less involved in the Polish DM agenda. In addition, the thesis allows to broaden the widely discussed concept of diversity to the new dimension of “International Diversity Management” which applies specifically to the Polish organizational context.

The findings contribute to the “stakeholders management” analysis in Polish DM studies, arguing that a “successful” implementation of DM (Maj, 2017) is determined by the level of engagement and management of various stakeholders: “Subjects” (employees, trade unions, NGOS); “Players” (managers responsible for DM promotion); “Crowd” (media, competition, customers, community and society) and “Context setters” (shareholders, governments and regulators) (Maj, 2015). This perspective assigns a contrasting role to different stakeholders, for example a positive role that NGOs play in the promotion of cultural diversity at the macro level and the unfavourable role of the government, which makes it difficult to clearly identify a successful model of DM implementation in Polish organizations.

The diversity policies may have direct effects on the implementation of diversity practices (Bruna, 2019) and on their successful implementation. This thesis adds to this argument, as it starts with the investigation of diversity policies, arguing that the concept “diversity policy” is rather an abstract idea for Poles and may be covered by other unrelated documents, such as Code of ethics, CSR agreements or Human rights policy. It means that the term “diversity policy” should also be contextualized in the Polish organizational setup.

This thesis adds to the existing contextualization research in DM, arguing that the analysis of DM should be conducted according to sectors, with a strong focus on the difference between production firms and service or innovation firms. The sectorial embeddedness of DM has been recognized in the literature, but it gained little traction among researchers.

Finally, the concept of the Polish national identity is linked with the Catholic traditions in Poland and the conviction of a national mission to preserve the foundations of Christian Europe embraced in the Polish romantic literature. Therefore, the importance of national beliefs was mentioned in the chapter on the Polish context, but was not developed in detail, as religion is one of the dimensions of diversity and has been voluntarily omitted in this thesis.



### Intercultural transfer in management

Regarding the literature on the transfer of management practices between the headquarters and the subsidiary level, the current research focused mainly on the subsidiary perspective. This is a contribution to the studies concerning the intercultural approach to management transfer, which suggest that management practices are rooted in the cultural contexts (Chevrier, 2015) and may be locally adjusted or entirely reinvented by managers. The shift of meaning in diversity practices in firm A was deciphered by analysing the (Polish) language used in local materials and in the interviews with Poles in their native language.

In light of the mainstream “universalist” theories of managing diversity, this thesis allowed to confirm that the transfer cannot be understood in separation from the local frameworks of meaning that differ from one country to another (D'Iribarne, 1989). Also, the misunderstanding between Polish and French employees (firm A) clearly show the interference of the intercultural communication issues in the context of the global policy transfer.

This thesis confirms the idea of intercultural management transfer from the linguistic perspective (Tréguer-Felten, 2009), as the disappointing transfer of DM can be justified by the linguistic dissimilarities, thus inappropriateness. The use of English as the “Lingua Franca” (Tréguer-Felten, 2013) in the field of DM ignores the fact that the key terms in one language may be difficult to translate to another language, while keeping the original meaning (for example the key DM term “inclusion”). Findings show that the use of the corporate language when attempting to transfer DM cannot bridge the intercultural gap between the headquarters and the subsidiaries. Finally, certain scholars point out that from the larger socioeconomic perspective Poland has been a representative country of the western transfer of various tools for the last three decades but is still neglected in management research.

### Managerial implications and contributions

The insights from the study suggest that the non-discrimination policies lack recognition in the workplace and exist only at the high compliance level, therefore the topic of “equal opportunity” regarding nationality is a social taboo. Also, Poland does not have the long tradition of anti-discrimination policies, because the non-discrimination employment

legislation emerged over the last two decades, precisely after the accession of Poland to the EU in 2004. For this reason, raising awareness around this topic is a critical step in the context in which a culturally dominant group may obscure the risk of exclusion of minority groups with other nationalities.

Another point is the recognition of the value of international profiles and diversity in talent attraction strategies, which can be the key to fill the shortage of skills in the future. Despite the emigration of Polish workforce and growing needs in employment, the historical background of Poland makes it challenging to imagine the establishment of a multicultural work environment, especially in production companies and related sectors, in which the use of Polish is dominant. An important question is: What form of DM could be appropriate in the production sectors in Poland, with its strong tradition of trade unions, in order to preserve the social cohesion of Polish-speaking, native employees across different age groups? The internationalization of organizations (Maj, 2017) seems to be an opportunity to develop the diversity management in the private foreign-capital organizations in various sectors.

There are a couple of insights from this research for HR and Compliance departments in Poland, who are overseeing the implementation of the DM policies and practices. In order to make the Diversity Charter an effective tool of change in Poland, there is a need to recognize palpable and measurable actions going beyond the limited dimensions of DM and the less problematic aspects such as gender and age. In France, it is widely acknowledged that diversity goes in pair with discrimination discourse and diversity management sheds light on the dimensions that are highly exposed to discrimination and are therefore problematic in a social debate.

The recommendation for the local managers is twofold. First, there is a need to explicitly address the risk of discrimination in the workplace in Poland and to implement measurable policies based on meaningful action plans in line with international standards. The findings of this study show that a good start, to make DM more meaningful, is through the international openness or the so-called international mobility programs which somehow lead to raising awareness about cultural diversity. Second recommendation is to organize focus groups in other departments than HR, with employees at low levels of management in the operations. This will allow for a better contextualization of DM initiative, capturing of signals and closing the feedback loop for the implementation and adoption of new DM practices.

