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CARINA STUMPF

## From the old into the new

How an international practice transfer fostered  
an organization's intercultural development

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How an international practice transfer fostered an  
organization's intercultural development

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by

Carina Stumpf



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# Deutsche Zusammenfassung der Dissertation

## Motivation und Ziel der Dissertation

“The scientific way of life is governed by three broad classes of interacting motives: *curiosity*, the desire to know what is going on when one’s back is turned, where one’s vision cannot easily reach, or where a situation is too complex for clear viewing; *practicality*, the desire that the results of one’s labors, search, and enquiry should be useful and significant, that they should ‘make the difference’; and *intrinsic orderliness*, the desire that the masses of accumulated data be reduced to a comprehensible order and that the complexities which have been unraveled in the satisfaction of one’s curiosity be not again obscured by the imposition upon the data of an arbitrary order.” (Chein et al. 1948, p. 43)

Die Autoren dieses Zitats waren eine der ersten Denker der Aktionsforschung und beschreiben sehr gut, was diese Dissertation maßgeblich motivierte: Die Neugier auf das, was in ihrem Forschungskontext beobachtbar, aber nicht sofort erklärbar war; der Drang, Forschung in einer praxisnahen Art und Weise zu betreiben und mit ihr einen Unterschied zu machen; sowie das Bedürfnis nach Ordnung und Struktur in einer komplexer werdenden Welt. Diese Dissertation will “umsetzbare” Forschung produzieren und nicht nur kurz eintauchen in die Empirie, um sich kurz darauf wieder in den Elfenbeinturm der Wissenschaft zurückzuziehen. Der Forschungskontext dieser Dissertation bot die Gelegenheit dazu im Rahmen einer Vertrags-Ethnographie (Fayard et al. 2016), die es der Autorin erlaubte über mehr als drei Jahre „im Feld“ und sogar Teil davon zu sein. Der Forschungskontext ist ein deutscher Automobilhersteller – genauer gesagt eine Organisationseinheit in der Unternehmenszentrale, die sich mit der Entwicklung und dem Transfer von Trainingsprogrammen für Handelsmitarbeiter weltweit beschäftigt. Die Promotion begann zeitgleich mit Initiierung des Transfers einer strategischen, organisationalen Praktik (Kostova 1999) in sechs Länder als Pilotprojekt mit der Absicht, diese Praktik weltweit zu implemen-

tieren. Übergeordnetes Ziel der Praktik war es, das Kundenerlebnis in den Handelsbetrieben zu verbessern, um die Marke weiter zu stärken und die Profitabilität der Händler zu steigern. In Zusammenarbeit mit den lokalen Tochtergesellschaften sollte die Praktik in den Handelsbetrieben des jeweiligen Landes umgesetzt werden. Die Autorin erhielt die Möglichkeit, die Verantwortung für den Transfer nach Spanien zu übernehmen. Dies erlaubte es ihr, den Transfer und relevante Einflussfaktoren sowie seine Ergebnisse genau zu untersuchen. Der Analysefokus lag dabei noch auf der empfangenden Organisation und nur zu einem kleinen Teil bei der Zentrale. Tatsächlich stellte sich allerdings die Transferstrategie der Zentrale als einer der wichtigsten Faktoren für den Erfolg des Transfers selbst und gleichzeitig für den weiteren Verlauf der Promotion heraus: Die Forscherin konnte Veränderungen in der Transferstrategie der Zentrale im Laufe der Zeit beobachten, woraufhin sich der Fokus der Forschung mehr und mehr auf die Haltungen und Strategien der deutschen Zentrale bzw. der Organisationseinheit gegenüber ausländischen Tochtergesellschaften im Allgemeinen sowie auf die Entwicklung derer richteten. Der Forschungsfokus verlagerte sich also von der empfangenden Organisation der transferierten Praktik und die Faktoren, die sich als für den Transfer relevant zeigten, auf die Zentrale selbst und die interkulturelle Entwicklung der Organisationseinheit. Mit letzterem ist die Veränderung der Haltung von einer ethnozentrischen – d.h. der gefühlten Überlegenheit der Muttergesellschaft und der Verleugnung kultureller Unterschiede und der damit verbundenen Annahme, dass zentrale Konzepte universell einsetzbar sind (Perlmutter 1969) – hin zu einer mehr und mehr ethnorelativeren-geozentrischen Haltung gemeint – nämlich der Akzeptanz der Unterschiedlichkeit von Kulturen, die dann sogar als positiv und bereichernd empfunden und integriert werden (Bennett 1993). Die Kombination dieser beiden Thematiken – internationaler Praktiktransfer und interkulturelle Organisationsentwicklung – im Rahmen der Dissertation war dabei im ersten Schritt durch die Analyse der ersten gesammelten Daten motiviert. Die Verbindung dieser beiden Forschungsfelder war also zunächst empirischer Natur – was in der Folge die Konsultation weiterer Literatur nach sich zog, um diese Verbindung auch theoretisch zu legitimieren.

Die Dissertation gibt also Einblicke in zwei zentrale Forschungsfelder des internationalen Managements: Zum einen behandelt sie den internationalen Transfer von Unternehmenspraktiken, ein bereits viel erforschtes Feld, zum anderen behandelt sie die Thematik der interkulturellen Organisationsentwicklung, wozu es bisher wenig empirische Forschung gibt (Barmeyer 2018).

Der erste Teil der Dissertation betrachtet den Transfer von Unternehmenspraktiken, der aus der heutigen Realität multinationaler Unternehmen nicht mehr wegzudenken und zu einem „modern business imperative“ (Chiang et al. 2017, S. 1) geworden ist. Die Fähigkeit, Praktiken zu transferieren wird als eine Quelle für Wettbewerbsvorteile gesehen (Argote/Ingram 2000; Ahlvik/Björkman 2015; Kostova 1999), da langfristiger Unternehmenserfolg vom Ideen- und Wissensfluss innerhalb der Organisation abhängig ist. Die immer weiter zunehmende Internationalisierung ebenso wie Missverständnisse und Konflikte, die beim Transfer von Praktiken entstehen, machen die Bedeutung des Forschungsfeldes umso größer (Barmeyer 2018). Organisationale Praktiken sind dabei definiert als

“particular ways of conducting organizational functions that have evolved over time under the influence of an organization’s history, people, interests, and actions and that have become institutionalized in the organization” (Kostova 1999, S. 309).

Chiang et al. (2017) geben einen Überblick über den Stand der Forschung zum internationalen Transfer von Unternehmenspraktiken und stellen fest, dass ein ganzheitliches Verständnis dieser Thematik nach wie vor nicht erreicht ist. Bisherige Forschung betrachtet das Thema aus den verschiedensten Perspektiven, wie etwa einer institutionellen (Kostova 1999) oder mit dem Fokus darauf, wie die Handlungen (Tempel/Walgenbach 2012) oder die Macht von Akteuren den Transfer beeinflusst (Ferner et al. 2011). Andere fokussieren auf Einflussfaktoren (Ahlvik/Björkman 2015; Björkman/Lervik 2007; Edwards/Molz 2014; Gamble 2003; Klimkeit/Reihlen 2016; Kostova 1999; Szulanski 1996; Tempel/Walgenbach 2012), wieder andere auf das Ergebnis bei der Empfänger-Organisation in Bezug auf die Institutionalisierung



der Praktik (Ahlvik/Björkman 2015; Björkman/Lervik 2007; Ferner et al. 2011; Kostova 1999) sowie deren Annahme oder Anpassung bzw. Rekontextualisierung (Barmeyer 2012; Brannen 2004; Edwards/Molz 2014; d'Iribarne 2012; Ferner et al. 2011; Lervik/Lunnan 2004) um eine Passung mit den lokalen Gegebenheiten zu erreichen (Fortwengel 2017).

Die Rolle der Muttergesellschaft als zentraler Einflussfaktor ist dagegen noch wenig erforscht. Neben Diskussionen zu Standardisierung/Lokalisierung (Pudelko/Harzing 2007) oder Ethnozentrismus/Ethnorelativismus (Perlmutter 1969) gibt es nur wenige Fallstudien, die sich mit der Rolle der Unternehmenszentrale (Ansari et al. 2014; Barmeyer/Davoine 2011; Fortwengel 2017; Søderberg 2015) oder mit den Akteuren, die für den Transfer verantwortlich sind und diesen beeinflussen, beschäftigen (Klimkeit/Reihlen 2016; Søderberg 2015). Gleichzeitig gibt es kaum empirische Studien, die den Prozess der Institutionalisierung entlang der Dimensionen Implementierung, Internalisierung und Integration unter die Lupe nehmen (Chiang et al. 2017). Lediglich Ahlvik and Björkman (2015) haben die Existenz dieser drei Dimensionen in einer quantitativen Studie getestet. Außerdem gibt es keine Studie, die Kontextfaktoren, Institutionalisierung und Rekontextualisierung im Rahmen von internationalem Transfer von Unternehmenspraktiken in Verbindung zueinander bringt. Das Hauptanliegen des ersten Teils dieser Dissertation ist es demnach, diese drei Perspektiven auf die Thematik des internationalen Praktiktransfers zusammenzubringen und damit die folgende Forschungsfrage zu beantworten: In welchem Zusammenhang stehen der Kontext, innerhalb dessen ein internationaler Transfer stattfindet, der Prozess der Institutionalisierung der Praktik und ihre Rekontextualisierung? Um diese Frage zu beantworten wird eine Einzelfallstudie durchgeführt, bei der der Transfer einer Praktik von Deutschland nach Spanien untersucht wird. Die Dissertation erweitert den aktuellen Stand der Forschung, in dem sie einen gesamtgesellschaftlichen Überblick über die Wechselwirkungen und Beziehungen von Kategorien bietet, die sich als für das Forschungsfeld höchst relevant herausgestellt haben.

Der zweite Teil der Dissertation trägt zum bis dato sehr limitierten Verständnis der interkulturellen Organisationsentwicklung bei (Barmeyer 2018). Interkulturelle Organisationsentwicklung beschreibt

die Entwicklung einer Organisation hin zu passenderem und effektiverem interkulturellem Verhalten, wobei auch die Strategien, Prozesse und Strukturen der Organisation eine Veränderung erfahren (Barmeyer/Mayrhofer 2016). Ziel ist es dabei, eine Organisation von einer ethnozentrischen zu einer ethnorelativen Haltung über interkulturelle Lernprozesse zu entwickeln (Barmeyer 2010). Bisher gibt es kaum empirische Forschung dazu (Malnight 1995; Muratbekova-Touiron 2008). Nichtsdestotrotz gibt es einige breit erforschte Konzepte, auf die der zweite Teil der Studie Bezug nehmen wird. Zum einen bietet das Feld der Organisationsentwicklung im Allgemeinen (French/Bell 1994; Anderson 2019) sowie die zugehörigen Konzepte organisationales Lernen (Argote 2013; Argyris/Schön 1978; Senge 1990) und Aktionsforschung (Bradbury et al. 2008; Chein et al. 1948; Cooperider/Godwin 2011; Lewin 1946; Susman/Evered 1978) eine gute Basis auch für ihre interkulturelle Ausprägung. Die interkulturelle Dimension findet ihren Niederschlag dann einerseits durch den Blick auf die Haltung von Akteuren aus der Unternehmenszentrale (Perlmutter 1996, Barmeyer et al. 2012) und auf die verschiedenen Strategien und Strukturen, die ein multinationales Unternehmen annehmen kann (Bartlett/Ghoshal 1989), andererseits durch den Begriff des interkulturellen Lernens (Bartel-Radic 2006; Bartel-Radic 2013; Thomas 2003) sowie der interkulturellen Kompetenz (Bennet 1993; Gertsen 1990). Die Studie integriert diese existierenden Konzepte und bietet damit eine Basis für das Studium von interkultureller Organisationsentwicklung sowie ein dringend benötigtes empirisches Beispiel einer tatsächlichen Entwicklung in dieser Hinsicht. Dieser zweite Teil macht – ebenso wie der erste – Gebrauch von einer induktiven und interpretativen Herangehensweise und will den natürlichen Verlauf dieser Entwicklung ethnographisch verfolgen und analysieren. Gleichzeitig wird die Autorin als Aktionsforscherin intervenieren wann immer es nötig erscheint, um die Entwicklung weiter voranzutreiben und zu fördern. Die grundlegende Frage dieses zweiten Teils der Studie ist also: Wie entwickelt sich eine organisationale Einheit interkulturell und was wirkt positiv bzw. negativ auf diese Entwicklung? Um diese Frage zu beantworten nutzt die Studie einen Aktionsforschungsansatz, der sich aus einigen geführten Reflektionen und Interventionen zusammensetzt.

Zusammenfassend will die Dissertation also zum generellen Verständnis von Internationalem Management beitragen, indem eine Organisationseinheit und ihre in Verbindung stehenden Tochtergesellschaften über drei Jahre lang begleitet werden und dabei der Fokus auf den Thematiken internationaler Praktiktransfer und interkulturelle Organisationsentwicklung gelegt wird – zwei auf den ersten Blick separate Themen, die sich jedoch als eng verbunden und einander bedingend erweisen.

### **Theoretischer Rahmen und Analysemodell**

Um einen theoretischen Rahmen für den ersten Teil der Dissertation zu schaffen, werden die drei bereits vorgestellten Kategorien jeweils unter die Lupe genommen: die Kontextfaktoren auf einer makro-, meso- und mikro-Ebene (Barmeyer 2018; Kostova 1999), der Prozess der Institutionalisierung (Ahlvik/Björkman 2015; Björkman/Lervik 2007; Kostova 1999), sowie der Begriff der Rekontextualisierung (Brannen 2004). Bezüglich des **Kontexts eines Transfers** spielt auf der *Makro-Ebene* beispielsweise die institutionelle Distanz zwischen sendendem und empfangendem Land eine Rolle, das heißt, die Ähnlichkeit und Unterschiedlichkeit der regulativen, kognitiven und normativen Komponente des sozialen Kontexts, wobei die Annahme ist, dass bei immer größerer Unterschiedlichkeit dieser Komponenten ein erfolgreicher Transfer von Praktiken immer unwahrscheinlicher wird (Clark et al. 2012; Dickmann 2003; Edwards/Molz 2014; Gamble 2003; Kostova 1999; Kostova/Roth 2002; Myloni et al. 2004; Xu/Shenkar 2002). Damit eng in Verbindung stehen die Begriffe des *home-* und *host-country effects* (Barmeyer and Davoine 2011; Edwards et al. 2007; Tempel et al. 2004), sowie die der Dominanz- und Konvergenzeffekte (Edwards and Ferner 2002). Nicht zuletzt spielt die Nationalkultur eine bedeutende Rolle auf dieser Ebene (Brannen 2004; Zaidman/Brock 2009), die gleichzeitig bereits den sozialen Kontext prägt (Kostova 1999). Auf einer *Meso-Ebene* wirken unter anderem die Transferkapazität der Zentrale (Schleimer et al. 2014), die absorptive Kapazität der empfangenden Organisation (Ahlvik/Björkman 2015; Björkman/Lervik 2007; Szulanski 1996), die strategische Haltung der Zentrale gegenüber ihren Tochtergesellschaften (Barmeyer, 2012; Bartlett/Ghoshal 1989;

Perlmutter 1969), das Standardisierung-Lokalisierung-Dilemma (Ansari et al. 2014; Pudelko/Harzing 2007), die Komaptibilität der Empfängerorganisation mit der transferierten Praktik (Kostova 1999), soziales Kapital (Björkman/Lervik 2007; Nahapiet/Ghoshal 1998) sowie Macht und Interessen ((Ferner et al. 2011) auf den Erfolg eines Transfers ein. Auf einer *Mikro-Ebene* kommen dann individuelle Akteure ins Spiel. Hier ist in erster Linie der Begriff der Transfer-Koalition relevant, der die Gruppe der Personen bezeichnet, die formal für den Transfer der Praktik zuständig ist und damit eine essentielle Rolle für das Vermarkten der Praktik gegenüber der empfangenden Organisation und für die Verbindung zwischen Sender und Empfänger einnimmt (Edwards/Molz 2014, Klimkeit/ Reihlen 2016; Kostova 1999; Søderberg 2015). Der **Prozess der Institutionalisierung** ist die zweite Perspektive, aus der der Transfer betrachtet werden soll. Er setzt sich aus den Dimensionen Implementierung, Internalisierung und Integration zusammen (Ahlvik/Björkman 2015; Björkman/Lervik 2007; Kostova 1999) und bezeichnet “the process by which a practice achieves a taken-for-granted status at the recipient unit, a status of ‘this is how we do things here’” (Kostova 1999, S. 311). Zentral für die vorliegende Dissertation ist dabei die Dimension der Internalisierung, also the “state in which the employees at the recipient unit attach symbolic meaning to the practice” (Kostova 1999, p. 311), was über die Entwicklung von *practice commitment*, *practice satisfaction* und *psychological ownership* durch die Mitarbeiter der empfangenden Organisation erreicht wird (Kostova 1999; Mowday et al. 1979; Pierce et al. 2001). Die dritte Perspektive beschäftigt sich mit dem Ergebnis des Transfers bzw. der **Rekontextualisierung der Praktik**. Beispielsweise kann eine Praktik von der Empfänger-Organisation übernommen, nicht übernommen, adaptiert oder rekonstruiert werden, je nachdem, wie die Interessen der Mutter und der Tochter gelagert sind (Edwards/Molz 2014). Zentral ist in diesem Fall jedoch der Begriff der Rekontextualisierung, also der “process by which the consumer or transferee makes sense of the product, practice, service transferred from abroad into his or her own culture” (Brannen 2004, S. 605). Dabei nehmen Aspekte der transferierten Praktik in ihrem neuen Kontext neue Bedeutungen an. Um Rekontextualisierung analysieren zu können ist daher ein Fokus auf Sprache und Semiotik

von großer Bedeutung. Gerade menschen-bezogene Praktiken – im Gegensatz zu beispielsweise Technologien, die transferiert werden, sind dabei sehr viel anfälliger dafür, im neuen Kontext nicht zu „passen“. Um einen *Fit* zwischen der Praktik und dem neuen Kontext zu erreichen ist es daher notwendig, die Praktik mit einer rekontextualisierten Bedeutung auszustatten (Brannen 2004).