## 7.2. Research limitations

### a) Theoretical limitations

It was clear from the beginning of the research that the interest of this Ph.D. is the study of diversity within the unique Polish context and its impact on organizational life. It was impossible to treat the concept of diversity in all of its aspects, including gender, age, disability, as that required a separate in-depth analysis of the external environment regarding these aspects. However, the focus on a single dimension, diversity of nationalities, turned out to be the right choice which allowed to consider the broader historical context and identity issues and the role it plays in diversity management in Poland. The problem of discrimination and the study of cultural perception of nationality diversity and the historical construction of “other” in the individual perspective could be done in another thesis.

The study points out the narrow perspective of the mainstream DM research, but the main attention was paid to the studies of DM from different national perspectives which allowed to dress the geographical panorama of the heterogeneous/homogeneous dichotomy. In the same perspective, the variety of approaches of the national identity were not presented, and instead, I looked at the concept of Polish national identity, which turned out to be the key element to fully grasp the uniqueness of DM in Poland and its limitations.

### b) Methodological limitations

The first limitation is related to the confidentiality of the findings, which was the key condition to conduct interviews, especially at lower levels of management and other departments. However, the confidentiality turned out to be a non-limiting issue due to the availability of external sources of information providing elements of the organizations’ contexts. Also, the choice of the interviewees was determined by the managers. The verbatims from the interviews with the foreign employees were not analysed in detail in the findings, due to the narrowed scope of research on the Poles’ perceptions.

The thesis refers to the headquarters’ policies and practices, but the access to the headquarters was not granted for this thesis. I draw on the internship experience in the French headquarters of firm A in 2015, the internship report and external evidence regarding other

case studies. The limited scope of the Polish subsidiary was overcome thanks to the rich data, the multiple data sources and extensive data from the interviews and publicly available headquarters communication. However, data from the interviews in Polish subsidiaries allows to say that the headquarters' initiatives were rejected or met with criticism (firm A). Due to the abundant documents in the appendix, we decided not to include the written evidence of the diversity policies from the headquarters, which are of a secondary importance for the discussion of the findings.

Finally, the study showed that DM should also be contextualized regarding the sectoral differences, with a strong emphasis on the limitations of the production sector. However, this Ph.D. does not provide a detailed analysis of each sector (finance, services, and biopharmaceutical) which could be done in another study.

### 7.3. Suggestions for further research

#### a) Articulation with the national culture

DM in Poland could be studied through the lens of the interpretative approach of national culture by D'Iribarne (1989). Philippe D'Iribarne defined national culture as "a collective framework of meaning" shared by the actors in a given cultural area. According to this approach, each society has evolved throughout its history and the unique cultural references which enable the understanding of how the local actors make sense of the practices and everyday situations within organizations. The author has conducted in-depth investigations across multiple countries, aiming to decipher the hidden meanings behind the local resistances in the organizations confronted with the implementation of the western principles of management (D'Iribarne, 2012).

Using the framework of national and organizational culture, D'Iribarne (2012) provided relevant insights into the understanding of how subsidiaries interpret and materialize corporate values, querying how these values are acceptable in each national context. This unique perspective would be relevant to the study of diversity-related practices in a headquarters-subsidiary comparative analysis. Conversely to the mainstream US-based research advocating for the universal benefits of DM (Cox, 1991), the framework of the national culture would also

be relevant to demonstrate the uniqueness of the local contexts in which the transfer of DM took place. It was complicated to conduct a comparative research on the implications of the impact of the national culture viewed as a shared framework of meaning (D'Iribarne, 1989) on DM agenda and analyse the headquarters-subsidary relationships.

The scope of this thesis is narrowed to the term of national identity and sense of belonging, rather than the national culture, which is a larger and more difficult to decipher concept. D'Iribarne has developed a profound analysis of the concept of culture viewed through the fears and the ways to conceal these fears in each society (D'Iribarne, 1989). The research by D'Iribarne draws on the qualitative analysis and an intense, complex ethnologic investigation, which has not been possible in this thesis.

D'Iribarne (1989, 2012) has provided a meticulous analysis of the employees' remarks, opinions, experiences and feelings in different aspects of their organizational life. The saturation of this ethnographical data allowed to capture the unique characteristics of the national culture. However, the scope of questions in this thesis was narrowed to the topic of diversity management, and the Polish interpretations of diversity represent only a single layer of a complex concept of national culture. Also, the representation of the national culture in terms of the employees' experiences and "conversations" would be relevant in the analysis and real-life observations of the concrete situations of cultural integration in which Polish employees would work with foreigners. However, from the methodological standpoint, the interviews should draw on questions that are not related to diversity but other topics (D'Iribarne, 2009).

#### b) Headquarters-Subsidary relationships in the study of transfer

As it was suggested in the research limitations, the research problem is built upon the hypothesis that the failure to comply with the international management standards in the area of DM in the Polish subsidies may be determined by the lack of understanding and intercultural communication issues between headquarters and subsidies. This perspective would require drawing on the literature about headquarters-subsidary relationships while taking into account the contextual background, for instance, the post-colonial literature which apparently applies to the context of Eastern European countries.

Future research could be extended to a single case study of a public company which has acquired the Polish subsidiary of firm A, previously held by French multinational group. This perspective would provide a detailed inquiry about the sustainability of diversity policy and practices after the organizational change, while applying the comparison between the private and the public sector (Abaker et al. 2019).

c) Intercultural management - focus on culturally diverse teams

This thesis draws on interviews with Polish as well as foreign employees. The study has shown that employees of different nationalities are not aware of the context of diversity and non-discrimination policies. Moreover, the interviews divulged implicit clues which could serve as factors in the analysis of different nationalities' potential exclusion in the workplace in Poland, such as occasional use of Polish language despite the presence of a cultural minority or references to the history between Ukraine and Poland during the training (firm A). In respect of this, future research could be extended to the analysis of the work relationships between Polish natives and other employees of different nationalities in the Polish workplace with a focus on the risk of cultural exclusion of people with different nationalities or ethnic origins in the context of international projects. However, this scope of study would require conducting in-depth interviews with employees of different nationalities using an extensive questionnaire on other topics than diversity management.

#### 7.4. Concluding remarks

*“Terre d’interculturalité par excellence, car la diversité culturelle y est mise à l’épreuve depuis la nuit des temps et confrontée avec l’identité nationale, elle-même souvent remise en cause, ses habitants ont par conséquent beaucoup d’expériences à partager, loin d’être toutes négatives, contrairement à l’image stéréotypée que cette aire culturelle continue à véhiculer en Occident en matière de vivre ensemble. »*

Nowicki (2008)

The main aim of this study was to illustrate the under-researched and yet critical topic of cultural diversity management within the highly homogeneous work environment and national context, currently famous for the nationalist aspirations and anti-immigration rhetoric in Poland. Although the downfall of communism in Poland is a closed chapter in the national history, it seems that diversity management is an integral part of the undergoing transformation of the Polish business environment, but also an ideological barrier between Western and Eastern Europe. The inclusion of cultural minorities in the native dominant society and the materialization of the non-discrimination policies should be enlightened in the political debate and organizational discourse. In order to raise awareness and introduce practices, not only around the international diversity management (IDM), but also around the less comfortable topics like diversity of religions, LGBT and transgender communities, it is crucial to uncover the historical foundations of the national and patriotic aspirations in Poland and reveal the hidden assumptions of its culturally homogeneous society.

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## APPENDICES

### Appendix 1. Introduction to the interviews

#### Introduction

I am doing a doctoral research in Management Sciences at Paris Dauphine University. I am interested in how the Polish subsidiaries of multinationals implement diversity management practices and policies. I am doing around 10 interviews in different departments which may take up to one hour. I will ask you a few open questions and you can speak freely and provide your personal opinion on the topic. Then I will follow up with semi-structured questions. I signed a confidentiality agreement and all the interviews are anonymous and the names confidential. I will record the interviews for the transcription purpose if that's okay for you.

#### Introduction in Polish

Piszę pracę doktorską o zarządzaniu różnorodnością w Polskich oddziałach międzynarodowych firm i interesuję się tym, jak praktyki i polityki różnorodności są implementowane w Polskich firmach. Organizuję około 10 rozmów z pracownikami z różnych departamentów. Rozmowy mogą trwać maksimum godzinę. Mam kilka pytań, ale liczy się twoja osobista opinia na temat zarządzania różnorodnością. Zadam również kilka dodatkowych pytań. Podpisałam klauzulę o poufności informacji i wszystkie rozmowy łącznie z imionami są anonimowe. Chciałabym nagrywać rozmowy tylko i wyłącznie w celu transkrypcji jeżeli to nie jest problem.

## Appendix 2. Interview guide (complementary interviews, firms A, B, C, D)

1. Professional background: role and description, department, nationality, age, seniority as well as the history of the company.
2. Can you please tell me something about the diversity management policy in this company?
3. Can you please describe your work in your department?
4. How does the policy translate concretely in this company? \*Question to a person responsible for DM
5. What does diversity/inclusion mean for you?
6. What dimensions of diversity are addressed in this company?
7. What do you think of diversity management in Poland?
8. What is the value of having the diversity policy in this company/industry?
9. Do you have a connection with other nationalities in your daily work? How does it impact your daily work?
10. How would you feel working in a culturally diverse work environment?
11. How diversity and inclusion are promoted locally? Are there any best practices shared within the Group? If not, why not? \* Question to a person responsible for DM
12. Can you provide some examples of diversity management practices?
13. Are there any diversity, equality and non-discrimination practices in HR? (recruitment, positive discrimination, trainings, mentoring, KPI's, dashboard etc.)
14. \*How the change of the owner can impact diversity management policy in this company (Question in firm A in the context of sale)