Alle drei Perspektiven sollen im ersten Teil der Arbeit integriert betrachtet werden. Dafür wird ein Analysemodell herangezogen, das ursprünglich von Pettigrew (1987) zum Studium von organisationalem Wandel entwickelt wurde. Pettigrew kritisiert, dass der größte Teil der Forschung zu organisationalem Wandel bis dato auf die Veränderung selbst als Analyseeinheit fokussiert, ohne dabei den Kontext der Veränderung und deren Prozess in Betracht zu ziehen. Das Ergebnis ist die Abbildung 3, die den inneren und äußeren Kontext der Organisation mit dem Prozess der Veränderung – in diesem Fall dem Prozess der Institutionalisierung der transferierten Praktik – und dem Inhalt der Veränderung – in diesem Fall die Rekontextualisierung der Praktik – in Beziehung zueinander stellt. Da der Transfer von Unternehmenspraktiken immer auch mit organisationalem Wandel einhergeht (Björkmann/Lervik 2007; Edwards/Molz 2014; Kostova 1999; Sahlin/Wedlin 2008), erscheint es legitim, dieses Analysemodell für die vorliegende Thematik zu nutzen.

Der zweite Teil der Arbeit stützt sich theoretisch auf verschiedenste Konzepte wie organisationales (Argote 2013; Argyris/Schön 1978; Dixon 2019; Senge 1990) und interkulturelles Lernen (Bartel-Radic 2013; Bennett 1993), interkulturelle Kompetenz (Bartel-Radic 2006, Gertsen 1990; Thomas 2003), Organisationsentwicklung (Anderson 2019; French/Bell 1994; Gairing 2017), Aktionsforschung (Bradbury et al. 2008; Lewin 1946) und lernende Organisation (Senge 1990), um ein Modell aufzustellen, das als Basis und Rahmen für die nachfolgende Analyse dienen soll. Zentral hierbei ist die Unterscheidung zwischen individuellem und organisationalem Lernen, sowie die des *single-* und *double-loop learnings*. Bzgl. ersterer ist „[a]n organization’s commitment to and capacity for learning [can be] no greater than that of its members“ (Senge 1990, p. 7). Es kommt also zu organisationalem Lernen, sobald Individuen innerhalb der Organisation ein positives oder negatives Ergebnis

aufgrund vorheriger Aktion erfahren und ihr Verhalten infolgedessen entsprechend anpassen, was dann allerdings auch in das Gedächtnis der Organisation eingebettet werden muss. Ohne diesen Schritt der Einbettung bleibt das Gelernte auf individueller Ebene. Zu *double-loop learning* kommt es dann, sobald das Gelernte in der *organizational theory-in-use* Niedergang findet, die tazit und unsichtbar die organisationalen Routinen und Praktiken prägt (Argyris/Schön 1978). Man könnte hier auch von einer Art Unternehmenskultur als Produkt geteilten Lernens sprechen (Schein 2016). Eine interkulturelle Adaption des single- und double-loop learning Modells findet sich bei Bartel-Radic (2013), die *single-loop learning* als Lernen versteht, wodurch Handlungen der Organisation im interkulturellen Raum auf Basis von positiven oder negativen Erfahrungen angepasst werden, während die dahinterliegenden Werte und Annahmen die gleichen bleiben. Sobald diese jedoch hinterfragt und eine Veränderung hin zu größerem Ethnorelativismus erfahren, spricht man von *double-loop learning*. Das Konzept der Lernenden Organisation nach Senge (1990) bezeichnet dabei die ideale Natur einer Organisation, die fähig ist zu lernen und dadurch prosperiert. Prinzipien der Lernenden Organisation sind etwa systemisches Denken, Teamlernen und eine geteilte Vision. Die lernende Organisation ist dabei genauso eng verbunden mit dem Begriff der Organisationsentwicklung wie die Methode der Aktionsforschung: Aktionsforschung ermöglicht es, die Lernenden an ihrem eigenen Lernprozess teilhaben zu lassen und gemeinsam zu untersuchen, was bei diesem Prozess passiert – was eben eine zentrale Idee der Organisationsentwicklung darstellt (Schein 2000). All diese Konzepte werden in dieser Arbeit ausführlich beleuchtet und in Verbindung zueinander gebracht. Desweiteren werden für den zweiten Teil der Dissertation die verschiedenen Haltungen, Strategien und Strukturen, die in einem multinationalen Unternehmen vorherrschend sind (Bartlett and Ghoshal 1989; Perlmutter 1969) und deren Veränderung den Analysefokus des zweiten Teils darstellt, unter die Lupe genommen. Dabei sind die Führungskräfte der Organisation für die Entwicklung einer ethnorelativeren bzw. geozentrischen Haltung zentral, da sie die Strategie der Unternehmung gestalten und damit die Grundlage für die Ausgestaltung multikultureller Interaktionen schaffen (Adler 2008; Barmeyer/

Maryhofer 2016; Bartlett/Ghoshal 1987; Stahl/Brannen 2013). Außerdem beeinflussen Führungskräfte durch ihre Vorbildfunktion maßgeblich das Verhalten anderer, wie etwa dieses Zitat des ehemaligen CEOs der Renault-Nissan Alliance, Carlos Ghosn zeigt:

“Everybody has to be a manager of diversity, but especially senior executives because people always look to the top. They look at the top and say, ‘OK, is he doing what he is saying?’ If employees see top management talking about openness and learning – but they see an arrogant person who is closed down – they will not take it seriously. So the top management in a multicultural environment has an important role: They must walk the talk.” (Stahl/Brannen 2013, p. 497).

Das Thema Führung ausführlich in diese Arbeit zu integrieren würde aufgrund des enormen Umfangs dieses Forschungsfeldes ihren Rahmen sprengen. Nichtsdestotrotz soll das “Prinzip des guten Vorbilds”, wie es in Freys Prinzipienmodell der Führung (Frey et al. 2006; Peus/Frey 2009) definiert ist, eine wesentliche Rolle in der empirischen Praxis, die diese Dissertation betrachtet, spielen. Das Prinzip des guten Vorbilds beschreibt dabei das Bewusstsein auf Seiten der Führungskräfte für ihre Vorbildfunktion in sowohl menschlicher als auch fachlicher Hinsicht und basiert auf der Annahme, dass Menschen sich dann besonders engagieren, wenn es für dieses Engagement ein menschliches Vorbild gibt – das nicht nur in seiner Rhetorik für gewisse Werte steht, sondern diese auch in seinem aktiven Verhalten zeigt.

Das Ergebnis der theoretischen Hinführung der Arbeit ist ein beide Teile umfassendes Analysemodell: Der internationale Praktiktransfer, der im ersten Teil der Arbeit untersucht wird, ist dabei ein Mittel der Organisationsentwicklung und eine Möglichkeit für organisationales Lernen: Die Organisationseinheit sammelt Erfahrungen im Rahmen des Transfers, die den Anstoß für individuelles und organisationales Lernen geben, was – zumindest theoretisch – eine Veränderung von Werten, Rollen, Praktiken etc. im Sinne des *single-* und *double-loop learnings* zur Folge hat. Das Ergebnis dieser Entwicklung ist eine Änderung der Haltung von Ethnozentrismus zu Ehtnorelativismus. Die gepunkteten Boxen in Abbildung 16 nehmen Bezug auf den Einfluss der

Autorin als Aktionsforscherin und Ethnographin auf die Entwicklung, auf den im letzten Kapitel dieser Zusammenfassung näher eingegangen werden soll.

### **Forschungsdesign**

Das Forschungsdesign der Arbeit ist sehr heterogen und schwer unter eine Methode zu fassen. Einerseits kann sie als Ethnographie bezeichnet werden, da die Autorin über einige Jahre ein aktiver Teil des untersuchten Forschungskontexts war und ständig in Interaktion mit den Subjekten ihrer Forschung stand (Van Maanen 1988) und die Ergebnisse der einen Untersuchung die Fragestellungen und Natur der nächsten beeinflusste (Fayard et al. 2016). Andererseits kann die Untersuchung des internationalen Praktiktransfers, seines Kontexts, der Institutionalisierung der Praktik sowie ihrer Rekontextualisierung als klassische, qualitative Einzelfallstudie bezeichnet werden, wobei der Transfer nach Spanien den konkreten Fall darstellt (Yin 2009). Das Erforschen der interkulturellen Organisationsentwicklung im Folgenden nutzt dagegen Elemente der Aktionsforschung, wie etwa *appreciative inquiry* (Cooperrider/Srivastva 1987) und *learning history* (Roth/Bradbury 2008), wendet Methoden aus der Praxis der Organisationsentwicklung an (Gairing 2017) und greift auf qualitative Methoden zurück, wie Interviewführung und partizipative Beobachtung. Letztendlich kann die Einzelfallstudie aus dem ersten Teil der Arbeit als Teil der Diagnosephase in einem Aktionsforschungsdesign (Susman/Evered 1978) betrachtet werden, also als ein notwendiger Schritt der Recherche um Informationen als Basis für Lernen zu sammeln (Dixon 2019), um dadurch die interkulturelle Entwicklung der Organisationseinheit weiter voranzutreiben. Wie für Arbeiten aus der Aktionsforschung üblich, ist die Dissertation selbst daher aus der ersten Perspektive verfasst. Desweiteren spielt die Reflexivität des Forschers in der gesamten Arbeit eine bedeutende Rolle (Bradbury-Huang 2010; Coghlan/Brannick 2014; Haynes 2012; Sharpe 2004; Yanow et al. 2012), also die



“awareness of the researcher’s role in the practice of research and the way this is influenced by the object of research, enabling the researcher to acknowledge the way in which he or she affects both the research process and the outcomes.” (Haynes 2012, p. 72)

Das zugrundeliegende Forschungsparadigma ist das interpretative Paradigma (Burrell/Morgan 1979).

### **Ergebnisse**

Der erste Teil der Dissertation untersucht den Transfer einer Unternehmenspraktik nach Spanien aus drei verschiedenen Perspektiven: der Kontext, in dem der Transfer stattfand, die Institutionalisierung der Praktik in der empfangenden Organisation sowie ihre Rekontextualisierung. Es zeigt sich, dass der Transfer nach Spanien ein sehr positives Beispiel eines internationalen Transfers darstellt, was in der Natur der verschiedenen Einflussfaktoren begründet ist: In Bezug auf den Kontext des Transfers beeinflussen verschiedene Faktoren den Transfer in positiver Weise. Erstens ändert sich die Transferstrategie der Muttergesellschaft im Verlauf des Transfers, von einer eher ethnozentrisch geprägten Herangehensweise, die von der Erwartung geprägt ist, dass die Praktik global umsetzbar ist, hin zum Zulassen von mehr Flexibilität und sogar der aktiven Suche nach lokalen Interpretationen der Praktik. Zweitens fällt die Praktik in den spanischen Händlerbetrieben sozusagen auf fruchtbaren Boden, da sie in Einklang mit den Bedürfnissen der Mitarbeiter in einem sich schnell ändernden Bereich der Wirtschaft steht, sie gut zu den Organisationskulturen in Hinblick auf Lernbereitschaft und den Willen, Dinge auszuprobieren und zu verändern passt sowie zur spanischen Menschen- und Familienorientierung im Allgemeinen. Zu letzterem ist das Beispiel zu nennen, dass der Teamansatz, den die Praktik unter anderem beinhaltet, ganz im Gegenteil zu deutschen Befürchtungen (denn der Automobilhandel ist in Deutschland eher geprägt von Einzelkämpfern), in Spanien nie in Frage gestellt oder zu Problemen geführt hat, sondern mit offenen Armen empfangen wurde. Drittens wirkt sich die unterstützende, enge und vertrauensvolle, jedoch zu einem gewissen Teil auch hierarchische Beziehung zwischen den Akteuren der Zentrale, der

spanischen Tochtergesellschaft und der Händler positiv aus, genauso wie, viertens, das Engagement der Transferkoalition. Fünftens stellt sich heraus, dass auf einem globalen Level, *shared cognition* (Björkmann/Lervik 2007; Nahapiet/Ghoshal 1998) im Sinne des Teilens von Geschichten über erfolgreiche Transfers, Herausforderungen und Lerneffekte ein wichtiger Treiber für den Transfer der Praktik ist und sogar als eine Art Währung für die weitere Vermarktung der Praktik innerhalb der Zentrale sowie gegenüber potentiell neuen Empfänger-Organisationen betrachtet werden kann. In Bezug auf die Institutionalisierung der Praktik können alle Dimensionen im spanischen Kontext nachvollzogen werden. Die Internalisierung der Praktik wird dabei durch die Ermunterung der Coaches, Dinge aus der „Originalversion“ der Praktik auszuprobieren und gleichzeitig die Freiheit, die Praktik zu adaptieren und sie sich so zu eigen zu machen unterstützt. Die Integration der Praktik erfolgt durch sowohl Tochtergesellschaft als auch Handelsbetrieb, indem Praktiken, die in enger Verbindung mit der transferierten Praktik stehen, angepasst (etwa eine Leistungsbewertungspraktik oder Kundenbefragung) und völlig neue, unterstützende Praktiken etabliert werden (etwa ein Wettbewerb um die besten Ideen rund um das Thema Kundenerlebnis) sowie die grundlegende Idee der Praktik selbst auf benachbarte Organisationseinheiten oder –ebenen ausgeweitet wird (etwa auch auf die Werkstatt des Handelsbetriebs). Außerdem treten einige Beispiele für rekontextualisierte Bedeutungszuschreibungen der Praktik zu Tage, die alle in der Familien- und Sozialbeziehungsorientierung der spanischen Kultur begründet sind. All diese drei Perspektiven bedingen dabei einander: Die Institutionalisierung der Praktik in den untersuchten Handelsbetrieben ist erst aufgrund der förderlichen kontextuellen Faktoren möglich, wie etwa des großen Engagements der Transfer Coalition, sowie durch die Rekontextualisierung der Praktik, um sie mit lokalen Verhältnissen und Bedürfnissen in Einklang zu bringen – dies wiederum trägt indirekt zur Veränderung der Transferstrategie der Muttergesellschaft bei. Mit der Analyse in diesem ersten Teil der Arbeit zeigt sich, wie sinnvoll eine Betrachtung des Phänomens internationaler Praktiktransfer aus verschiedenen Blickwinkeln ist um es in seiner ganzen Komplexität zu verstehen.

Der zweite Teil der Arbeit verfolgt und fördert die interkulturelle Organisationsentwicklung der transferierenden Organisationseinheit. Dabei ist eine erste wichtige Erkenntnis, dass der internationale Transfer der Praktik diese Entwicklung maßgeblich in Gang setzt. Dies sowie die Ergebnisse der Untersuchung der Interkulturellen Organisationsentwicklung lassen sich in Abbildung 45 darstellen.

Die untersuchte Organisationseinheit entwickelt – ausgehend von einer ethnozentrischen Einstellung gegenüber ausländischen Tochtergesellschaften – eine mehr und mehr ethnorelativere Haltung über einen interkulturellen Lernprozess auf individueller und organisationaler Ebene, der durch das in Teil 1 untersuchte Praktiktransferprojekt angestoßen wird. An dem ethnozentrischen Ausgangspunkt verhält sich die Organisationseinheit noch als „Lehrer“ gegenüber den Tochtergesellschaften, kommuniziert tendenziell nur in eine Richtung und legt großen Wert auf die Umsetzung zentral entwickelter Trainingskonzepte. Im ethnorelativen Ergebnis dagegen, versteht sich die Organisationseinheit eher als Impulsgeber, möchte in einen Dialog treten, zuhören und helfen – was eine völlig neue Haltung darstellt. Die Erfahrungen, die in dem Transferprojekt gemacht wurden, sind neu, umfassen Erfolge und Misserfolge und die Folgen von getroffenen Entscheidungen sind für die Teammitglieder direkt beobachtbar, was für das Lernen grundsätzlich förderlich ist (Argote 2013; Senge 1990). Das Lernen auf individueller Ebene wird durch eine schon weit ausgeprägte interkulturelle Kompetenz, Offenheit, bereits gesammelter internationaler Arbeitserfahrung sowie ständige interkulturelle Interaktion im Arbeitskontext positiv geprägt. Während das Lernen auf organisationaler Ebene erst in der erzwungenen Anpassung der Transferstrategie ihren Ausdruck findet (single-loop learning), kommt es dann zur aktiven Suche nach kultureller Diversität in der Ausgestaltung der Praktik sowie zur Schaffung einer Team- bzw. Projektkultur und neuen, ethnorelativen Herangehensweisen an traditionell ethnozentrische Praktiken wie etwa der geozentrischen Gestaltung einer internationalen Trainingskonferenz (double-loop learning). Die Boxen mit den blauen Pfeilen verweisen auf Effekte, die für die weitere Entwicklung hinderlich sind bzw. Herausforderungen darstellen. Beispielsweise ist die Heterogenität der Tochtergesellschaften verantwortlich für ein empfundenes

Standardisierung-Lokalisierungs-Dilemma, dessen Lösung für die zentrale Organisationseinheit zum Teil nicht vorstellbar ist. Einen sehr viel höheren Einfluss haben dagegen die Umbrüche in der Automobilindustrie im Allgemeinen, die tendenziell bewährte Verhaltensweisen befördern und den Blick auf Neues verstellen, der Wechsel in der Führung der Abteilung sowie die Tatsache, dass Teammitglieder, die zentral für das Lernen der Organisationseinheit waren, die Abteilung verlassen. Letztendlich erfährt die so positiv und auf immer effektiveres interkulturelles Handeln zulaufende Entwicklung eine Umkehr. Daraus ist zu schließen, dass die Einbettung des Gelernten in die *theory-in-use* der Organisation (Argyris/Schön 1978) noch nicht vollständig erfolgt war.

Nichts desto trotz stellt die vorliegende Arbeit ein dringend benötigtes Beispiel einer interkulturellen Organisationsentwicklung dar, indem sie ihren Verlauf und wesentliche Wirkfaktoren untersucht und benennt. Sie sieht jedoch auch weiteren Forschungsbedarf in Hinblick auf weitere entwicklungsförderliche und -hinderliche Einflüsse, sowie auf die wirkliche *interkulturelle* Entwicklung, d.h. mit dem gleichzeitigen Fokus auf Mutter- und Tochtergesellschaften, was von dieser Dissertation lediglich angerissen werden kann.