### Appendix 3. Interview guide in Polish

1. Kontekst : stanowisko i opis obowiązków, dział, narodowość, wiek, staż pracy oraz historia firmy.
2. Czy możesz opisać swoją pracę w swoim dziale?
3. Czy możesz mi coś powiedzieć o polityce zarządzania różnorodności w tej firmie?
4. Jaka ta polityka się przekłada na konkretne dokumenty? Pytanie do osoby odpowiedzialnej za Zarządzanie Różnorodnością
5. Co oznacza dla Ciebie słowo różnorodność i inkluzja (włączanie)?
6. Jakie wymiary różnorodności są adresowane w tej firmie?
7. Co myślisz o zarządzaniu różnorodnością w Polsce?
8. Jaka jest wartość dodana polityki różnorodności w tej firmie i branży?
9. Czy masz związek z różnorodnością narodowości na codzień w pracy? Jeśli tak to w jakim charakterze?
10. Jakbyś się czuł pracując w zespole zróżnicowanym pod względem narodowości?
11. Jak różnorodność jest promowana lokalnie? Czy istnieją jakieś wspólne dobre praktyki w Grupie? Jeśli nie, dlaczego nie? \* Pytanie do osoby odpowiedzialnej za Zarządzanie Różnorodnością
12. Czy możesz podać przykłady praktyk zarządzania różnorodnością?
13. Czy w HR istnieją jakieś praktyki dotyczące różnorodności, równości i niedyskryminacji? (rekrutacja, szkolenia, mentoring, wskaźniki itp.) \* Jeśli pytanie skierowane jest do członka działu HR
14. \*Jak zmiana właściciela może wpłynąć na politykę różnorodności w tej firmie? (Pytanie do pracowników firmy A w kontekście sprzedaży firmy)

#### Appendix 4. Research request in firm A, the Polish version

Wnioskodawca:  
Aneta Orlińska  
Studia doktoranckie w zakresie Nauk o Zarządzaniu  
Laboratorium Management & Organisation,  
Uniwersytet Paris-Dauphine,  
Praca doktorska pod dyktando Jean-Pierre Segal'a (CNRS)

Szanowna Pani,

Zwracam się do Pani z prośbą o możliwość przeprowadzenia wywiadów z pracownikami XX w ramach pracy doktorskiej pt. "Wdrożenie kultury organizacyjnej międzynarodowych firm w polskich oddziałach" pod dyktando Jean-Pierre Segal'a na Uniwersytecie Paris-Dauphine oraz o możliwość uwzględnienia zdobytych informacji w publikacji, z poszanowaniem anonimowości osób oraz poufności danych. Poniżej przesyłam niezbędne informacje w zakresie pracy doktorskiej oraz zakres badań. Jestem do dyspozycji, aby w razie potrzeby przekazać dodatkowe informacje uzupełniające.

Z poważaniem,  
Aneta Orlińska

Tytuł pracy : Wdrożenie zarządzania różnorodnością międzynarodowych firm w polskich oddziałach

##### **Cel naukowy**

Temat rozprawy dotyczy przekazania i odbioru « kultury organizacyjnej » spółek macierzystych w polskich oddziałach, który jest wynikiem stworzenia wspólnych wzorców, założeń biznesowych, oraz strategii zbudowanych i rozwiniętych przez Grupę. Przedmiotem moich badań jest analiza sposobu postrzegania i wdrażania wartości grupy, oraz wspólnych zasad działania w różnych obszarach, tj. odpowiedzialności społecznej biznesu, HR, różnorodności itd...).

##### **Wyniki badań**

Wyniki badań są przekazywane Spółce w formie raportów, bądź bilansu pracy, oraz ostatecznej wersji rozprawy doktorskiej, przy jednoczesnym poszanowaniu anonimowości osób oraz poufności wszelkich uzyskanych przeze mnie informacji. Doktorant może być do dyspozycji polskiej siedziby Spółki podczas badań.

##### **Potrzeby badań**

W ramach rozprawy doktorskiej, naszym celem jest zidentyfikowanie firmy, która udostępni nam dostęp do informacji oraz osób, które mogą wspomóc badania naukowe. Pierwszy etap polega na przeprowadzeniu ok. 10 wywiadów z osobami, które obecnie pracują, bądź pracowały w firmie przed procesem prywatyzacji Spółki, w szczególności polskich oraz francuskich pracowników (expatów) na różnych szczeblach hierarchii oraz posiadających różny staż pracy (idealnie osoby, które pracowały przed procesem prywatyzacji spółki, oraz nowi pracownicy z kilkuletnim stażem pracy).

## TAK WIDZIMY RÓŻNORODNOŚĆ W XXX W POLSCE

Na przełomie maja i czerwca ubiegłego roku przeprowadziliśmy kolejny raz badania na temat różnorodności w siedzibie w Krakowie, tym razem w ramach pracy doktorskiej Anety Orlińskiej pt. "Adaptacja polityk i praktyk zarządzania różnorodnością w polskich firmach" realizowanej na Uniwersytecie Paris Dauphine. Pracownicy z różnych działów na różnych szczeblach organizacji zostali zapytani m.in. o to jak rozumieją pojęcie różnorodności. Chcielibyśmy podzielić się wynikami rozmów i podziękować ekipie Compliance i Etyki oraz wszystkim osobom, które zgodziły się wziąć udział w badaniach.

Po pierwsze warto zwrócić uwagę, że pracownicy chętnie wzięli udział w badaniu. W sumie przeprowadziliśmy 30 rozmów z osobami z działów tj.: Finanse, Compliance, Komunikacja, HR, R&D, IT, Jakości, Jakości i Środowiska, Etyki, Inżynierii, Procesów Wsparcia. Pierwsze wyniki analizy badań pogłębionych są komunikowane pracownikom. Ostateczne wyniki zostaną przedstawione na początku przyszłego roku.

Na początek zapytaliśmy pracowników jak rozumieją różnorodność?

Pod pojęciem różnorodności może kryć się wiele znaczeń. Z jednej strony, pracownicy wskazują na cechy widoczne, głównie wiek, płeć oraz niepełnosprawność. Zdecydowanie mniej podkreślane są inne cechy t.j. narodowość, rasa, wyznanie, orientacja seksualna, elementy które wg większości nie mają wpływu na wykonywaną pracę, ani na kreatywność zespołów. O sukcesie może decydować integracja pomiędzy pracownikami oraz szacunek wobec odmiennych poglądów, niezależnie od wyżej wymienionych aspektów różnorodności.

Z drugiej strony, najczęściej różnorodność postrzegana jest jako zestawienie cech niewidocznych tj. doświadczenie, kompetencje, osobowość, style myślenia oraz style pracy.

Jaki wpływ różnorodności na innowacyjność?

Wg badanych cechy niewidzialne różnorodności mogą mieć większy wpływ na kreatywność i innowacyjność zespołów. Z kolei, część pracowników uważa że różnorodność kompetencji jest najważniejsza, szczególnie jeśli chodzi o kompetencje, których wymaga praca w Oddziale nr 1 w Krakowie. Biorąc pod uwagę typ sektora firmy, która jasno ustala reguły pracy i stawia na bezpieczeństwo swoich pracowników, nie wystarczy jedynie dobrać pracowników by stworzyć różnorodne zespoły. Należy efektywnie zarządzać różnorodnością.

Jakie działania należałoby wprowadzić w firmie w zakresie zarządzania różnorodnością?

Wśród zasadniczych celów dotyczących zarządzania różnorodnością wymieniono promocję różnorodności na większą skalę, tak by wiadomość firmy dotarła do wszystkich pracowników. Innym zaproponowanym przez pracowników rozwiązaniem jest większa edukacja w zakresie otwartości na różnorodność, we wszystkich jej aspektach, ze szczególnym uwzględnieniem niepełnosprawności. Jeszcze inna propozycja polega na podejmowaniu działań służących polepszeniu międzypokoleniowej wymiany doświadczeń. Ponieważ większa świadomość różnic może wzmocnić współpracę i wzajemne porozumiewanie się. Naszą uwagę przykuła

opinia jednego z respondentów : "Z jednej strony chodzi o świadome rozpoznanie kultury organizacyjnej, kształtowanie kultury akceptacji, ale przy zachowaniu poszanowania dla innych osób i wyznaczenia takich norm które są nieprzekraczalne."

Biorąc to wszystko pod uwagę, można stwierdzić, że działania na rzecz różnorodności są niezbędne, ponieważ otwartość na różnorodność jest kluczem do sukcesu i prowadzi do lepszej współpracy. Kulturę firmy tworzą głównie jej pracownicy. Większą otwartość na różnorodność niesie ze sobą lepszą atmosferę w pracy i większą satysfakcję.

#### CYTATY

"Ponieważ każdy z nas jest indywidualnością."

"Jeśli zespół jest zróżnicowany pod kątem doświadczenia to na pewno fajnie. W naszym dziale fajnie to działa bo każdy reprezentuje jakby trochę inną działkę i wydaje mi się że to jest fajne połączenie, bo każdy może wnieść jakieś własny swój pogląd."

"Różnorodność w zakresie takim ogólnym bycia sobą"

"Trzeba pamiętać że każdy jest inny, że każdy coś innego może dać i inaczej do niego trzeba podejść w pracy, i nie można wszystkich mierzyć jedną miarą. Fajnie jest też pracować z różnymi ludźmi, bo jednak zamykanie się w swoim świecie jest trochę jakby to powiedzieć nudne."

"Bardzo szerokie pojęcie bo to z punktu widzenia firmy i organizacji, ja to zawsze patrzę na różnorodność z punktu widzenia jakby swojego zespołu, to są różne formy różnorodności, możemy powiedzieć płciowa, wiekowa itd. a z innej strony możemy powiedzieć kompetencyjna różnorodność."