### **Einfluss der Aktionsforscherin**

Ein besonderes Merkmal dieser Dissertation ist ihr Forschungsdesign wie es oben bereits beschrieben wurde. Dabei ist es die grundlegende Idee der Aktionsforschung, in Kooperation *mit* der Praxis Dinge zu bewegen und nicht nur Forschung über die Praxis zu betreiben (Bradbury 2010). Wie genau das Forschungsfeld durch die Forschung selbst und die Interventionen im Rahmen des zweiten Teils der Dissertation beeinflusst wurde, skizziert Abbildung 46. Durch die Einzelfallstudie im ersten Teil war es möglich, direktes Feedback von der Umsetzung der Praktik an die Muttergesellschaft zurückzuspielen und damit Informationen als Basis für Lernen zu sammeln. Desweiteren bot die Autorin durch Interviews und Workshop-Interventionen Reflektionsräume, was wiederum maßgeblich für das Lernen und die Entwicklung daraus ist. Außerdem agierte die Autorin ständig und in der Förderung von organisationalem Lernen im Besonderen als *intercultural promotor*,

indem sie eine interkulturelle Perspektive auf die Arbeit der Abteilung zur Verfügung stellte, Vorschläge machte und Versuche für eine andere, ethnorelativere Art der Zusammenarbeit mit den internationalen Töchtern anstellte.

Trotzdem braucht es das richtige Zusammenspiel unzähliger Einflüsse, um die Entwicklung einer Organisation im interkulturellen Sinne wirklich stattfinden zu lassen. Der Beitrag als Aktionsforscherin konnte dabei nur eine von vielen Stellschrauben sein. Beruhigend ist da Perlmutter's (1969) Aussage von vor über 50 Jahren, dass die "route to pervasive geocentric thinking is long and tortuous" (S. 16) und nicht innerhalb kürzester Zeit bewältigt werden kann.

# 1 Introduction

## 1.1 Motivation and context

“The scientific way of life is governed by three broad classes of interacting motives: *curiosity*, the desire to know what is going on when one’s back is turned, where one’s vision cannot easily reach, or where a situation is too complex for clear viewing; *practicality*, the desire that the results of one’s labors, search, and enquiry should be useful and significant, that they should ‘make the difference’; and *intrinsic orderliness*, the desire that the masses of accumulated data be reduced to a comprehensible order and that the complexities which have been unraveled in the satisfaction of one’s curiosity be not again obscured by the imposition upon the data of an arbitrary order.” (Chein et al. 1948, p. 43)

What the authors of this statement describe here, encapsulates very well the motivation that guided this thesis: Curiosity certainly was a main driver for the thesis as a whole. First, I myself as well as the organizational context I was conducting research for, was curious about why an international transfer of a particular organizational practice had such a different shape and outcome across the various cultural contexts, about which factors were responsible for this heterogeneity and how the transferred practice can really become the “new normal” within its new context. The first main research focus of the study was born from curiosity about events that happened in its practical context. After this curiosity was satisfied to some extent, the results from this first research endeavor as well as my ongoing participant observation reasoning revealed a second interesting research focus which attracted my curiosity: the intercultural organizational development my context, an organizational subunit in this case, went through during and after the investigated practice transfer. I also managed to satisfy this second curiosity, at least to some extent. Second, the practicality of research results is another motivation that is particularly true for the present thesis. As the research foci and questions were born from the actual practical context of the study, the results were highly relevant for the practitioners I worked with. To

some extent, the results from the first inquiry into the international practice transfer as well as my mere presence as an ethnographic and action research oriented researcher made the difference in that it contributed to the sub-unit's development from ethnocentric to ethnorelativistic attitudes and strategies. And third, intrinsic orderliness drove the present research endeavor in so far as the complexity I encountered in the field was tremendous and just needed to be cleared up in order to provide broader access to my study for the scientific world without blinking facts or events for the sake of reduced complexity – which is a particularly challenging task.

All that already shows how high my involvement was as a researcher in the practical context and how well Chein et al.'s (1948) – being talking about action research – statement fits with my own motives. All in all, I wanted to engage in actionable research and didn't want to be the researcher who steps in, conducts interviews and disappears again. My research context offered me this opportunity by agreeing to a contract ethnography (Fayard et al. 2016) which allowed me to actually be in the field full-time. The research context is a German automotive manufacturer and more specifically a sub-unit of its headquarter (HQ) which is engaged in developing and transferring training programs internationally for automotive retail staff. At the point in time when my doctorate started, the department was about to start transferring a strategic organizational practice (Kostova 1999) to six countries as a pilot before rolling out the practice worldwide. I was able to assume the responsibility for the transfer of the practice to Spain which allowed me to deeply investigate the factors that interact in this transfer process and how this interaction leads to certain transfer results. The focus therefore laid on the recipient units and only to a little extent on the HQ. However, the HQ transfer strategy applied in the transfer proved to be of major importance for the transfer itself as well as for further development of the study in that its change fostered my curiosity to further take a look at the HQ sub-unit's attitudes and strategies towards subsidiaries and their development over time. Thus, my focus shifted from the recipient unit of the transferred practice and the interacting factors within the transfer to the HQ itself and its intercultural organizational development. The combination of these two broader topics, international practice transfer

on the one hand and intercultural organizational development on the other, was triggered by the data I collected, i.e. the link between them was first of all an empirical one which in turn triggered further research into the literature in order to legitimate this link also theoretically.

## 1.2 Aims of the study

The study therefore aims at investigating two broader fields of international management: international practice transfer, a topic where already a lot of research was undertaken, and intercultural organizational development, a topic that has not gained much attention so far (Barmeyer 2018).

Transferring practices from one business unit to another is on every multinational company's (MNC) agenda and has become "a modern business imperative" (Chiang et al. 2017, p.1). The capability to transfer practices is seen as a source of competitive advantage (Argote/Ingram 2000; Ahlvik/Björkman 2015; Kostova 1999) as long-term business success is highly dependent on the flow of ideas and knowledge. Increasing internationalization as well as misunderstandings and conflicts that frequently occur when it comes to practice transfer are highlighting the importance of the topic even more (Barmeyer 2018). Organizational practices are defined as

"particular ways of conducting organizational functions that have evolved over time under the influence of an organization's history, people, interests, and actions and that have become institutionalized in the organization" (Kostova 1999, p. 309).

Chiang et al. (2017) provide an extensive summary of literature on the issue of practice transfer and state that – despite the big amount of studies on this topic – there is still a need for a more holistic and encompassing understanding of practice transfer. A lot of effort was undertaken to study the issue from a variety of different perspectives like an institutional one (Kostova 1999), a focus on how agency (Tempel/Walgenbach 2012) or the power of actors involved influence the trans-



fer (Ferner et al. 2011). Some studies focus on a variety of influencing factors (Ahlvik/Björkman 2015; Björkman/Lervik 2007; Edwards/Molz 2014; Gamble 2003; Klimkeit/Reihlen 2016; Kostova 1999; Szulanski 1996; Tempel/Walgenbach 2012), others on the outcomes at recipient unit level in terms of the practice' institutionalization (Ahlvik/Björkman 2015; Björkman/Lervik 2007; Ferner et al. 2011; Kostova 1999) and its adoption or adaptation respectively recontextualization (Barmeyer 2012; Brannen 2004; Edwards/Molz 2014; d'Iribarne 2012; Ferner et al. 2011; Lervik/Lunnan 2004) to increase its fit with local circumstances (Fortwengel 2017).

Literature is still scarce, first, when it comes to the HQ's role as contextual factor on both organizational and individual level. Apart from discussions about standardization vs. localization (Pudelko/Harzing 2007) or ethnocentrism vs. ethnorelativism (Perlmutter 1969), there are only few case studies concerned with the HQ's role (Ansari et al. 2014; Barmeyer/Davoine 2011; Fortwengel 2017; Söderberg 2015) or with how the group of people who is in charge of the transfer influence it (Klimkeit/Reihlen 2016; Söderberg 2015). Second, Chiang et al. (2017) call for more studies which are taking the process of institutionalization into account by studying the practice' *implementation*, *internalization* and *integration* within the recipient unit. So far, only Ahlvik and Björkman (2015) have tested the existence of these dimensions in a quantitative study. And third, to the best of my knowledge, no study has been concerned so far with relating contextual influences on the transfer with the practice' institutionalization and recontextualization. The first major purpose of this thesis therefore is to bring these three important categories together, providing an answer to the following research question: How are the practice transfer's context, the process of the practice' institutionalization and its recontextualization interrelated? In order to answer this question, a single case study is undertaken which investigates in detail the transfer of the practice to three Spanish dealerships.

By answering this question, the study advances current literature by bridging all three categories. It is thus contributing to a better and more holistic understanding of the interrelationships of categories that have proven to be relevant in international practice transfer, provides an answer to the "need for a more integrated and holistic view" (Chiang

et al. 2017, p. 2) and shows the “value of conceptual bricolage” (Gamble 2010, p. 705). Additionally, by applying an adapted framework that originates from organizational change research (Pettigrew 1987) the study also contributes by promoting a new way of structuring research on that topic.

The second major aim of the study is to contribute to the very limited understanding of an organization’s intercultural development (Barmeyer 2018). Intercultural organizational development describes the development of an organization towards more effective and appropriate intercultural behavior which involves changes in its strategies, processes and structures (Barmeyer/Mayrhofer 2016). The main goal of intercultural organizational development is moving an organization from an ethnocentric to an ethnorelativistic attitude through intercultural learning (Barmeyer 2010). So far, almost no empirical research has been conducted that is specifically concerned with this topic – with some exceptions that go into that direction to only some extent (Malnight 1995; Muratbekova-Touron 2008). However, there is a number of related, existing concepts this study is able to draw upon. On the one hand, the field of organizational development (French/Bell 1994; Anderson 2019) and its inherent concepts of organizational learning (Argote 2013; Argyris/Schön 1978; Senge 1990) and action research (Bradbury et al. 2008; Chein et al. 1948; Cooperider/Godwin 2011; Lewin 1946; Susman/Evered 1978) may give guidance also for its intercultural manifestation. The intercultural dimension can then be brought in by looking at the HQ stakeholders’ attitudes towards international subsidiaries (Perlmutter 1996, Barmeyer et al. 2012) and the different strategies and structures MNUs may take on (Bartlett/Ghoshal 1989) on the one hand, as well as the notion of intercultural learning (Bartel-Radic 2006; Bartel-Radic 2013; Thomas 2003) and intercultural competence (Bennet 1993; Gertsen 1990) on the other. By integrating all these existing concepts into a theoretical basis, this study aims at providing, first, a conceptual grounding for studying intercultural OD as well as, second, an urgently needed empirical example for an actual intercultural OD. Using an inductive and interpretive approach, the study aims at ethnographically observing and analyzing the natural flow of the development without trying to squeeze it into a priori defined concepts and at

intervening as an action researcher whenever it seems needed in order to further foster the ongoing development. The guiding question of this second focus of the study therefore is: How does a sub-unit's intercultural development proceed and how can this development be further facilitated? In order to answer this question, the second half of the study can be termed an action research endeavor which is composed of several guided reflections and interventions.

As a whole, this dissertation aims at shedding more light on the functioning of international management by accompanying a HQ sub-unit and its subsidiaries for more than 3 years as an ethnographer and action researcher and placing two, yet interrelated foci on the topics international practice transfer and intercultural organizational development. The perspective applied during the whole research process is an interpretive one that is viewing the world as socially constructed and dynamic, culture and human interactions being a complex, yet beautiful mystery that can be approached by deeply diving into and engaging with it.

### 1.3 Organization of the study

In order to reach the aims of the study, this dissertation is structured as follows: First, in order to provide an overview of the state of research in both the field of international practice transfer and intercultural organizational development, chapter 2 and 4 are dedicated to them. Chapter 2, thus, engages with three possible perspectives a researcher may take on when thinking of and researching on international practice transfer, namely, the context within which the transfer takes place and influences it on different levels, the process of institutionalization and the recontextualization of the transferred practice at the recipient unit. The overview of the state of this field therefore follows the idea of Pettigrew (1987) who stated that change – the transfer of a practice naturally implies a change at the recipient unit – may not be looked at without taking its context, its process and its content into account. Chapter 2.4, then, subsumes these three perspectives in one model. Before then turning to the second thematic field of the study, Chapter 3 provides

a short digression about a constructive view on culture. Considering culture as a chance and source for innovation and development (Adler 1980) is a grounding assumption of the thesis as a whole. This chapter fits well in between the two chapters on the thesis' two main topics because the change in understanding culture more and more as a resource is one major aspect of both the theoretical and the empirically observed development from ethnocentrism to ethnorelativism. Chapter 4, then, engages in designing a conceptual grounding for investigating the intercultural OD by reviewing important related concepts such as organizational learning and OD in general, intercultural learning and ethnocentrism, polycentrism and geocentrism in particular before linking the two main topics of the thesis in chapter 5. A holistic conceptual framework is presented at this stage. Chapter 6 displays the research design that is characterized by an ethnographic single case study and an action research approach. This approach is based on my ethnographic involvement in the field and also involves qualitative data collection methods. The researcher's reflexivity will be a topic here as well as my paradigmatic orientation. Chapter 7 is dedicated to the analysis of the data collected within the two research phases. 7.1 is structured along the three perspectives applied and concludes with a summary. Chapter 7.2 is divided into the three time periods *learning and reflection*, *consolidation and internationalization* and *the turnaround*, following the temporal bracketing approach proposed by Langley (1999). This chapter equally concludes with a summary. The concluding chapter 8 above all summarizes the main empirical insights and contributions of the study as well as a reflection on my own impact on the research context and the findings themselves as an ethnographer and action research. Limitations, practical implications and the conclusion complete this last chapter.



## 2 International Practice Transfer – State of the Field

International practice transfer is not a new topic in international business. Empirical research into cross-national transfer of organizational practices was fostered by the increasing export of Japanese practices to foreign subsidiaries of Japanese multinationals starting in the 1980s (Schmitt/Sadowksi 2003). Chiang et al. (2017) review the literature and research on the international transfer of HR management practices and synthesize five main questions that have been asked so far: Researchers engaged in investigating the rationale behind transferring practices, what roles the sending and recipient unit played within the transfer, what factors positively or negatively impacted the transfer, what kind of practices were transferred and ultimately, how the national context influenced the transfer. Practices can be transferred forward, i.e. from the HQ to subsidiaries or reverse, i.e. from the host to the home country (Edwards 1998) as well as horizontal, i.e. between subsidiaries (Chiang et al. 2017) which is rather rare (Barmeyer 2018). Practice transfer is always associated with the transfer of knowledge which is a neighboring area of research and is not intended to be of great interest here. Rather, the understanding of knowledge being encapsulated in organizational practices (Barmeyer 2018) and that this knowledge can be tacit or explicit and thus more or less difficult to be shared and transferred internationally is taken into account (Maimone 2018).

Although much research already has been conducted in this field, Chiang et al. (2017) detect several areas for future research. This study is intending to contribute to some of these: First, the reviewers call for integrating established theories by e.g. an analysis on multiple levels. This thesis will take the institutional or macro level as well as the organizational and individual level into account. The integration of these three levels contributes to a contextualized investigation of the phenomenon and holds the assumption that, on the one hand, the macro context influences both the organizational and individual level and on the other hand, all three levels equally influence each other and therefore need to be considered holistically (Barmeyer 2010; 2018). Addi-

tionally, this thesis will draw on established concepts like institutionalization including its three dimensions implementation, internalization and integration – another stream of future research, Chang et al. (2017) call for – and recontextualization in order to provide an even more holistic view on a particular transfer project. Second, they also call for longitudinal studies which allow to take a look at the whole process of transfer, i.e. including the events that happened before, during and after the transfer. The present study draws on multiple data from a period of more than three years and is thus able to witness the before-transfer phase, the actual transfer phase and to observe the dynamics after the transfer was officially completed.

The subsequent chapters are organized as follows: First, the literature on contextual factors on a macro, meso and micro level and their impact on the transfer process and outcome is summarized. Second, the process of institutionalization involving the dimensions implementation, internalization and integration is described. And third, the potential outcomes of the transfer at recipient unit level that the literature as discussed so far are shown, having a special focus on the concept of recontextualization.

The reason why I'm intending to investigate the transfer from such a great variety of perspectives and conceptual lenses is not just because of the willingness to close research gaps, advance current research in the field and mark an important contribution. I am also benefiting from my position in the field as being actively involved in the daily work of the organization which actually allows me to take on these different perspectives. In fact, the complexity and multifaceted nature of international practice transfer I encountered in organizational reality does not seem to allow any other approach than that or in other words: To grasp organizational reality in its complex nature, it is simply necessary to integrate various perspectives in order to provide a realistic picture of the phenomenon under study. In the following, thus, all these perspectives, that were found to be useful from both theoretical as empirical considerations, are outlined.

## 2.1 Contextual factors

Kostova (1999) conceptualizes the contextual factors which influence the transfer of organizational practices on a macro or social context (the regulatory, cognitive and normative framework of the country), meso or organizational context (recipient unit's organizational culture) and micro or relational context level (commitment, identity and trust of the transfer coalition). The interaction of these three levels is particularly important when studying intercultural events, just like Barmeyer (2018) describes in his "Passauer Drei-Ebenen-Modell" (p. 92). In the following, important contextual aspects shall be displayed and structured along these three interacting levels of analysis.

### 2.1.1 Macro level factors

Basic for understanding macro level factors that influence the transfer of practices and its outcomes is the fact that organizations are highly influenced by their institutional environment and vice versa (Rosenzweig/Singh 1991). DiMaggio and Powell (1983) are the first to ask why organizations are becoming more and more similar to each other once an organizational field matures. They introduce the notion of competitive and institutional isomorphism and posit that isomorphism is the driver for the resemblance of organizations which are operating within the same environment as "organizational characteristics are modified in the direction of increasing compatibility with environmental characteristics" (p. 149). Isomorphism makes companies incorporate elements for the sake of legitimacy even if they are not in line with efficiency goals, employ external or ceremonial assessment criteria, like, for instance, the assignment of externally defined worth to non-producing departments like advertising and makes them dependent on external institutions in order to keep being stable and secure, e.g. unions or coalitions with other organizations. All that helps gaining legitimacy and therefore is mandatory for the organization's success and survival (Meyer/Rowan 1991, p. 49ff). Rosenzweig and Singh (1991) further elaborate, that in a multinational corporation, subsidiaries will, on



the one hand, tend to adapt to the local environment and by doing that more and more resemble the other local organizations while on the other hand, they also face the pressure for consistency within the subsidiary network, thus, tend to resemble the subsidiaries in other countries. The latter pressure is provoked by the organization's tendency to replicate proven organizational structures and processes from the HQ when setting up a subsidiary as well as by the inherent need to control foreign operations. Several factors may influence the structure and processes of a subsidiary like the legal and regulatory constraints, whether the company is operating in a multidomestic (e.g. consumer goods) or global industry (e.g. automotive) or the nature of the parent country culture. This neoinstitutional perspective is taken up by a great variety of authors who investigate, for instance, how the institutional distance between the sender and recipient country, i.e. the similarity or dissimilarity of the regulatory, cognitive and normative components of the respective social contexts (Clark et al. 2012; Dickmann 2003; Edwards/Molz 2014; Gamble 2003; Kostova 1999; Kostova/Roth 2002; Myloni et al. 2004; Xu/Shenkar 2002) influence the transfer of practices. Most of them view different institutional host country environments as a constraint. Only few take on a positive perspective by drawing on strategic opportunities, a company might realize when encountering different institutions during practice transfer (Clark et al. 2012) or even shape these institutions to their advantage (Uzunca et al. 2018). In line with the institutional perspective, others examine how different national business systems, a notion primarily shaped by Whitley (1999), influence the transfer. Dickmann (2003), for instance, compares the German, British and Spanish business system with regard to their long-termism, management-employee co-operation and patterns of training and education in order to reveal important environmental factors that influence the transfer of HR management practices within the respective countries. Closely related to the notion of national business systems are the country-of-origin and host-country effect which again draws on the balance of first, trying to achieve consistency by imposing own, home-country infused approaches and second, adapting to the local institutional context (Tempel et al. 2004). Tempel et al. (2004) compare the US and German, French and British business system and how they

influence the approach of transferring HR management practices in terms of the country-of-origin and host-country effect. While US multinationals tend to impose own HR practices on foreign subsidiaries, their European counterparts grant more flexibility in this regard. Their practices nevertheless show a certain country-of-origin effect in some aspects. For example, the German dual education system influences the attitude towards training and further development practices of German multinationals in so far as they invest a lot in the HR development in foreign subsidiaries – although knowing that the institutional requirements in other countries are not necessarily supporting a similar approach like in Germany. Edwards et al. (2007) also show how a US multinational tends to centralize employment practices which are strongly influenced by the American business system that, for instance, promotes diversity and internal labor markets. Subsidiary actors, nevertheless, do have a certain space of action and may influence the exact design of practices by drawing on local institutions, thus making use of the host-country effect. Similarly, Barmeyer and Davoine (2011) show in their analysis of the transfer of a code of conduct from the US to its French and German subsidiary how this value-infused, US practice entered an area of great tension when encountering German and French values. Although it guides international behavior of multinationals, the country-of-origin effect is not to be seen as an enduring, set fact. Rather, with increasing international activities, multinationals might learn from their foreign subsidiaries and even adopt practices from them. Thus, the effect might lose its influence over time (Edwards/Ferner 2002). Schmitt and Sadowski (2003) take on an economic perspective in their analysis of home- and host-country effects when they state that country-of-origin effects are likely when the costs for a decentralized approach are high, e.g. when economies of scale cannot be realized or costs of differentiation are rising due to missing internal consistency. On the other hand, host-country effects may prevail when there are costs of decision-making, costs of violating regulations and norms of the host country or costs due to frustration within local subsidiaries when local preferences aren't met. Asking the same question of how the embeddedness of multinationals in their home country informs their approach in other countries, Edwards and Ferner (2002)

add two other effects to the previously discussed country-of-origin and host-country effects: The dominance effect results from strong economic performance of one country which triggers the transfer of technological and management features that made this success possible to other parts of the world – one could call them “fashionable management ideas” (Sahlin/Wedelin 2008, p. 220) organizations want to imitate because of their success in other organizations. An example would be the mass production and division of labor practices that spread from the US to Europe or the Japanese success in lean production which informed production lines in Japanese subsidiaries (Westney/Piekkari 2019). D’Iribarne et al. (2020) highlight the practice of management by objectives as the core American idea of good and effective management which was replicated worldwide. The notion of “best practices” is closely related to this effect, as these practices are associated with very successful companies from dominant business systems. Geary et al. (2017), for instance, show that companies originating from a country like Brazil, “in the absence of a rich repository of indigenous managerial expertise” (p. 194), draw on international best practices from the dominant US business system when managing their international affiliates. Similarly, Yousfi (2011) analyzes how the introduction of – at first sight – fairly American “best” management practices contributed to a Tunisian company’s outstanding success while simultaneously dropping traditional, local methods. A closer investigation revealed that these American practices merged with prevailing, local meanings, giving birth to a new, negotiated culture. Further, Edwards and Ferner (2002) see that there is a pressure for integrating international operations due to converging consumer tastes and deregulated product markets, which would be a fourth institutional effect on multinationals’ activities. Almond et al. (2005) are able to trace back all four institutional forces in their study of the HR policies of an US multinational in four European countries, but also highlight that such an institutional analysis needs to be dynamic, in the sense that business systems are not fixed but can change and evolve, and multilevel, in the sense that it’s not just external institutions that shape the company’s international activities, but also internal political processes play a major role. Thus, “institutional influences leave a degree of ‘social space’ that organizational actors can exploit.

Institutional forces shape but do not determine the way that MNCs function” (p. 301). The great focus on institutions within new institutionalist studies on international practice transfer is what Tempel and Walgenbach (2005) criticize as well when they are saying that most research considers adaptations as necessarily resulting from host-country institutional pressures but do not account for subsidiary actors’ role in that. The determinism of taking on an institutional perspective is also criticized by Edwards et al. (2007) as – when taken on as the only perspective – it is not necessarily explaining why firms and their practices are not in accordance with institutional norms. The authors therefore integrate a micro-political approach in their study on the transfer of employment practices from the US to Great Britain in order to simultaneously account for organizational actors’ impact.

National culture as a major influencing factor on a macro level within international practice transfer is only implicitly relevant in these neo-institutional approaches. However, knowledge inherent in organizational practices is socially produced and is, thus, subject to the influences of the context where it is produced in. Zaidman and Brock (2009), for instance, show that the actual way of how knowledge is transferred in multinational companies is influenced by hierarchical versus egalitarian structures of the respective, local society. Brannen (2004) investigates the internationalization of the Walt Disney Company and also finds that the sociocultural contexts involved in an international transfer are highly influential and that it is particularly necessary – in order to get to the ground of the specific impact of culture – to look at language and semiotics as a key aspect of the cultural context. She develops the notion of recontextualization as a central aspect of international transfer which shall be presented in chapter 2.3 in more detail. Similarly, d’Iribarne et al. (2020) place great emphasis on the role of language and meaning when studying cultures and dedicate a chapter to the differences in meanings associated to work-related vocabulary such as teamwork, management or compromise. Thus, whenever cultures interact, which is the case in international practice transfer, it is essential to consider language and meanings associated with words. The authors introduce a new way to look at cross-cultural management by stating that, despite the apparent homogenization of management practices,

the cultural diversity from which these practices are made sense of in each specific context is big now as before. Therefore, the cultural context that comes into play within international practice transfer shall not only play a marginal role and will become especially relevant again in 2.3.

Kostova (1999) conceptualizes the macro or social context within which practice transfer occurs as institutional distance between home and recipient country, comprised of a regulatory, cognitive and normative dimension instead of the formerly more culture-oriented perspectives. Culture, in her approach, is inherent to all three dimensions, in the sense that the normative dimension refers to values and norms prevalent in a society, in that the cognitive dimension stands for categories and frames of reference widely held by individuals and in that the regulatory dimension describes rules and laws which promote and sanction perceived good and bad behavior respectively. She further posits that the higher the institutional distance is between sender and recipient country, the more difficult is it to transfer successfully. This argument is contrasting the results of a study by Vo and Stanton (2012) who show in their study of the transfer of four US and one Japanese company to their Vietnamese subsidiaries that a transfer can be successful despite a big institutional distance. The same accounts for Gertsen and Zølner's (2012) study on the transfer of corporate values from a Danish HQ to its subsidiary in Bangalore.

Thus, when transferring practices and knowledge inherent to them from one context to another and in order to be of effective use in its new context, "managers (and management scholars) need to deeply understand 'knowledge contexts'" (Brannen/Doz 2010, p. 242). However, in order to fully understand the phenomenon of practice transfer, it is necessarily to include more levels of analysis.

## 2.1.2 Organizational level factors

On an organizational level, the number and thematic scope of empirical studies and theories concerned with factors that impact the transfer of practices is overwhelming. Some studies take the absorptive capacity of the recipient unit into consideration (Ahlvik/Björkman 2015; Björk-

man/Lervik 2007; Szulanski 1996), i.e. the recipient's "ability to value, assimilate and apply new knowledge successfully" (Szulanski 1996, p. 31). The recipient's absorptive capacity is influenced by the HQ's transfer capacity which is demonstrated by the HQ's effort in promoting the practice transfer by communicating the value of the practice, dedicating resources to support the transfer and, critically, its openness to adapt the practice to the subsidiary's needs (Schleimer et al. 2014). This goes in line with another important factor on organizational level which is the HQ's strategic orientation towards its foreign subsidiaries (Bartlett/Ghoshal 1989; Perlmutter 1969): Barmeyer (2012) for example states that an ethnocentric attitude is detrimental in international practice transfer and concludes that only an ethnorelativistic approach is helpful when recontextualizing practices. Related to their strategic orientation is the global integration versus local adaptation dilemma MNCs are faced with (Pudelko/Harzing 2007) and to which Ansari et al. (2014), for instance, have provided an answer to: In their study of the diffusion of a quality management practice within the aerospace industry, they identify three strategies of how the organization managed to keep the balance between making it locally responsive and maintaining its homogeneity: First, the company installed achievement levels in order to reduce the practice' complexity making it easy to slowly get familiar with it, account for different levels of subsidiary capabilities and also motivate to adopt the practice. Second, the HQ differentiated between the must-have aspects of the practice that were non-adaptable and the aspects where local negotiation was possible. And third, the company took systemic and context-specific misfits seriously which caused low acceptance of the practice or made it difficult to implement it in its entirety and either fostered a local solution in case of a context-specific misfit or was eager to learn from systemic misfits in order to continuously improve the practice itself.

Fortwengel (2017) engages in investigating the way how the practice transfer is governed and what impact the specific governance mode has on another trade-off relevant to the field of practice transfer: the balance of internal and external fit. The notion of internal and external fit will be discussed in detail in chapter 2.3. A company can either organize the transfer via leveraging its interorganizational network, in the

sense of finding other organizations to partner with or leveraging its hierarchy, i.e. transferring the practice on its own. The selection of the mode of governance has in turn different implications for the practice' internal and external fit.

For Kostova (1999), the compatibility of the recipient unit's organizational culture with the practice' values is one important organizational factor and the recipient's cultural openness towards innovations, change and learning another. Szulanski (1996) would call that a *fertile* organizational context.

Apart from that, Björkman and Lervik (2007) and Ahlvik and Björkman (2015) detect several organizational level factors which influence the transfer of practices: Governance mechanisms, intra-organizational social capital, the subsidiary's present – in this case HR – system and the management of the transfer process by the HQ. A rather dependent subsidiary, for instance, can be forced to implement certain practices. However, forcing them, as one can imagine, is counterproductive as the practice is merely implemented at the surface. Also, tying performance criteria to the implementation of a practice may indeed foster its implementation, but again risks to stay at a ceremonial adoption level. Interaction ties are informal normative integration mechanisms which complement formal control and coordination mechanisms by fostering the establishment of personal relationship between HQ and subsidiary members and making them have positive attitudes towards each other. These ties either evoke mimetic practice adoptions or can be used by the HQ to put pressure on practice implementation (Björkman/Lervik 2007). Also, Szulanski (1996) highlights the importance of the ease of communication and a certain kind of 'intimacy' within the relationship between sender and recipient as opposed to an 'arduous' relationship for ensuring successful interactions during the transfer. Shared cognition can also positively influence the transfer of practices (Björkman/Lervik 2007). It is defined as "the extent to which subsidiary and MNC HQs management share language, vocabularies and narratives" (p. 327) and belongs to the cognitive dimension of social capital. The theory of social capital proposes that "networks of relationships constitute a valuable resource for the conduct of social affairs" (Nahapiet/Ghoshal 1998, p. 243). A shared company speak, for instance, can facilitate infor-

mation and knowledge sharing and success stories about the practice' implementation in other subsidiaries might lead to more subsidiaries implementing the practice. Last but not least, trust is an important part of the HQ-subsidiary relationship (Björkman/Lervik 2007) and is also shown by Kostova and Roth (2002) to be an important mediator of successful practice transfer. What also possibly influences the openness for a new practice from the part of the recipient unit is whether it is satisfied or not with its existing, say, HR system. In case a practice is intended to replace a beloved and locally developed practice, a not-invented-here feeling and resistance may be the consequence. In addition, a subsidiary that already has capabilities and competencies in the field where the practice is home to, is likely to make full use of the new practice and also integrate it within the organization. Apart from that, the authors highlight the importance of a due process, i.e., for instance the involvement of subsidiaries in decision-making and design of the practice, and the capabilities of the HQ regarding change management (Björkman/Lervik 2007).

The notions of power and interest within practice transfer is another important stream of research (Ferner et al. 2011) as well as the combination of rules and resources subsidiary managers can use in order to shape the outcomes of the transfer (Tempel/Walgenbach 2012). Both HQ and subsidiaries can, for instance, have power of resources, meaning and processes and by making use of it influence the outcomes of a practice transfer (Ferner et al. 2011). Language and translation performed by subsidiaries might influence the power structure between them and the HQ (Logemann/Piekkari 2015). In this regard, the organizational level is hardly to differentiate from the individual level as the agency and interests of individuals is central for exerting power. Similarly, the notion of trust can be tied to individuals or to the organization as a whole. Let's take a look, therefore, on the individual level factors and their influence on the transfer of practices.



### 2.1.3 Individual level factors

The notion of power within international practice transfer is also relevant for the individual level of analysis. Logeman and Piekari (2015), for instance, show, how a subsidiary manager influences the outcome of the transfer of a new strategy by translating its core terms into the local language and adding notes to some of them which he thought would need further explanation. This led to a considerable degree of localization of the strategy which was not intended by the HQ. Tempel and Walgenbach (2012) take a look at how subsidiary managers engage in institutional work in order to influence and potentially resist practice transfer. For instance, in a subsidiary located in a country with constraining rules and which is powerful in terms of the resources it can draw on, a manager is able to successfully resist new practices and defend local ones as is also shown by Edwards et al. (2007).

One of the most important notions when it comes to individual level factors is the transfer coalition, i.e. the group of people which is in charge of the transfer and plays an essential role in bridging source and recipient in terms of “selling” the practice to the recipient unit. Kostova (1999), Klimkeit and Reihlen (2016) as well as Edwards and Molz (2014) and Söderberg (2015) have engaged in researching the role of the transfer coalition. To begin with, Kostova (1999) argues that, as a transfer mostly implies major changes at the recipient unit, there have to be actors at the recipient who dedicate time and effort in order to support this change. She refers to this group of actors as the transfer coalition, composed of core members, i.e. people who are in charge of all the transfers that are to be managed, and expert members who contribute with their practice-specific competencies. The transfer coalition can be considered as the bridge between the HQ and recipient unit in that it is essential in making sense of the practice and communicate that sense and value to fellow subsidiary members. In this regard, there are strong parallels to the concept of boundary spanning where individuals act as facilitators of cross-boundary coordination, often being bi- or multi-cultural or at least demonstrating high levels of intercultural competence (Schotter et al. 2017) and language skills. These individuals support the exchange of information across compa-

ny-internal boundaries, link actors who previously were disconnected via their personal network, intervene in case of misunderstandings, conflicts or in order to support trust-building and – probably most important for the context of international practice transfer – facilitate cross-boundary interaction (Barner-Rasmussen et al. 2014) by “helping members of two groups understand each other through interpretation” (Barner-Rasmussen et al. 2014, p. 888) which is achieved by explaining the frequently tacit components of behavior or narratives and by “framing arguments in ways that can be understood and accepted by the other group” (Barner-Rasmussen et al. 2014, p. 888). Conceptualizing the transfer of practices as a process of institutional change, Edwards and Molz (2014) also highlight the importance of – how they call them – change agents when it comes to adapting the practice to its new context or reconstructing the practice to resolve potentially emerging contradictions. In the first case, change agents would be required at recipient unit level, while in the second case both subsidiary and HQ actors are engaged in the reconstruction of the practice. As a change agent of practice transfer, one must have a global mindset, i.e. “an openness to and articulation of multiple cultural and strategic realities on both global and local levels, and the cognitive ability to mediate and integrate across this multiplicity” (Levy et al. 2007, p. 244). Also, a high degree of identification with the parent and subsidiary organization may increase change agent effectiveness. This *dual* organization identification needs to be present in the transfer coalition as a whole, i.e. does not necessarily need to be displayed by every single subsidiary and HQ actor (Edwards/Molz 2014). For Kostova (1999), this identification is part of a broader set of relationships which influence the motivation of the transfer coalition to engage in the transfer. She differentiates between attitudinal (commitment to parent company, identity with parent company, trust) and power/dependence relationships which are both impacting the outcome of the transfer differently. Important to note here is that Kostova’s (1999) concept of transfer coalition is only made up of recipient unit actors, while in the case of Edwards and Molz (2014) both HQ and subsidiary actors form part of the coalition.