## Appendix 6. Example of interviews plan, firm A, 2016

| wywiady potwierdzone |                      |                                |                                                |                                                                             |                   |                |             |                      |
|----------------------|----------------------|--------------------------------|------------------------------------------------|-----------------------------------------------------------------------------|-------------------|----------------|-------------|----------------------|
| kadra zarządzająca   | długoletni pracownik | pracownik z kilkuletnim stażem | Staż pracy (do uzupełnienia podczas spotkania) | Stanowisko                                                                  | Miejsce spotkania | data spotkania | godzina     | Miejsce              |
| X                    |                      | X                              | 6 lat                                          | Dyrektor ds. Compliance - Sekretarz Generalny                               | Kraków            | 2016-08-26     | 13:30-14:30 | u Łukasza (21a)      |
|                      |                      | X                              |                                                | St. Specjalista ds. Audytu Wewnętrznego                                     | Kraków            | 2016-08-26     | 12:00-13:00 | 18A                  |
|                      |                      | X                              |                                                | St. Specjalista ds. Audytu Wewnętrznego                                     | Kraków            | 2016-08-29     | 10:00-11:00 | 18A                  |
| X                    |                      | X                              |                                                | Kierownik ds. Komunikacji                                                   | Kraków            | 2016-08-29     | 11:30-12:30 | 18B                  |
|                      |                      | X                              |                                                | Główny Specjalista ds. Administracji Personalnej                            | Kraków            | 2016-08-29     | 13:00-14:00 | 18B                  |
|                      |                      | X                              |                                                | Specjalista ds. Wsparcia Projektów                                          | Kraków            | 2016-08-30     | 09:00-10:00 | 18B                  |
| X                    |                      |                                |                                                | Kierownik ds. szkoleń                                                       | Kraków            | 2016-08-30     | 10:30-11:30 | 18A                  |
| X                    |                      |                                |                                                | Dyrektor Departamentu Procesów Wsparcia                                     | Kraków            | 2016-08-30     | 11:45-12:45 | u Beaty              |
| X                    |                      |                                |                                                | Zastępca Dyrektora ds. Zarządzania Ryzykiem i Systemami Kontroli            | Kraków            | 2016-08-30     | 13:00-14:00 | u Ewy                |
| X                    |                      |                                |                                                | Zastępca Dyrektora ds. Badań i Rozwoju,                                     | Kraków            | 2016-08-31     | 11:30-12:30 | u Henryka (pok. 225) |
|                      |                      |                                |                                                | Główny Specjalista ds. Jakości                                              | Kraków            | 2016-08-31     | 10:00-11:00 | sala 230 A (video)   |
|                      |                      |                                |                                                | Kierownik Wydziału Eksploatacji/Korespondent ds. Etyki (Oddział w Krakowie) | Kraków            | 2016-08-31     | 09:00-09:55 | A230                 |
| X                    |                      |                                |                                                | Kierownik ds. Bezpieczeństwa IT                                             | Kraków            | 2016-08-31     | 14:00-15:00 | A18                  |
| X                    |                      |                                |                                                | Członek Zarządu, Dyrektor Finansowy                                         | Kraków            | 2016-09-01     | 12:00-13:00 | 18B                  |
| X                    |                      |                                |                                                | HR Business partner                                                         | Kraków            | 2016-09-01     | 10:30-11:30 | 211                  |
| X                    |                      |                                |                                                | Kierownik Wydziału Jakości i Środowiska                                     | Kraków            | 2016-09-01     | 09:00-10:00 | 211A                 |



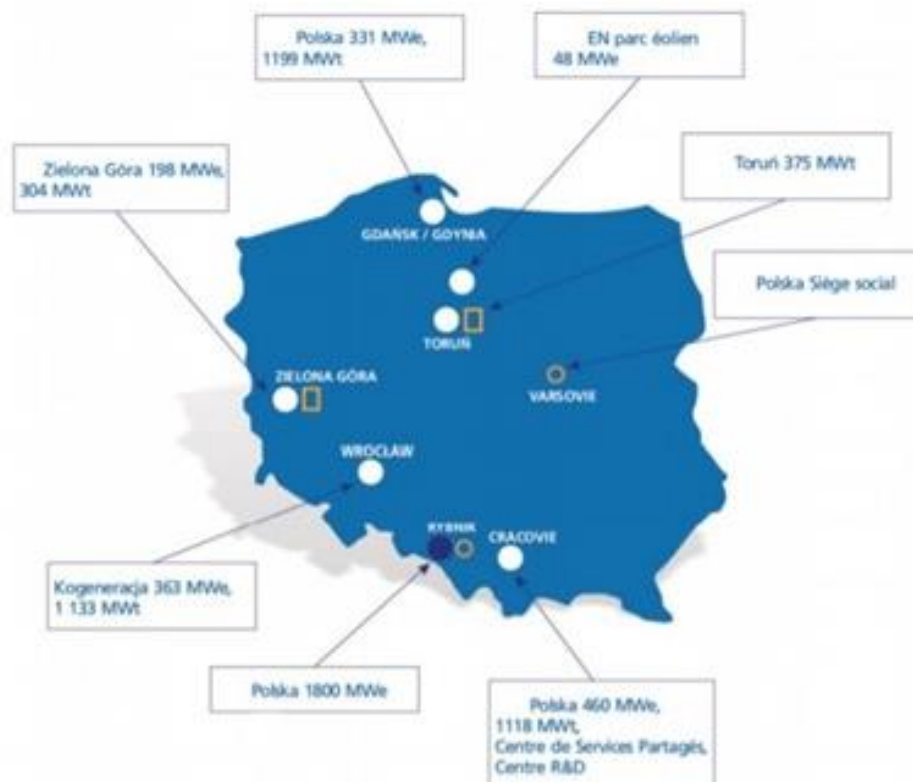
Appendix 7. Place of interviews, firm A, Cracow.



## Appendix 8. Presentation of case studies

In total, the activity of the Polish subsidiary of firm A comprises nine power plants, including the shared service centre in Cracow. The following figure presents a panorama of power plants in Poland (2014). It shows that firm A has multiple regional production sites, in relatively big cities in the country, such as Warsaw, Cracow, Rybnik, Zielona Gora, Wroclaw, Torun, Gdansk/Gdynia. Until 2017, the Polish subsidiary was the third-largest energy producer in Poland, leaving behind two state-owned companies (Reference document, 2016).