Klimkeit and Reihlen (2016) consider the transfer coalition as a “mediator between the efforts made by HQ to transfer an organiza-

tional practice and the degree of implementation and internalization by the recipient local subsidiary” (p. 852). Looking at how leadership and control is exerted by the actors involved, the authors empirically detect two types of transfer coalitions: Entrepreneurial and ceremonial transfer coalition. The first type sees the new practice as an opportunity and answer to critical subsidiary challenges. It therefore dedicates a lot of effort in exploiting the opportunities resulting from the practice as well as mobilizing fellow subsidiary actors to support this process. This attitude is complemented by an entrepreneurial leadership style which is able to deal with uncertainty and envisions how the practice may translate into future benefits. Control therefore is exercised interactively, i.e. not relying on fixed performance indicators as would be the case in non-uncertain circumstances, but on a control system involving client control (giving customers an active voice, listening to their feedback and preferences regarding the transferred practice) or ideological control (dominant beliefs and values that are imposed on others) among others (Klimkeit/Reihlen 2016). The second ceremonial type of transfer coalition engages in practice transfer not for the sake of solving current problems but “more to help convey positive images and impressions of HQ and/or subsidiary activities” (p. 868). For this type of transfer coalition the transfer is understood as an administrative task. It is about putting these predefined systems, programs and routines into action. As it is considered as an administrative task, there isn’t perceived high uncertainty or ambiguity which again results into the leadership approach being not much involved in nature. Control systems create a “performance façade” that can be fed back to the HQ and might even involve “cooking the books” in order to provide a successful picture of the implemented practice. The authors interestingly conclude, that the ceremonial type of transfer coalition strengthens the HQ position insofar as it creates the impression that HQ has good initiatives to offer and is able to transfer practices successfully. Simultaneously, such a behavior strengthens subsidiary autonomy as practices are implemented of which they are more convinced while subsidiary actors keep up the constructed façade of compliance and performance (Klimkeit/Reihlen 2016).

Although not calling it transfer coalition, Bhagat et al. (2002), investigate the moderating effect of the cognitive style of the individuals who are responsible of transferring knowledge across borders. Tolerance for ambiguity is one trait they find to be useful for both sending and receiving knowledge that is complex, tacit and systemic. Possessing signature skills is another factor in this regard, i.e. skills that are specific for the actor's professional identity within the organization. The holistic versus analytical mode of thinking is a third factor which – especially when distinct in both parties involved – facilitates or complicates the transfer.

As this review of existing literature has shown, the variety of contextual factors impacting the international transfer of organizational practices is big and the interconnectedness of the three different levels of analysis (Barmeyer 2018) further increases the complexity of conducting research in this regard. At the same time, practice transfer in reality will be complex and multifaceted and no simple undertaking. Thus, taking a great variety of theories, concepts and perspectives into account seems to be mandatory when gaining a holistic and deep understanding of this phenomenon is the overriding goal. This is also why this thesis does not only stay at the context level, but also wants to integrate the process of institutionalization which shall be described in the following.

## 2.2 The process of institutionalization

Besides the contextual factors that influence the transfer of organizational practices, theory so far also drew attention to dimensions of transfer success. Kostova (1999) defines transfer success as degree of institutionalization of the practice, i.e. “the process by which a practice achieves a taken-for-granted status at the recipient unit, a status of ‘this is how we do things here’” (p. 311). Institutionalization can be achieved by reaching both the *implementation* and *internalization* of the practice (Kostova 1999). Thus, “[o]nly when the practice is implemented formally and is also internalized by the employees will it become an institutionalized organizational practice with strategic importance” and “a source of organizational identity and competitive advantage” (p. 312).

Björkman and Lervik (2007) and Ahlvik and Björkman (2015) add *integration* as a third dimension of transfer outcome.

*Implementation* refers to following the rules of the practice which is reflected in specific behaviors and actions of employees of the respective organization (Kostova 1999). Implementation thus is objectively observable and allows assessing the similarity of the enacted practice with the one originally developed by the HQ (Björkman/Lervik 2007; Ahlvik/Björkman 2015).

The implementation of the practice is closely related to its *internalization*, meaning that internalization gets less likely if implementation hasn't taken place beforehand (Björkman/Lervik 2007; Kostova 1999). This causality has been empirically tested by Kostova and Roth (2002). Internalization can be defined as the "state in which the employees at the recipient unit attach symbolic meaning to the practice" (Kostova 1999, p. 311). This state is reached once the practice has gained acceptance by the employees, the value of enacting the practice is seen and it becomes part of the employees' identity. In other words, internalization can be conceptualized – adapted from the field of organizational behavior – by the constructs practice commitment, practice satisfaction and psychological ownership (Kostova 1999). Following Mowday et al.'s (1979) definition of organizational commitment, practice commitment can be described as "the relative strength of an individual's identification with and involvement in a particular [organizational practice]" (p. 226). In other words, employees will be committed to the practice once they believe and accept its goals and values, are willing to invest effort to implement it and want it to continue to be in use (Mowday et al. 1979). Commitment is very closely related to satisfaction. Practice satisfaction, in that case, is the positive affective attitude an employee demonstrates towards the practice (Kostova 1999), which results from the fit of values that are important for the individual and the perceived values that are transferred by the practice (Silverthorne 2005). Finally, psychological ownership as the third construct within internalization is the "state in which individuals feel as though the target of ownership [...] or a piece of it is 'theirs' (i.e. 'It is MINE!')" (Pierce et al. 2001, p. 299). Past research has shown that owning something is an important part of the human existence. Researchers continuously argue about whether

the need to possess reflects an innate instinct or is learned in the child's early development process. Psychological ownership can be reached through *controlling the target* of ownership (Pierce et al. 2001), e.g. by being involved in decision-making processes (Dawkins et al. 2017) or by having a job with high autonomy (vs. a centralized and formalized one) which then can be regarded as part of one's self. Another factor to increase psychological ownership is *intimate knowledge of the target* of ownership, meaning that both information about the target as well as a high intensity of interaction with the target results into knowing the target better and thus to a higher degree of ownership towards it. And ultimately, *investing the self into the target* is a very powerful way to create psychological ownership: Investments can be ideas, skills, time and energy and the higher these investments are the more ownership the individual will feel towards the job or task. Of course, non-routine and complex task provide most opportunities of investing the self (Pierce et al. 2001). Key actors of the recipient are central when internalization for the organization as a whole is to be reached. Only if they, e.g. subsidiary managers, believe in the transferred practice, it is possibly having good results. It is vital, therefore, to achieve managers' intrinsic motivation regarding practice transfer (Ahlvik/Björkman 2015).

Empirical investigations on implementation and internalization of practices are still limited: There are some studies concerned with the extent to which the practices at the recipient unit resemble those of the HQ and how different factors influence the similarity or dissimilarity (Gamble 2003; Gamble 2010; Kostova/Roth 2002). Kostova and Roth (2002) additionally examine how institutional and relational factors influence the degree of implementation and internalization and identify four patterns of adoption: *active adoption*, the deepest level of adoption, showing high levels of both implementation and internalization due to favorable institutional duality; *minimal adoption*, where both implementation and internalization of the practice are low; *assent adoption*, where individuals acknowledge the value of the practice but show low levels of implementation; and finally *ceremonial adoption*, where the practice is implemented but not internalized.

Apart from that, knowledge about the dimensions of transfer is still limited, as it is also stated by Chang et al. (2017) in their recent literature

review on practice transfer and diffusion. They call for studies applying the model of implementation, internalization and integration like Björkman, Ahlvik and Lervik (2007; 2015) have proposed.

This leads to the last dimension of practice transfer which was added by Björkman and colleagues: *Integration*. Integration refers to the “degree a transferred practice is connected and linked up with existing routines and practices in the recipient location” (Björkman/Lervik 2007, p. 322). It thus aims at increasing the fit of the practice with the “(perceived) needs, objectives, and structures of an adopting organization” (Ansari et al. 2010, p. 68). It is assumed that a practice that is not only adopted at a ceremonial level to please the HQ, will always have implications on other practices already existing within the organization (Björkman/Lervik 2007). To reach the integration of the practice is a difficult and complex task as there have to be actors who actively search for and establish linkages to existing practices (Ahlvik/Björkman 2015).

So far, not much attention has been paid to the latter dimension. That the nature of all three dimensions of transfer is existing in practice has been tested by Ahlvik and Björkman (2015) in a Scandinavian context. They additionally tested to what extent formal control mechanisms exerted by HQs, social capital ties between sending and receiving unit and the subsidiary’s capabilities concerning the transferred practice influenced the dimensions of transfer. Apart from that, to the best of my knowledge, no other study had dealt with these dimensions of transfer success so far.

Szulanski (1996) also conceptualizes a transfer process involving four stages which focusses on the actual sequence of happenings from the decision to transfer until the final institutionalization of the transferred practice. The first stage is called *initiation* and involves all events that lead to the decision to transfer such as the identification of a certain need and search for its solution. The second stage of *implementation* starts when the decision is taken to proceed transferring the practice. Resources flow, interaction ties are set up, the practice gets adapted. The recipient unit enters the third *ramp-up* stage, once it actually uses the new practice. Problems might occur which are getting resolved and the recipient’s performance is improving. Once the results of using the practice are satisfactory, the last stage of *integration* begins. The

practice gets institutionalized as knowledge gets routinized and shared meanings and behaviors emerge. This process indeed gives an overall overview over how a transfer project evolves but it nevertheless stays a very superficial level of understanding. The way how a process is understood in this thesis follows the described process of institutionalization conceptualized by Kostova (1999) and further worked on by Björkman and Lervik (2007) and Ahlvik and Björkman (2015). One last note shall be made regarding the procedural character of institutionalization: Kostova (1999), for instance, views implementation as a pre-condition for internalization arguing that the more the practice is dealt with, i.e. its formal rules are followed in practice, the more employees will attach meaning to it and take it for granted in a certain point in time. Kostova and Roth (2002) show in their study on how institutional and relational factors impact the adoption of practices first, that it is more likely to internalize a practice after implementation was reached but second, that a recipient might have internalized the practice but has not implemented it due to missing capabilities, for instance. Thus, implementation can but might not necessarily be a pre-condition for internalization. The word process does not appear in Björkman and Lervik's (2007) study. For them implementation, internalization and integration are "dimensions or criteria for assessing whether transfer is accomplished" (p. 312). But they agree on the casualty between implementation and internalization and also state that integration is more likely when implementation has happened. Also later, Ahlvik and Björkman (2015) continue to draw on implementation being a pre-condition for both implementation and integration. In this thesis, I will stick to viewing institutionalization as being a process consisting of the three dimensions – without adopting the rather positivist cause-effect thinking but with keeping in mind that the exact order is not strictly defined.

Here again, similar to what was said before in the conclusion of the previous chapter, a mere focus on the practice institutionalization wouldn't explain the phenomenon of practice transfer in its entirety. The actors who influence this process by for example attaching new meaning to elements of the practice or adapting it aren't included as a level of analysis if solely looking at the process alone. Similarly, contextual factors on a meso and macro level for sure are impacting the



way this process develops and might determine whether internalization or integration are reached. Thus, once again, a “conceptual bricolage” (Gamble 2010, p. 705) in order to really grasp the dynamics of international practice transfer is necessary.

## 2.3 Outcomes and recontextualization

A third and last perspective that shall be taken into account for this thesis is on the outcomes of a practice transfer.

Several researchers described different patterns of practice implementation or adoption. Edwards and Molz (2014) for instance differentiate between the four patterns adoption, non-adoption, adaptation or reconstruction which are resulting from the difference or alignment of HQ and subsidiary interests. These interests are in turn impacted by their relative institutional environments and the interest of both parties in the practice domain itself. In the case of *adoption*, there are no contradictions and interests are aligned. *Non-adoption* occurs when interests are misaligned, the receiving unit does not feel that the practice leads to better performance and the HQ doesn't consider the practice as strategically relevant for the subsidiary either. Adaptation might be the outcome, when the HQ doesn't demand direct adoption but allows to modify the practice in order to overcome contradictions. This requires knowledgeable and motivated change agents like they were described in chapter 2.1.3. The subsidiary considers the practice to be helpful but in a different shape than proposed by the HQ while the HQ is less concerned about the way it is adopted as about the outcome it generates. The fourth pattern of *reconstruction* is particularly interesting: In that case, both parties are interested in making the practice work while they are located in distant institutional environments. Thus, contradictions arise which are to be solved by change agents from both HQ and subsidiary who jointly reconstruct the practice using elements from both institutional dyads. That the HQ does not simply encourage the subsidiary to adapt the practice is due to the fact that the practice is highly interconnected within the company as a whole so that a certain degree of standardization is necessary. The reconstructed, new practice is then

adopted by both HQ and subsidiary. This last pattern is akin to Adler's (1980) concept of cultural synergy (see chapter 3.1) and to the hybridization of practices: Patel et al. (2018) show in their study of practice transfer from an Indian IT multinational to its Australian subsidiary that home-country HR practices were merged or combined with local practices in order to be locally responsive while setting a certain standard. The payroll for Australian staff, for instance, is managed centrally but according to local wage awards. Hybridization can be defined as "the pursuit of transferring the 'essence' of a business model or practice, but in a reinterpreted and reinvented form that better fits the different and cultural context" (Kühlmann 2012, p. 95f) and can be considered as a third or middle way of managing foreign operations between replication of home practices and complete adoption of local practices (Kühlmann 2012).

Lervik and Lunnan (2004) empirically retrace four similar patterns of adoption when investigating the global implementation of a performance management system within a Norwegian multinational company. They call the first one *conformity*: Some of the units adopted the practice in the way it was planned by the HQ but it stayed superficial and decoupled without having much impact on other practices and activities. It seemed that these units first of all wanted to gain legitimacy with the HQ. Others call this pattern *ceremonial adoption* or *decoupling* when practices are merely adopted for legitimacy reasons (Meyer/Rowan 1991; Kostova/Roth 2002). Collings and Dick (2001), for instance, investigate the impact of the motivation to transfer on transfer outcomes and find out that ceremonial adoption is likely – even in case there is no great institutional distance – when the transfer itself was motivated on the part of both HQ and recipient unit by legitimacy reasons. Second, the pattern of *transfer* was found in one unit which also was involved in the design and pilot of the practice: This unit implemented the practice and integrated it with existing practices. In other units, the pattern of *translation* was identified: Here, the procedural aspects of the practices were adopted but symbolic modifications were made. The last pattern of *local modification* refers to innovations and hybridizations that occurred in some units. They extended the original practices and applied it in a different way (Lervik/Lunnan 2004).

Following on their quantitative study on how the institutional and relational context influences the implementation and internationalization of practices, Kostova and Roth (2002) define three more adoption patterns in addition to the previously discussed pattern of *ceremonial adoption*: *Active adoption*, which is characterized by high levels of implementation and internationalization due to a favorable institutional framework as well as trust in the HQ; *minimal adoption*, where implementation and internalization are low as dependence on and trust in the parent organization is low as well and the institutional environment is not that favorable; *assent adoption* occurs, when internalization is high as the subsidiary is highly dependent on the parent, but the level of implementation is low, e.g. due to limited capabilities of the recipient.

All these conceptual and empirical arguments around adoption patterns within practice transfer show how diverse and dynamic the phenomenon under study is: With two or more organizational actors and individuals involved who have certain interests, motivations, skills and capabilities, being confronted with different institutional realities and relationship patterns within a change process, the study of practice transfer becomes complex and dynamic.

Complexity increases even more as practices are likely to change their nature during the transfer and “often cannot be adopted by user organizations as ‘off-the-shelf’ solutions” (Ansari et al. 2010, p. 67). This has been shown in parts above in patterns like *translation* or *reconstruction*. Rather, Ansari et al. (2010) argue that adaptations are made based on the fit between the practice and the recipient organization. They define fit as “the degree to which the characteristics of a practice are consistent with the (perceived) needs, objectives, and structure of an adopting organization” (p. 68) while adaptation describes the process of creating a better fit which can be technical, cultural or political in nature. Cultural fit is of particular interest here: The transferred practice is characterized by certain meaning structures and values which come upon a receiving organization that also holds certain values and belief systems as of course do the individuals involved in the transfer. Apart from that, industry- and society-level cultural characteristic come into play (Ansari et al. 2010). Fortwengel (2017) makes a similar differentiation of internal and external fit: Internal fit is “the alignment with

an organization's objective, needs, culture and norms" (p. 692) and is reached by implementing and internalizing the practice, but potentially also by adapting organizational factors. External fit refers to the practice gaining legitimacy and support in the environment of an organization by, for instance, engaging in institutional work (Fortwengel 2017).

The fit between the transferred practice and the local context of the recipient unit is also central for the concept of *recontextualization*. Brannen (2004) defines recontextualization as the "process by which the consumer or transferee makes sense of the product, practice, service transferred from abroad into his or her own culture" (p. 605). Barmeyer (2012) defines recontextualization as a mutual, dialogical negotiation process between actors from both home and host context which ultimately results into a fit of central elements of the practice and the host context, so that the practice is perceived to be valuable, useful and effective for the whole organization. For Brannen (2004), recontextualization centers on the new meanings aspects of the practice might take on in its new context and thus engages in studying language and how it produces meanings, i.e. semiotics. People-dependent practices are frequently more embedded in their original context than 'harder' technologies and thus may highly lack semantic fit. Thus, for a successful transfer, the practice needs to achieve semantic fit within its new context, in addition to the more traditional strategic fit which relates to institutional distance, for instance. The author describes a process of how meaning gets attached and evolves over time, a process called semiosis. It is visualized in figure 1. During the initial semiosis, pre-existing meanings in the new context are attached to aspects of the practice. The example, Brannen (2004) gives for this initial semiosis is the Western understanding of *sushi* as raw fish instead of the Japanese, original meaning of *sushi* as pickled rice. In the second phase of ongoing semiosis, aspects of the practice evolve and continue to further be recontextualized. In the *sushi* example, the California roll as an American invention with cooked crabs instead of raw fish is an example for ongoing semiosis. A last phase is reflexive semiosis in case the new meanings that emerged in the practice' new context are repatriated into its home context. The California roll, for example, is served in Japan now as well. Recontextualization can be positive or negative in that it

either contributes to learning and innovation or threatens the transfer and thus the company's strategic intent.

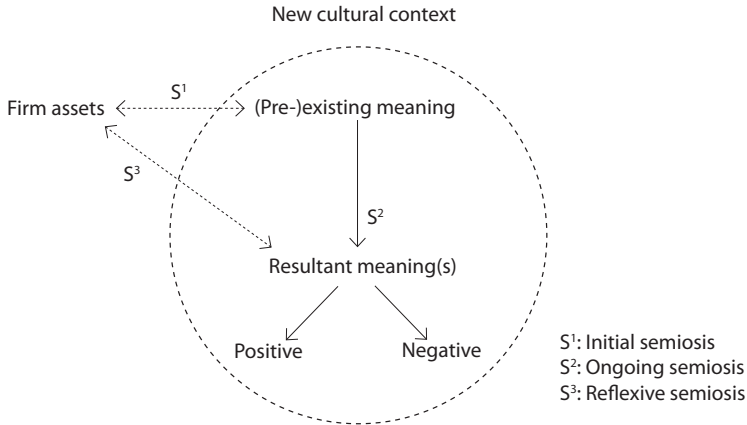


Figure 1 Recontextualization of firm assets (Brannen 2004, p. 604)

In order to prepare for or actively keep recontextualization in mind during the international practice transfer, Barmeyer (2018) proposes three strategies relevant at different phases of the transfer: Negotiated conceptualization, i.e. involving subsidiaries into the conceptualization of practices from the beginning in order to directly integrate their perceptions and meanings; negotiated communication, i.e. the joint preparation and support of the practice's implementation including the explanation of the practice, potentially supported by boundary spanners; and negotiated adoption, i.e. providing space for recontextualizing the practice in order to enable subsidiary employees to attach meaning to it.

Other terms neighboring the concept of recontextualization are the *translation* or *editing* of ideas or practices. These terms are rooting in the Scandinavian institutionalism and aren't to be seen as a linguistic term but are highlighting the transformation and movement of ideas and practices as they travel into new local contexts (Sahlin/Wedelin 2008). Particularly interesting regarding the concept of *translation* is the notion of dis-embedding, i.e. 'disconnecting' the practice from its original context, and re-embedding, i.e. recontextualizing it within their new context (Czarniawska/Joerges 1996).

There are numerous studies which build on the concept of recontextualization. D'Iribarne et al. (2020), for instance, provide a collection of studies that show how the reception of the – at first sight universally accepted and applicable – American practice of management by objectives undergoes recontextualization very differently in different cultural contexts. Gertsen and Zølner (2012) investigate the transfer of corporate values from a Danish HQ to its subsidiary in Bangalore, showing how concepts like empowerment and work-life balance undergo a semiosis in light of their new, Indian context. The authors also show that not all employees recontextualize the values in the same way, but rather, individual dispositions and capitals influence the extent to which new meanings are attached to corporate values. Similarly, Peltokorpi and Vaara (2012) highlight the importance of key subsidiary actors, like e.g. subsidiary presidents, in their study on the recontextualization of language policies and practices of subsidiaries in Japan. Söderberg (2014) as well shows how key actors – this time from both the HQ and subsidiaries – are central within the process of recontextualization. She investigates the implementation of an initiative to foster global integration of organizational culture within Carlsberg, focusing on subsidiaries in China and Malaysia. This study is a particularly successful and inspiring example of practice transfer, as it shows how collaboratively designing the initiative as well as continuous HQ-subsidiary collaboration during implementation made subsidiary managers engage in sense-giving activities towards their local employees. This might not have been the case when the initiative would have been designed and implemented top-down or if the HQ management would have insisted in a global approach. One could therefore reason that the fact that the initiative as being co-created and negotiated between the HQ and its subsidiaries while simultaneously following a *glocal* approach in its implementation helped subsidiary actors making sense of it and recontextualizing it positively. The approach demonstrated by Carlsberg is thus involving all three levels of constructively dealing with practice transfer that are proposed by Barmeyer (2018): Negotiated design, i.e. involving subsidiary actors in designing the practice; negotiated transmission, i.e. preparing recontextualization through communicating cultural and institutional particularities via actors like boundary span-

ners; and negotiated reception, i.e. giving leeway for recontextualizing practices. By considering both the HQ and subsidiary actors the study is also an answer to Ansari et al.'s (2010) critic that studies on the diffusion of practices most frequently focus on the adopting unit and that attention should be drawn on both the sender and recipient unit in order to potentially assess how “practices are made to vary” (Ansari et al. 2014).

## 2.4 Summary

The previous chapters have shown the multifaceted and complex nature of the field of international practice transfer. Numerous concepts have been developed in the past to study this phenomenon representing a multitude of perspectives for its analysis. Following on the various calls made to integrate different perspectives in order to better account for the complexity of the phenomenon of international practice transfer, this thesis aims to take the above mentioned and described concepts, models and theories into account for two reasons: First, the contextual factors on a macro, meso and micro level, the process of institutionalization and the outcomes of practice transfer or, more specifically, the recontextualization of the practice under study are – in parts – still underresearched and are – taken together – able to provide a holistic picture of the transfer under study. Second, the inductive approach taken on in this study and a first data analysis before the specification of the theoretical frame has yielded that a focus on these three major components is a good way to make sense of the complex data without reducing or simplifying it (Zaidman/Brock 2009).

A helpful conceptual framework which will also guide the empirical analysis of the transfer is provided by Pettigew (1987) who advocates for an approach to studying organizational change from three different, yet interrelated perspectives. Using a framework which was originally conceptualized for studying organizational change in this transfer's case seems reasonable: Various authors state that transferring a practice is inevitably connected to a transformation at the recipient unit: Kostova (1999) argues that the “transfer of practices typically is associated with organizational learning, change and innovation at the recipient unit” (p.

317). Edwards and Molz (2014) specifically build their research on and extensively justify the argument that “practice transfer within the MNE can be considered a process of institutional change” (p. 117). Also, Sahlin and Wedlin (2008) state that “[d]iffused ideas could add to or result in changes to organizational identities and to what appeared as normal, desirable and possible” (p. 221), while others name the HQ’s change management as an important factor in successfully transferring practices (Björkman/Lervik 2007). Apart from that, Barmeyer and Davoine (2011) use Pettigrew’s framework to structure their data analysis within their study on the implementation of a US code of conduct in foreign subsidiaries. Building on that, an adapted version of Pettigrew’s framework shall be used for making sense of the present practice transfer case. Pettigrew (1987) criticizes that most research on organizational change focuses on the change itself as unit of analysis – without taking its context and process into account. He therefore proposes to study change involving the categories content, context and process while also paying attention to their interrelationships. *Context* can be conceptualized as outer (social, economic, political and competitive environment of the organization) and inner context (structure, organizational culture and political context within the organization). *Content* refers to the specific areas of change that shall be examined, e.g. a change in technology or culture. *Process* are all actions, reactions and interactions of all stakeholders involved in the transformation. Figure 2 shows a visualization of Pettigrew’s approach.

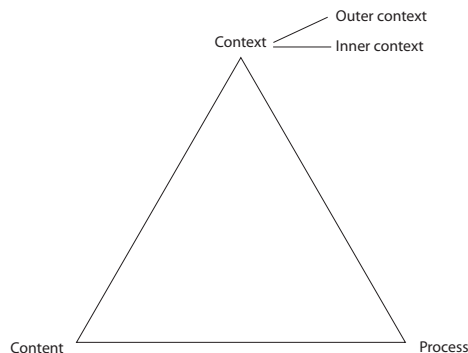


Figure 2 Framework to study organizational change (Pettigrew 1987, p. 657)



In order to better account for the research question of research phase 1, Pettigrew's framework is slightly adapted which is shown in figure 3: First, it is assumed that the nature of all categories can change and is influenced by actors who are involved in the transfer process, i.e. the action, reactions and interactions of actors which Pettigrew (1987) subsumed under the dimension *process*, are in my adaptation omnipresent. *Process* in the present case is understood as the process of institutionalization of the practice at the recipient unit which is the intended outcome of the transfer (Kostova 1999). And second, the category *content* involves adaptations or recontextualization of the specific practice. That is, based on Pettigrew's framework, the first research phase tries to find out more about the interrelationships between contextual factors (*inner and outer context*), the implementation, internalization and integration of the practice at the recipient unit (*process*) and its recontextualization (*content*).

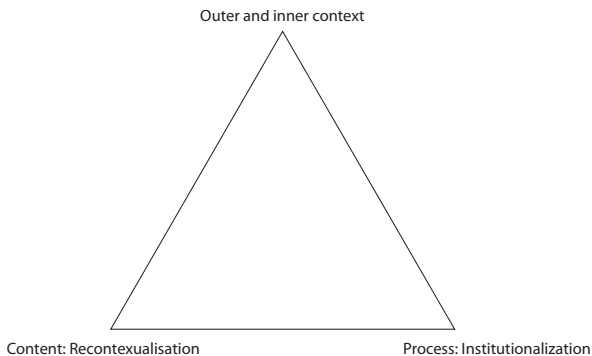


Figure 3 Conceptual framework of studying international practice transfer (adapted from Pettigrew 1987, p. 657)

Before taking a look at the existing literature and theories on intercultural OD as being the second main topic, a digression shall be made in order to introduce an important leitmotif which is highly relevant for both research phases: A constructive and dynamic view on the notion of culture.

### 3 Digression: Constructive Interculturality and multiple cultures

“The beauty of being in a multinational environment is it eliminates your blind spots. When you are alone, there are parts of things you cannot see. But, if I am with you, you are going to see and tell me things I don’t know and I cannot see. So by working in a bigger group, you get wider horizons.” (Stahl/Brannen 2013, p. 497)

That cultural differences and diversity in international business are beneficial gains more and more acceptance in international and cross-cultural business research. “Culture is not a source of difference and antagonism but rather a form of knowledge that can be turned into a resource” (Blanche/Depuis 2019, p. 31). Söderberg and Holden (2002), for instance, call for an alternative and newer approach to cross-cultural management. They criticize traditional cross-cultural management literature which treats culture as a barrier for doing successful business and as a source for conflict, i.e. a problem that needs to be solved in order to be successful as a corporation. The literature on international practice transfer, for example, holds a rather negative view on culture as it is posing an obstacle to effective transfer (Myloni et al. 2007). In general, the negative understanding of culture is reflected in constructs like institutional gap, cross-cultural miscommunication (Stahl/Tung 2015), cultural distance, misfit or foreignness which still are widely used in the literature (Stahl et al. 2017). Also, in their content analysis of literature on culture in international business over the course of more than 20 years, Stahl and Tung (2015) conclude that a negative view on culture still prevails, although slowly more and more examples show that cultural differences can have positive effects. Some authors already supported this shift in mindset and presented empirical studies on how culturally diverse environments had positive effects (Bartel-Radic 2006; Brannen 2004; DiStefano/Maznevski 2000) and produced synergistic outcomes (Adler 2008; Barmeyer/Davoine 2019). For example, Adler (2008) reports from her research on cultural diver-

sity in Montreal advantages resulting from diversity especially in the advent of new, future-oriented undertakings, like a reorientation of the organization or a launch of new strategies, products or projects. In management practice, the search for a resource-oriented approach is especially well reflected in the emergence of diversity management programs (Barmeyer/Franklin 2016). Further, Barmeyer (2018) even dedicates a whole textbook to the constructive understanding of interculturality and cultural differences.

Some concepts and models which apply a constructive perspective on culture, thus consider it as a resource and theorize about that, shall be now described in the following.

### **Cultural synergy**

One of the first researchers who established a view of culture and cultural diversity being a resource rather than an obstacle within international business was Nancy Adler in her contribution on cultural synergy (1980). She describes three intercultural management models: An ethnocentric or – as she calls it – *cultural dominance model* where the HQ imposes its own cultural mindset on both employees and customers from other cultures. Efficiency, consistency and simplicity are the resulting benefits of this “same-for-everyone” strategy while at the same time resistance increases, cultural diversity is simply ignored and synergies are missed to be used. Within the *cultural compromise model* cultural differences in doing business are recognized. Coordination within the multinational organization is based on reaching a compromise between the different culturally infused management styles by focusing on the similarities between them. This is resulting into acceptance from all parties but at the same time, it is restricting management options to merely similarities. Alternative ways are simply missed out on. The third model, however, takes both similarities and differences into account and forms a new, synergistic model of management. The *cultural synergy model* recognizes individual cultural characteristics but also goes beyond them in order to create a wholly new, synergetic way of management which has a higher quality than each single or the sum of each culture’s contribution (Thomas 1993). Figure 4 shows the last model.

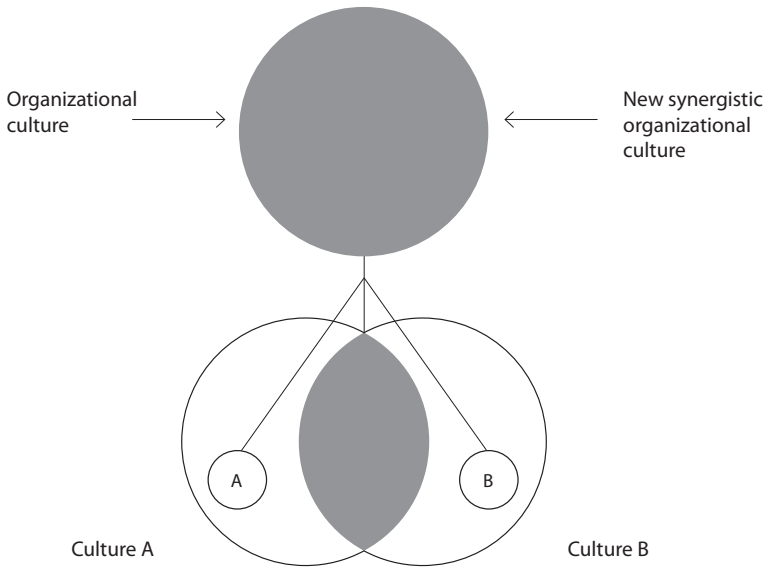


Figure 4 Cultural Synergy Model (Adler 1980, p. 173)

Although one may criticize that the fact of just two cultures being involved in Adler's conceptualization of cultural synergy may not take sufficient account of today's frequently multicultural interactions (Blanche/Depuis 2019), by introducing the third intercultural management model, Adler (1980) breaks with the tradition of seeing culture as an obstacle which every multinational company has to deal with sooner or later (Søderberg/Holden 2002). Within the synergy model cultural diversity is "viewed as a resource in the design and development of organizations" (Adler 1980, p. 172). The underlying assumption is that there isn't just *one single way* of seeing the world – an attitude which would be considered parochial –, nor is there *one best way* – which would be ethnocentric – but that there are rather *multiple ways* to see and make sense of our surroundings and interactions. That managers and leaders in organizations acknowledge and value that is indispensable to allow this diversity to unfold and producing synergistic outcomes (Adler 2008). Adler (2008) lists, based on her empirical research on cultural diversity, some synergistic advantages: Expanding mean-

ings, in the sense of greater openness to new ideas, multiple perspectives and interpretations and expanding alternatives by increased creativity, flexibility and problem-solving skills.

So far, research on synergy in intercultural settings remain largely unexplored (Barmeyer/Franklin 2016; Blanche/Depuis 2019). One of few examples is the work from DiStefano and Maznevski (2000) who investigate a number of multicultural teams and their performance. Based on the dynamics and interactions they observed in the highest performing teams, they develop a process model that can help multinational teams to reach cultural synergy: In the first step of this model, the *mapping* phase, the team members chose which characteristics to map, describe each member's characteristics and evaluate their impact on their team interaction. The second step, *bridging*, is meant for setting up an effective communication across the differences within the team. For that, a ground of motivation and confidence needs to be established, team members decenter, i.e. adapt their own behavior to the other team members' culture based on what they know from the mapping phase, before then actually spanning the bridge by defining a shared ground, i.e. the team's own new interaction and communication style. The last phase, *integrating*, then tries to convert the understanding that was reached in the first step and the effective communication into actual results. Here, it needs to be assured that team members actively participate in the discussions the team has in order to leverage ideas from each and every one. The potentially resulting disagreements need to be resolved, before the team then can build on the members' ideas, i.e. seeing them as a starting point, trying not to tap into the trap of compromise and generate wholly new ideas.

Another, empirical example is the study on the alliance of Renault and Nissan by Stahl and Brannen (2013), who's former CEO Carlos Ghosn famously expressed: "Synergy is not only what exists in one company or the other. It is not just about transferring best practices. It's also about creating together something that neither one could have done alone" (Stahl/Brannen 2013, p. 496).