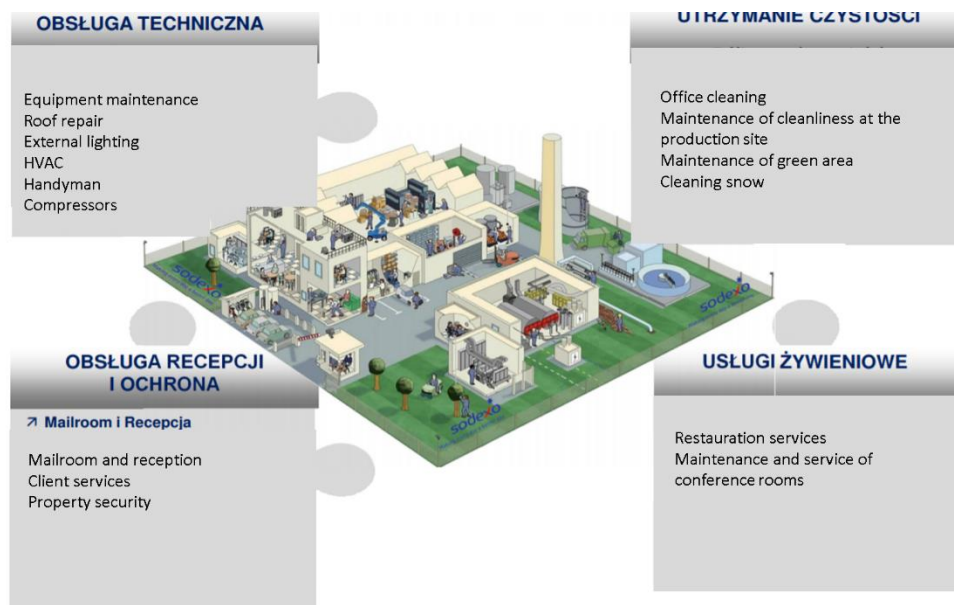
### Firm A



### Firm B

The on-site services in Poland include, among others, property management, technical service, energy management, cleaning services, food services (restaurant, catering, occasional service events). The core activity of the on-site services is to provide a wide range of operational and maintenance services on the national scale. The B&R services comprise the distribution of employee motivational services such as employee benefits, incentive initiatives, gift cards and boxes, expense management and public benefits (site web, 2017). Furthermore, firm B

manages over 400 properties as a part of on-site services and around 80 local restaurants all over the country. The following figure (The classical model of services in Poland. Source: Firm B Forum, 2012) illustrates the classical pillars of the firm's activity in Poland: Technical services, Cleaning services, Reception and Concierge, Food Services and therefore shows that building property maintenance is the critical pillar of the firm's B activity in Poland.



#### Firm C

The Polish subsidiary has six local entities based in one building in Warsaw, that provide expertise in the following areas: life insurance for private and business clients; property insurance for individual and business clients; retirement planning; global investments management; employee education and digital insurance solutions. The company has around 190 local offices in the country, based in urban and rural areas. The principal departments of the social bureau in Warsaw include: Finance Internal Audit, Insurance, HR, Communication, Business development, Market management, Actuarial department IT, Marketing & PR, Financial Reporting and Investment accounting, CRM and Direct sales, Digitalization and Client Strategy, Quality and process optimization. In 2006, the company acquired the status of European society "Societas Europaea" ruled under the EU law. Since the beginning of the nineties, firm C started international expansion in eight Eastern European countries, including Poland.

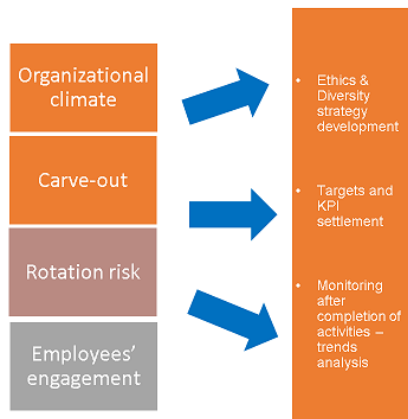
## Firm D

Firm D is committed to medical innovation in the following areas: Cardiovascular and Metabolic Diseases; Oncology; Respiratory, Inflammation, and Autoimmunity; Infection and Neuroscience and other. Poland is on a list of “Emerging Europe” countries where the company operates, including the countries of the CEE region, such as Estonia, Turkey, Kazakhstan, Albania, Serbia, Macedonia, Bosnia-Herzegovina, and Russia. The core activity of the Polish site is the Research & Development and the clinical studies. Since 2011, the parent company decided to transfer the global services from the UK to Poland and established a global Clinical Trial Centre in Warsaw which provides services worldwide. In the following years, the corporate management created the main branches: Integrated Finance Solutions, HR, Global Procurement, R&D, that serve the EMEA region. It is believed that there are two main reasons behind the investment in Poland: a cheaper workforce and highly skilled Polish experts in the medical and pharmaceutical domain.