### **Cultural complementarity**

A related, yet different approach to a constructive understanding of culture is called cultural complementarity. Cultural complementarity is

“a state in which particular and seemingly contradictory, but in themselves equally valuable, value-base characteristics (such as attitudes, norms, behavioral patterns, practices) of individuals from different groups complement each other to form a whole.” (Barmeyer/Franklin 2016, p. 200)

Thus, in an intercultural setting, the differences of the interacting persons are combined and lead to the employment of those characteristics which are the best fit in a given situation (Barmeyer/Franklin 2016). What helps achieving intercultural complementarity is, first, an ethnorelativistic attitude that recognizes and values the different characteristics involved which aren't thought off as either/or but as both/and, second, an understanding that sees these characteristics as resources and strengths and third, the employment of those characteristics that are best suited for a given situation (Barmeyer/Haupt 2016). Intercultural complementarity does not necessarily result into wholly new and unknown benefits. This aspect differentiates it from intercultural synergy (Barmeyer/Franklin 2016). One very tangible example is provided again by Carlos Ghosn in his interview with Stahl and Brannen (2013):

“We all know that the Japanese culture is very strong in engineering, very strong in manufacturing, very weak in communication, and very weak in finance. The Renault culture generally is very strong in some of the places where the Nissan culture is weak – for example, in finance, in telling the company narrative, and in artistic and emotionally evocative advertising and marketing. That's why I think the Renault-Nissan Alliance works so well – because the cultures are different, yet complementary.” (Stahl/Brannen 2013, p. 496)

### Negotiated culture

Based on longitudinal, ethnographic research into different, international joint venture (IJV) work settings, Brannen and Salk (2000) develop the concept of negotiated culture. This approach “views bicultural IJV as settings where the patterns of meaning and agency in the organization arise from the interactions and cultural negotiations of its members” (p. 456). Thus, considering each members’ cultural origin as a starting point for negotiation, a new *negotiated* culture emerges which neither is the one or the other culture or a combination of the two, but a new one. Several dimensions influence this negotiation like e.g. the balance of power and influence among individuals and groups, the knowledge individuals already have about the other group’s culture or the status of internationalization of the organization. The authors find four methods of negotiating outcomes: *Compromise by one group*, i.e. one group adapts to certain practices of the other group; *meeting in the middle*, i.e. each group integrates practices of the other group; *innovating something new for both groups*, i.e. the emergence of practices that are new to both groups and *division of labor to minimize need for further negotiation*, where e.g. organizational functions are distributed among participating parties (Brannen/Salk 2000). These methods were, for example, also found by Barmeyer and Davoine (2019) in their study of an international railway joint venture as well as in their research conducted on the French-German television channel ARTE (2014). Yagi and Kleinberg (2011) adapt the concept of negotiated culture to boundary spanners’ negotiation of cross-cultural identities within a bi-national setting and state that the “negotiated culture perspective provides a dynamic view of complex intercultural processes” (p. 633). Interestingly, it does not necessarily require two or more organizational or individual actors from different nations to negotiate culture. In her study on the introduction of an American management system in a Tunisian company, Yousfi (2011) shows how universal best practices were interpreted by the company’s employees drawing on Tunisian cultural metaphors and thus negotiated a new culture. For example, the introduction of a fair contract model with clear objectives and evaluation indicators was meant to abandon the traditional, Tunisian family based model of contracting and leading personnel. The employees made sense of this

new model by understanding themselves as a *big family with written rules*, where contracts prevent personal relationships to interfere with work relations and rules are guiding staff on their way towards higher performance. Romani et al. (2011) summarize that cultural negotiations can take place between organizations, HQ and subsidiaries, professional groups and individuals or even between an individual and the environment (Muhr/Lemmergaard 2011).

### **Multiple cultures**

The notion of multiple cultures does not necessarily stand in a row with the constructive cultural concepts presented until now as it is a framework condition rather than a concept that describes what might happen when different cultures interact. It nevertheless is a new kind of understanding which increasingly gets recognized (see e.g. Maimone 2018; Leung et al. 2005) and is an important grounding for this thesis. The notion of multiple cultures can be considered on different levels: On a macro level, applying a *national culture* perspective, Söderberg and Holden (2002) feel that the concept of culture needs a new definition which better accounts for today's increasingly complex, multicultural reality within societies and organizations. While the dominant paradigm for decades of international and cross-cultural research focused on comparing cultures as a rather fixed and homogenous nation-state based concept, like it is, for instance, symbolized in the billiard ball model of colliding cultures (Brannen/Doz 2010), new realities ask for alternative approaches. D'Iribarne et al. (2020) even dedicate a whole book to a new understanding of cross-cultural management and state that:

“Plunging into the universe of each culture, focusing on its wealth and its complexity, shows the extent to which it is unrealistic to seek to grasp it in a few words. A real intellectual engagement is necessary, such as that required to learn a language. And this is the only way for managers to be able to make the best use of the potential of each culture.” (p. 51)

The traditional focus of intercultural interaction research on the interaction of merely two nations or cultures is no longer central (Boycigiller et al. 2004). Changes in technology, communication, economic, political and societal affairs resulted into firms internationalizing and



forming international alliances and thus led to the dissolution of this classical paradigm. Organizations are becoming increasingly multicultural, involving cultural groups on the sub-organizational (role, functional domain, ethnicity etc.), the organizational (single business, conglomerate), the trans-organizational (profession, project/product-based network etc.) and the supra-organizational level (geographic/economic region, western/eastern socialization) (Sackmann/Phillips 2004). Romani et al. (2018) broadly term these two conceptualizations of culture *stable-functionalist* and *dynamically interpretative* respectively. D'Iribarne et al. (2020) draw a similar line between the *attitude scale approach* to study national culture and another, *qualitative and interpretive approach* which is moving away from the notion of national culture. Hofstede (1980; 2001), for instance, views culture in a stable-functionalist way by defining globally valid cultural dimensions. The same accounts for the conceptualizations of culture provided by Kluckhohn and Strodtbeck (1961), Schwartz (2006), House et al. (2004) and Trompenaars and Hampden-Turner (2012). By contrast, d'Iribarne (e.g. 2001), Brannen and Salk (2000), Romani (2008) and partly also Hall (1990) and Thomas (e.g. 2016) describe national cultures in their very own, for that culture specific terms. D'Iribarne (2009), however, integrates these two conceptualizations and advocates that understanding national culture as being both dynamic and diverse as well as stable and shared within a country at the same time is possible: While there is a shared vision of how to live together that is aspired to as well as a general fear or concern which is intended to be avoided within a given society, the way individual members, groups or organizations within this society attribute this meaning to their respective settings or situations might be highly diverse. D'Iribarne et al. (2020) further elaborate this approach drawing on decades of cultural research and providing examples of these central fears and ideal ways of living together. It resonates well with the multiple cultures perspective as it allows to speak and think of culture on a smaller level than a country resulting into many different ways of giving meaning while at the same time these smaller entities are nested into a broader, shared layer of culture which represents some kind of common concern or fear of a given society (d'Iribarne 2020).

On an international level, Sackmann et al. (2011) identify nine practically relevant strategies for effectively managing cultural multiplicity which are visualized in the following graphic.

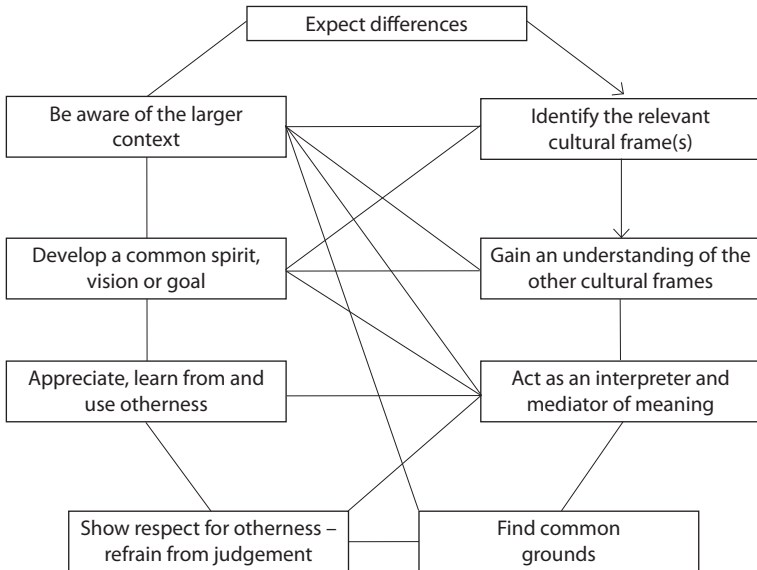


Figure 5 Managing cultural multiplicity and related dynamics (Sackmann et al. 2011, p. 145)

On a meso, *organizational culture* level, Maimone (2018) states that “organizational culture is not a monolithic system, nor a mere puzzle of inconsistent traits, but some kind of multi-dimensional universe, where isomorphism and dis-isomorphism, stability and change co-exist” (p. 20). Thus, there might be multiple and even conflicting organizational identities and cultures observable within the same organization, i.e. “the collective programming of the mind which distinguishes members of one organization from another” (Hofstede 1991, p. 262) might be different for different organizations, between subsidiaries or a product or market division, between functional departments and hierarchical levels or even between work groups (Hofstede 1998), whereat each level’s values are both shaped by the subordinate level’s values and differentiating it from other entities by simultaneously having own values (Leung et al. 2005). Subcultures might exist which are conflicting

with one another or the broader company's culture because of different experiences and learnings made (Schein 2016). Maimone (2018) draws the following visualization of a multi-level model of a multinational company's culture:



Figure 6 The multi-level model of MNE culture (Maimone 2018, p. 23)

For Söderberg and Holden (2002), managing multiple cultures-realities within organizational boundaries is directly related to transferring knowledge, organizational learning and networking – a web of inter-related concepts which is reflected in their new definition of cross-cultural management:

“The core task of cross-cultural management in a globalizing business world is to facilitate and direct synergistic interaction and learning at interfaces, where knowledge, values and experience is transferred into multicultural domains of implementation.” (p. 113)

Thus, cross-cultural management is currently heading towards new horizons, both in its constructive understanding of culture and cul-

tural differences as in its focus on synergy and learning and represents a more than interesting and exciting field of research. The constructive conceptualization of culture holds that cultural differences can be made productive and considers interculturality and cross-cultural interactions as a resource (Barmeyer 2018). This perspective on culture is inherent to the notion of intercultural OD and thus represents an important foundation for the following chapter.



## 4 Intercultural organizational development – State of the field

The present chapter lays the theoretical foundation for the thesis' second main topic of intercultural OD by, first, taking a look at organizational learning being a central part of OD as well as its intercultural dimension. Chapter 4.2 then focuses on the history and central characteristics and models of the field of OD as well as on concepts and theories related to intercultural OD. All concepts which are presented in the following will be integrated into one guiding yet dynamic framework step by step for the second research phase's data analysis.

### 4.1 Intercultural organizational learning

#### 4.1.1 Organizational learning

Before the intercultural dimension of organizational and individual level learning is discussed, an overview over organizational learning in general shall be provided. That an organization is able to learn and gain storable knowledge was first formulated by Cyert and March in 1963 (Easterby-Smith/Lyles 2011). Organizational learning is central for an organization's survival and success (Argote/Miron-Spektor 2012) and may even be the only real sustainable competitive advantage for organizations (Senge 1990), not least because it allows organizations to adapt to their environment (Cyert/March 1963). Learning on an individual level is frequently used to describe the act of taking in information, although it is much more than that:

“Real learning gets to the heart of what it means to be human. Through learning we re-create ourselves. Through learning we become able to do something we never were able to do. Through learning we perceive the world and our relationship to it. Through learning we extend our capacity to create, to be part of the generative process of life.” (Senge 1990, p. 14)

The organization's individual members are central for an organization to learn: "An organization's commitment to and capacity for learning can be no greater than that of its members" (Senge 1990, p. 7). This quote implicitly contains the main distinction between organizational and individual learning: It's "the notion of agency. Just as individuals are the agents of organizational action, so they are the agents for organizational learning" (Argyris/Schön 1978, p. 19) Thus, organizational learning happens as soon as its members experience a positive or negative outcome of previous action and they keep or adapt their way of acting accordingly which ultimately needs to get embedded into the organization's memory. This then again guides individuals in their future actions. Without this last step of embedding the learnings into the organizational routines and practices respectively the invisible and very often tacit "organizational theory-in-use" behind them, learning stays at the individual level. Argyris and Schön refer to this process as single- and double-loop learning (Argyris/Schön 1978), a distinction that Cyert and March (1963) already started to think about. In addition to that, they propose a third level or step of organizational learning called deutero learning, i.e. learning how to learn (Argyris/Schön 1978). The notion of routines and practices and the tacitness of the organizational theory-in-use makes one think about the relation of learning to an organization's culture: For Schein (2016), a central element of an organization's or group's culture is accumulated and shared learning. He states that in order to "fully understand a given group's culture, we will need to know what kind of learning has taken place, over what span of time, and under what kind of leadership" (p. 6). Following on that, one can think of culture as a product of shared learning and thus of the organizational theory-in-use as very similar to the most deeply held and often unconscious basic assumptions of an organizational culture. Schein additionally highlights that these basic assumptions or theories-in-use are extremely difficult to change (Schein 2016).

Argyris and Schön (1978) propose some questions that might be asked in order to evaluate whether organizational learning resulting from individual learning has occurred: Was there an outcome observed by individuals that didn't fit with their expectations based on the current organizational theory-in-use? Did these individuals dig into and

inquire into the nature of this outcome? Were the results of this inquiry encoded in the organizational theory-in-use and did individuals in the following act accordingly even in case of the departure of the individual who initially was responsible for this learning? And ultimately, do new members of the organization automatically learn these new patterns during their socialization within the company? Thus, the encoding into the organizational theory-in-use is mandatory in order for organizational learning to occur. The model of single-, double- and deuterio learning proposed by Argyris and Schön (1978) is widely accepted even in newer work on organizational learning as it is used as a basis to set up new frameworks around organizational learning (Bartel-Radic 2013; Vera et al. 2011).

Apart from Argyris and Schön (1978), this study will frequently draw on Peter Senge's book "The fifth discipline" as it marks another watershed in the field of organizational learning and is among the most cited works in the field. Although he was not the first to coin the notion of the learning organization, it was his book which triggered huge interest into the topic of both science and practice (Easterby-Smith/Lyles 2011). A learning organization is "an organization that is continually expanding its capacity to create its future" (Senge 1990, p. 14) and is not merely focusing on surviving. Senge (1990) names five disciplines or dimensions which are critical for an organization to learn: *Personal mastery*, i.e. people's commitment to their lifelong learning as they "consistently realize[s] the results that matter most deeply to them" (Senge 1990, p. 7); *mental models*; i.e. becoming aware of one's own deeply held assumptions and pictures of how we make sense of the world and our respective actions, bringing them up, questioning them and potentially revising them; *building a shared vision*, which is truly shared and not dictated by leaders and which then makes people outperforming and wanting to learn; and *team learning*, which starts with dialogue in the sense of "thinking together" and is fundamental for organizational learning; and the fifth and overarching discipline *systems thinking*, i.e. realizing that events that may seem to stand for themselves are influencing other events and are connected to them. All these disciplines are connected and are enhancing each other, thus, a systems thinking is underlying their entirety and aiming at integrating them in order to make organi-



zations learn (Senge 1990). The learning organization is the ideal type of organization which has the capacity to learn and prospers because of that. Organizational learning, by contrast, is the actual process of learning and understanding it from an academic point of view (Tsang 1997).

DiBella (2011) criticizes Senge's (1990) conceptualization of the learning organization as well as Argyris and Schön's (1978) process of single- and double-loop learning, as their works reflect the view that organizations either learn or do not learn and are homogeneous, structured systems where the concrete style of learning is the same across the whole organization. Instead, he proposes to think of an organization as a learning portfolio. The following table visualizes the major differences between these two perspectives.

|                                | <b>Organizations as learning portfolios</b>  | <b>The learning organization</b>                                   |
|--------------------------------|--|--|
| <b>The world is...</b>         | Uni-modal: All organizations have learning capability                                  | Bi-modal: There are organizations that learn and those that do not |
| <b>Source of learning</b>      | Organizational existence   | Strategic action promotes the prerequisite conditions              |
| <b>The role of culture</b>     | Culture is created and survives through embedded learning processes                    | Organizations must have the right culture for learning to occur    |
| <b>Organizations are...</b>    | Heterogeneous: Complex organizations house different structural units and sub-cultures | Homogeneous: Organizations learn systematically or they do not     |
| <b>Learning style</b>          | Multiple and complementary, or in conflict   | Learning processes are singular and specific                       |
| <b>Managerial focal point:</b> | Understanding and appreciating current capability                                      | Innate organizational disabilities which prevent learning          |

Table 1 Organizations as learning portfolios versus the learning organization (adapted from DiBella 2011, p. 186f)

Looking at this table, two fundamentally different paradigms become visible. For this study, however, Argyris and Schön's (1978) and Senge's (1990) work will serve as a foundation due to their continuing success and outreach within the world of both science and practice (Calhoun et al. 2011; Chuen Huang/Shih 2011; Gairing 2017; McClory et al. 2017; Robinson 2001; Steiner 1998). Their works' continuing relevance is shown by their application to new phenomenon which only recently gain more and more attention (Hansen et al. 2020). At the same time

and very much in line with a dynamic and emic understanding of culture, their work shall be treated as a framework, a starting point which is subject to changes of whatever kind the collected data requires.

The notion of team learning as being one discipline of the learning organization (Senge 1990) is also highlighted by other authors as teams constitute the key learning unit within organizations (Knapp 2010; Nonaka/Takeuchi 1995; Romme 1997). Romme (1997), however, argues that hierarchies are necessary in order to “store” the learning results of a team and transfer them to other places within the organization. Roloff et al. (2011) point to a newly recognized stream of research concerned with investigating learning *across* teams, facilitated by multiple team memberships where individuals serve as conduits (O’Leary et al. 2011). Further investigation into this new dimension of team learning would allow to actually draw the connection between team and organizational learning and would thereby shim the argument that team learning is essential for organizational learning (Roloff et al. 2011).

But what makes individuals, teams and organizations learn? Argote (2013) defines organizational learning as the „change in the organization’s knowledge as a function of experience” (p. 31). When studying learning in organizations it is therefore necessary to look at the experiences the organization and its members make by which learning is initiated. Argote (2013) provides an overview about different types and dimensions of experience, ranging from direct vs. indirect, success vs. failure, location, timing, novelty and heterogeneity of experience. Especially relevant for the present research project are the dimensions of success/failure and the novelty of experience. The later one refers to whether a certain task is performed for the first time or already has been performed several times in the past. In both cases, learning from the experiences made is possible: In the first one the organization explores, in the second one it exploits learning from experiences. Here, the vulnerability of exploration lies in the fact that it is more uncertain and needs more time in order to assess its usefulness. This is why organizations, whenever they seek to adapt to its environment, tend to do that by exploiting existing knowledge more rapidly (March 1991). A core dilemma organizations are confronted with when it comes to learning from experiences is that, very often, decision makers are not able to

directly observe the impacts of the decisions they have taken. This is especially true for leaders who design long-term strategies for the organization, thus take very important decisions but are frequently not able to *directly* observe their consequences (Senge 1990). As will be shown later, the particular transfer project under study was new to the organizational unit in terms of the overall approach of creating the practice, transferring it and engaging with recipient units during the transfer process. Another important dimension is learning from success or failure experience. Argote (2013) proposes that learning from contrasting success and failure is particularly beneficial – which is the case in the present study as well. Thus, in general, reflecting on the effects of a specific action is an important and even mandatory part for that learning can take place (Bijlsma 2015; Knapp 2010). It has been shown that reflexive teams have a higher performance, as they, for instance, identify problems earlier and are better able to take team decisions (West 1996) or are more proactive and more long-term focused than non-reflective teams (Edmondson et al. 2001). In his earliest considerations on the notion of action research Kurt Lewin (1946) stated:

“If we cannot judge whether an action has lead forward or backward, if we have no criteria for evaluating the relation between effort and achievement, there is nothing to prevent us from making the wrong conclusions and to encourage the wrong work habits.” (p. 35).