## Appendix 9. Firm A – Diversity Management policy and practices (visual data)

Firm A

### CURRENT ORGANIZATIONAL CHALLENGES ETHICS&DIVERSITY STRATEGY



“Ethics & Diversity strategy”, Internal document, 2016



Breast cancer check, Diversity week, 2014



“Diversity cake”, Diversity week, 2014

Diversity work styles, 2016

## Diversity Week – activities 13-17 June 2016

**Main idea** – Cooperation of different behaviour styles = efficiency of teams

- Educational posters presenting main idea of Diversity Week
- Fruits for all employees with a leaflet and receipt for good relations in a team
- Newsletters and materials on diversity in the Intranet
- Diversity message together with safety message
- Workshops in localizations
- E-learning for managers
- Parental guide





## Dzień otwarty – Różnorodni i wyjątkowi

Pracownicy będą mieli możliwość skorzystać z różnego rodzaju testów na temat swojej osobowości, różnych stylów uczenia się, sprawdzić, która półkula mózgu jest u nich dominująca i dowiedzieć się jakie preferencje mają osoby o odmiennej dominacji. Dodatkowo będą mieli możliwość sprawdzić swój styl motywacyjny.



Tego dnia pracownicy będą mogli złożyć podpisy pod Kartą Różnorodności, która w grupie  obchodzi już swoje 3 urodziny

**KARTA**  
RÓŻNORODNOŚCI

 DIVERSITY.INCLUSION

Diversity Week, “Diverse and unique”, 2016



Diversity materials: Safety poster and “Wealthy week” poster

## Tableau de bord

## DIVERSITÉ &amp; INCLUSION





The global D&I Dashboard, 2015. Source: Internal document

The following picture illustrates the realistic circumstances of the local implementation in the shared service building of firm A in Cracow.



Display of the anti-stereotypes campaign in Poland, 2015



Diversity Week, Firm A in Poland, Cracow, 2014

## Appendix 10. Polish background

Map of Poland in Europe and its neighbours



Source: Google, 2019

#### Principal information

Official name: Republic of Poland

Capital: Warsaw

Major cities: Kraków, Łódź, Wrocław, Poznań, Gdańsk, and Szczecin

Neighbour countries: Lithuania, Belarus, Ukraine, Slovakia, Czech Republic, Germany, Russia

Official language: Polish

Population: Approximately 38.5 million people (98% Polish)

Major religion: 87,5 % Roman Catholic

Current main political party: PiS Law and Justice Party led by Lech Kaczyński. Prime Minister Mateusz Morawiecki is the head of the party since December 2017. The Committee for the Defense of Democracy has been created in 2015 mainly by the political opposition and European members in response to the controversial laws, such as the Judicial Reform, women's rights (abortion restriction) etc.

Andrzej Duda is the Polish president and a member of the conservative and Eurosceptic party.

#### Economic situation

Economically Poland is considered to be a developed economy with a GDP of 524.5 billion USD (2017) (growth by 5,1% in 2018) (Eurostat, 2017). GDP is expected to rise by 3.5 % in 2019 and 3.2 % in 2020 (OECD, 2019). Poland maintains high standards of living including education, economic freedom. The unemployment rate is one of the lowest in Europe of 3.5% in 2017. However, the shortage of workforce makes it difficult for employers to find the right skills

(Eurostat, 2018). Also, one of the major challenges according to the Eurostat report is a long-term talent attraction in addition to the seasonal and short-term stays.

Poland belongs to NATO since 1999 and the EU since 2004 and is a part of Visegrad group including the Czech Republic, Hungary and Slovakia. Additionally, the Polish Stock Exchange in Warsaw is the largest in Central Europe. Besides, the Polish economy is marked by an important growth due to the European funding and private investment.

Historically, Poland is known for periods of domination by other countries. The key dates:

**1918** – After IWW, the regain of national independence after 123 years of occupation.  
**1939-45** - Nazi Germany invasion, Start of the Second World War. Poland divided by Germany and the Soviet Union. Germany builds concentration camps whose names - Auschwitz, Treblinka, Majdanek - become synonymous with the Holocaust.  
**1945** - Soviet forces drive German forces from Poland, whose borders are set by Potsdam conference; Poland loses territory to the Soviet Union but gains some from Germany.  
**1947** - Poland becomes a Communist People's Republic after Soviet-run elections and subsequently joins the Soviet-run Warsaw Pact military alliance.  
**1978** - Karol Wojtyla, Cardinal of Krakow, is elected Pope.  
**1980** - Disturbances at the shipyard in Gdansk lead to the emergence of the Solidarity trade union under Lech Walesa, and the imposition of martial law.  
**1989** - Round-table talks between Solidarity, the Communists and the Catholic Church pave the way for fall of communism in Poland. Partially free elections see landslide win for Solidarity, which helps form coalition government. Tadeusz Mazowiecki becomes the first non-Communist Polish prime minister since 1946.  
**1990** - Lech Walesa elected president. Market reforms, including large-scale privatisation, are launched.  
**1991** - First parliamentary elections since fall of communism. Soviet troops start to leave.  
**2004** - Poland is one of 10 new states to join the EU.

Source: Poland, country profile, BBC

## Appendix 11. The Polish national anthem (English translation)

Poland has not yet perished,  
So long as we still live.  
What the alien force has taken from us,  
We shall retrieve with a sabre.  
March, march, Dąbrowski,  
From the Italian land to Poland.  
Under your command  
We shall rejoin the nation.  
We'll cross the Vistula and the Warta,  
We shall be Polish.  
Bonaparte has given us the example  
Of how we should prevail.  
March, march...  
Like Czarniecki to Poznań  
After the Swedish occupation,  
To save our homeland,  
We shall return across the sea.  
March, march...  
A father, in tears,  
Says to his Basia:  
"Listen, our boys are said  
To be beating the tarabans."