Or in other words, “[i]nquiry in action can lead to learning from experience” (Torbert 1972, p. iv).

This philosophy is also reflected in another model of organizational learning that shall be introduced shortly: The organizational learning cycle proposed by Dixon (2019). Drawing on Kolb’s (1984) experiential learning cycle on individual level, Dixon’s model involves four similar steps of generating, integration, interpreting and acting on information which – carried out together – constitute organizational learning. Figure 7 visualizes this model.

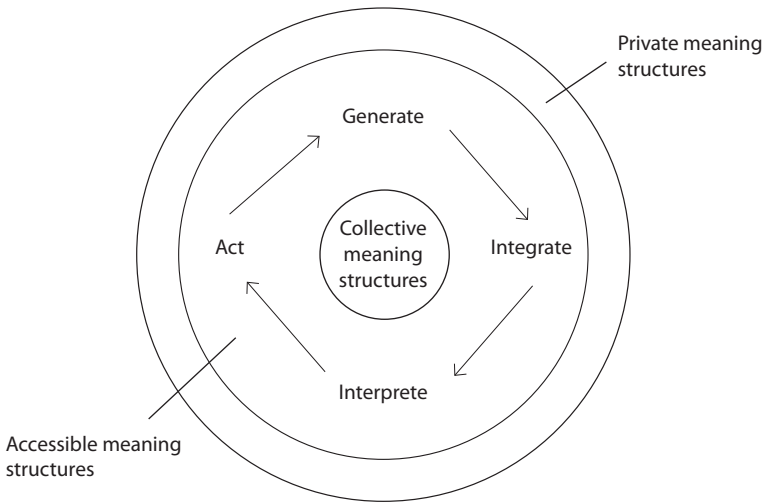


Figure 7 The organizational learning cycle (Dixon 2019, p. 64)

In the first step of the cycle it is all about collecting information from external and internal sources, i.e. information from outside and within organizational boundaries. It's critical that both internal and external information is collected by those organizational members who actually further work with it. Internal collection of information includes the analysis of successes and failures and potentially also the execution of experiments in order to gather new information. In the second step of the cycle, the information needs to get integrated into the organization's context, i.e. understanding the information in the context of the company's whole picture (Dixon 2019). This step reminds one of Senge's (1990) fifth discipline systems thinking, as it's all about understanding the information's contribution to the shared goal of the company as well as its interrelationships with other information. Thus, disseminating the information across the company is vital – which again might be a complicated and challenging process (Dixon 2019). Having access to relevant information, however, is only one part of the cake: The third step, therefore, focuses on collectively interpreting the information that was collected. Central for interpretation is that it happens collectively, so that

“each person is influenced by the meanings others hold and in turn influences the meanings of others. Each better understands the reasoning and data others are using to arrive at their meaning; thus they understand others’ meanings more fully and by comparison, understand their own more fully [...] if organizational members fully invest themselves in collective interpretation, they will understand the parameters of the problem more clearly.” (Dixon 2019, p. 104)

This step is covered by organizational dialogue which also questions current routines and assumptions (Dixon 2019), just like Argyris and Schön (1978) consider it in their conceptualization of single- and double-loop learning. Finally, the last step of the cycle refers to the organization authorizing organizational members to act on the knowledge they have gained from the collective interpretation of information.

The organizational learning cycle is a useful way of looking at the actual process of organizational learning. Apart from that it shows great similarity with the classical, cyclical process of action research of diagnosing, planning and taking an action, evaluating its consequences and specifying the learnings from that (Susman/Evered 1978). Just like the cycle of generating, integration, interpreting and acting on information leads to organizational learning (Dixon 2019), the action research cycle leads to the further development of the system in that its structures, competencies and relationship to its environment are modified (Susman/Evered 1978).

Thus, in order to sum up this first overview of organizational learning, the following conceptual framework can be drawn: Individuals as the prime actors for organizational learning learn from actions they undertake and the experiences and information they gain in the following. These learnings are then brought to an organizational level by single- and double-loop learning processes which target the routines and practices of the organization as well as its deeply hold values and assumptions – its theory-in-use – facilitated by collective reflection. The modifications then guide further actions. In the following, this initial framework shall be further extended by additional concepts that are shown to be relevant for the present study.

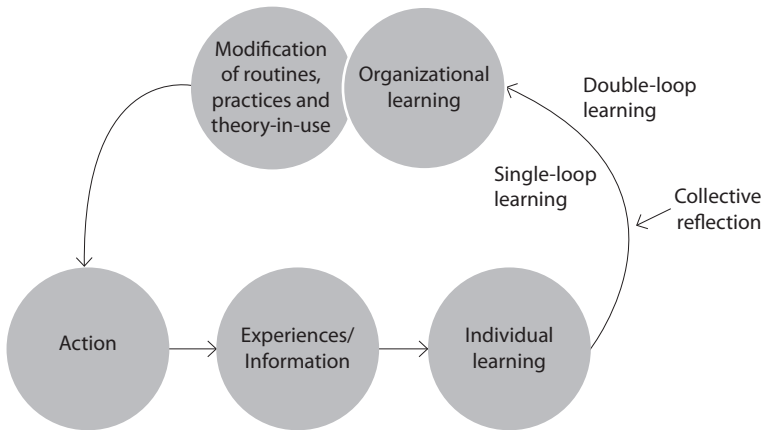


Figure 8 Initial conceptual framework of organizational learning

### 4.1.2 The intercultural dimension of organizational and individual level learning

In our globalized and interconnected world, learning more and more involves an intercultural dimension: On the one hand, multinational companies may benefit from their diverse environments and people as the opportunities for learning and innovation are simply getting more numerous (Taylor/Osland 2011). Different cultural perspectives themselves can be an important resource for learning (Søderberg/Holden 2002; Barmeyer/Davoine 2019) and creativity as it is shown, for instance, by the research on intercultural and diverse teams which are becoming a more and more natural element of organizations (DiStefano/Maznevski 2000). These multicultural teams can foster intercultural learning (Bartel-Radic 2006). On the other hand, increasing cross-cultural interactions require certain competencies in order to be successful, among them intercultural competence (Barmeyer 2018). Bartel-Radic (2006) defines intercultural competence as

“the ability to understand the meaning of intercultural interaction and the ability to adapt one’s behavior to these meanings in order to produce efficient behavior.” (p. 651)

Another, more detailed definition is provided by Thomas (2003):

“Intercultural competence is the ability of capturing, respecting, appreciating and making productive use of one’s and the other’s culturally infused perceptions, judgements, feelings and behaviors in order to mutually adapt, tolerate incompatibilities and develop synergetic forms of collaboration, living together and orientation patterns with regard to interpreting and shaping the world.”<sup>1</sup> (p. 143)

Intercultural competence can be understood as involving three dimensions: an *affective* dimension involving attitudes and personality traits such as empathy, openness, flexibility or the ability to change perspectives and see the world through the other’s eyes; a *cognitive* dimension, i.e. the knowledge a person has about another culture; and a *behavioral* dimension, i.e. the actual behavioral and communicative expression of attitudes and knowledge, for instance, by showing respect and the willingness to listen to others (Gertsen 1990). Intercultural competence can be acquired through intercultural learning, a process comprising understanding what impact cultural differences have, reflecting on that and experiencing intercultural interactions practically. The latter one, combined with a desire to learn, positive emotions and self-reflection on own cultural worldviews is a major condition for developing intercultural competence (Bartel-Radic 2006). Milton Bennett (1993) conceptualizes intercultural learning as a developmental model of increasing intercultural sensitivity, where a learner moves from ethnocentric to ethnorelativistic assumptions and can be supported by different kinds of developmental strategies. A short overview over the six development stages is provided in the following figure:

1 Own translation

|  |                     |  |
|--|---------------------|--|
| <b>Ethnocentric stages</b>   | <b>Denial</b>       | <b>Isolation</b> No exposure to cultural differences   |
|  |                     | <b>Separation</b> Creating distance from cultural differences  |
|  | <b>Defense</b>      | <b>Denigration</b> Negative evaluation of an other culture   |
|  |                     | <b>Superiority</b> Positive evaluation of one's own culture  |
|  |                     | <b>Reversal</b> Negative evaluation of one's own culture, superiority of an other culture                  |
|  | <b>Minimization</b> | <b>Physical Universalism</b> Physical similarities translate into behaviour that is understandable for all |
| <b>Transcendent Universalism</b> Everyone is product of a single transcendent principle, law, imperative |                     |  |
| <b>Ethnorelative stages</b>  | <b>Acceptance</b>   | <b>Respect for Behavioral Difference</b> Recognizing and accepting cultural relativity of behaviour        |
|  |                     | <b>Respect for Value Difference</b> Acceptance of different worldviews                                     |
|  | <b>Adaptation</b>   | <b>Empathy</b> Ability to experience differently in a communication context                                |
|  |                     | <b>Pluralism</b> Development of multiple cultural frames of reference                                      |
|  | <b>Integration</b>  | <b>Contextual Evaluation</b> Analyzing and evaluating situations from one or more cultural perspectives    |
|  |                     | <b>Constructive Marginality</b> Experience of one's self as a constant creator of one's own reality        |

Figure 9 Developmental Model of Intercultural Sensitivity, own visualization (Bennett 1993, p. 29ff)

A central underlying concept of this model is *differentiating*, meaning that individuals differentiate things and events in many ways on the one hand and that cultures differ in exactly these patterns of differentiation on the other (Bennett 1993). The model provides a good orientation in terms of evaluating at which stage a person is, for instance when it comes to develop one's intercultural competence through trainings or workshops (Barmeyer 2018).

Intercultural competence and learning is not limited to an individual-level perspective. Rather, the combination of individual-level intercultural competence and dynamic interactions of these individuals are constituting the organization's intercultural competence (Bartel-Radic 2013), or, in other words, "the prime movers in the process of organizational knowledge creation are the individual members of an organization" (Nonaka 1994, p. 17). An interculturally competent organization



is able to “understand the specifics of intercultural interaction and to adjust accordingly by actively constructing appropriate strategies” (Bartel-Radic 2013, p. 240), which also target the organization’s processes, structures and routines (Bartel-Radic 2013). Similarly, Bolten (2010) defines an organization as being intercultural competent as soon as – beyond the employee’s individual intercultural competence – the organizational and administrative processes are structured in a way that they trigger a momentum of internationally open and interculturally sensitive thinking and behavior within the organization. Thus, intercultural learning on individual and organizational level is a true virtuous circle, mutually enhancing each other. This is also demonstrated by Bartel-Radic (2013) in her adaptation of the double-loop organizational learning model developed by Argyris and Schön (1978). Single-loop learning is achieved by the organization once it fits to its intercultural context while the prevailing values remain the same. In other words: Actions become adapted based on former positive or negative experience, while the underlying assumptions within the organization stay. A polycentric organizational structure is an indicator for single-loop learning as managers have learned that there are cultural differences and that it’s necessary to adapt to them. Double-loop learning, however, happens when the members of the organization question prevailing values and assumptions and shift them towards even higher ethnocentrism (Bartel-Radic 2013). Here again, a close connection to Schein’s (2016) model of organizational culture can be detected: While it is easier to adapt organizational structures, i.e. the rather visible parts of organizational culture, in a single loop learning processes, it is much more difficult to actually change deeply held assumptions and values, i.e. the invisible and largely unconscious parts of organizational culture, in the sense of the superior, double loop learning (see also: Gairing 2017). A model of single- and double learning of intercultural competence is provided in the following:

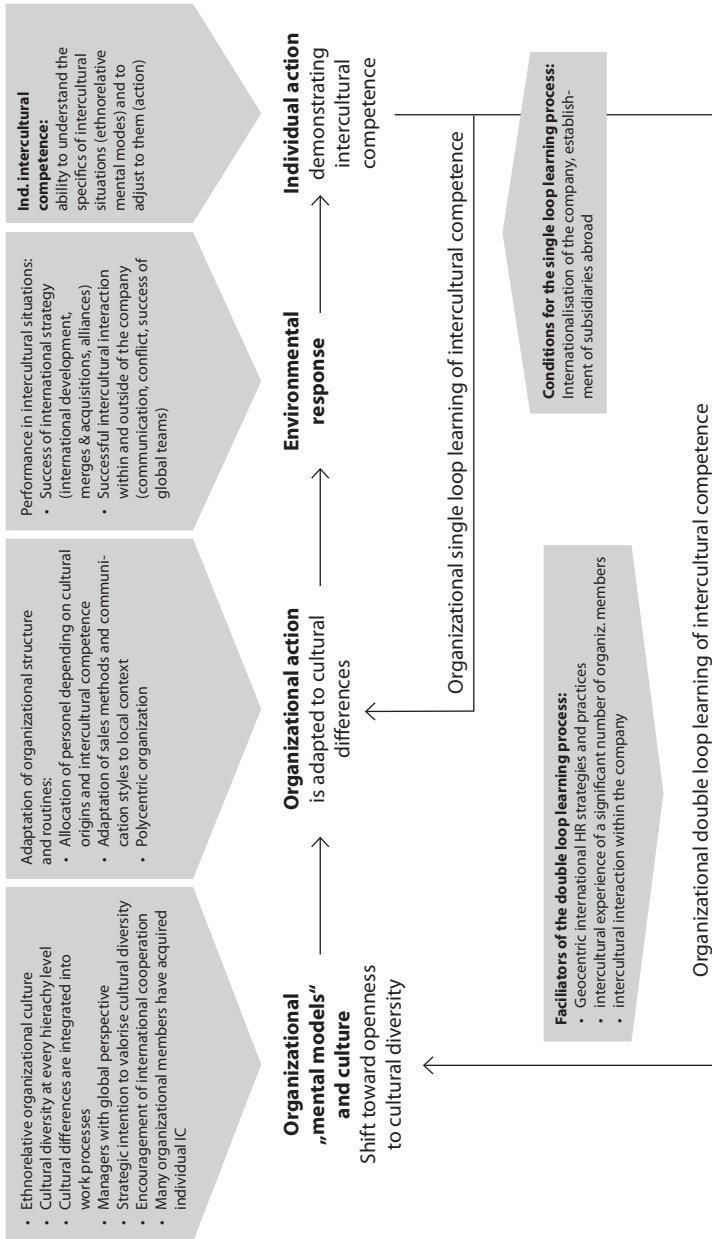


Figure 10 Indicators for organizational learning of intercultural competence (Bartel-Radic 2013, p. 242)

Similarly, Taylor and Osland (2011) summarize three main triggers that may move an organization and its members to a more and more ethno-relativistic instead of ethnocentric attitude: First, unusual or novel experiences which positively impact the company's performance may be a powerful trigger for a change in attitude. Second, on the contrary, a discrepancy between what was expected and what was the result in the end could foster learning. And third, a deliberate initiative, such as a training program or corporate initiative may actively ask the organization and individuals to reflect and rethink current routines and attitudes. Bartel-Radic (2013) names *experience with intercultural situations*, like e.g. expatriation, and *intercultural interactions within a company*, i.e. being in contact with subsidiaries or part of international teams, as very powerful for learning in a double-loop way.

Bolten (2010) adds another interesting perspective stating that an organization's intercultural competence is emergent and cannot really be controlled. However, intercultural *promoters*, i.e. persons who are particularly intercultural competent, can trigger organizational intercultural competence development by acting as a kind of *hinge* between individual and organizational level, triggering learning processes, fostering knowledge sharing, opening up channels of communication and collaboration and building trust.

Far from being complete, this review of literature on intercultural individual and organizational learning has made clear that if the great potential of diversity within organizational boundaries is to be unlocked and used, both individuals and the organization itself need to acquire intercultural competence by intercultural learning. Thus, building on the initial framework of organizational learning drawn above a framework of organizational learning implying an intercultural dimension can be drawn. The newly added terms are marked in black:

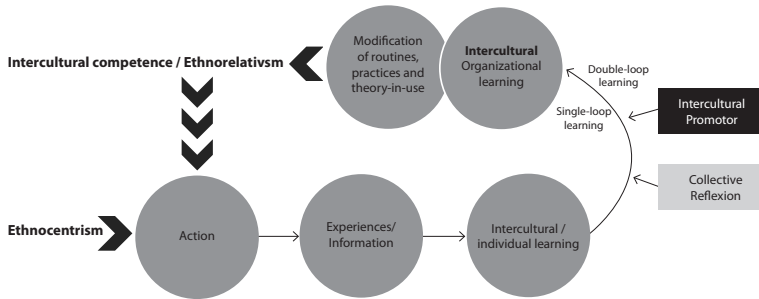


Figure 11 Initial conceptual framework of intercultural organizational learning

As has already been indirectly pointed out, learning always involves changes, e.g. in terms of the organization's knowledge stock (Argote 2013), strategies, structures, processes and culture (Bartel-Radic 2013). "Organizational learning can lead to change which can lead to more organizational learning" (Dixon 2019, p. 3) and therefore is an important and major ingredient of organizational development which shall be shown in the following.

## 4.2 Intercultural organizational development

### 4.2.1 Organizational development

„OD is a concept for the development of organizations, e.g. an industrial company, aiming at actively and flexibly adapting to the challenges of a continuously changing environment. It's a development in the sense of higher efficiency of the organization and higher work satisfaction of all involved individuals.“ (Becker/Langosch 2002, p. 3)

This is how two of the pioneers in the field in Europe define organizational development. Apart from that, there are numerous other ones: Trebesch (2000), for example, counts 50 definitions of OD which seems to be characteristic for a field that has no fixed model or clear boundaries. One could, instead, focus on summarizing central characteris-

tics of OD: It's a long-term development and change process of organizations and their members. This process is based on learning of all involved parties both on individual and on organizational level which in turn is made possible through ensuring that they become involved and actively participate in their own development process. Although a major goal of OD is a humanization of the business world, i.e. fostering an individual's personal growth and development in his or her work environment, it is not merely focused on that. OD is integrative and interdisciplinary in the sense that it centers on social and organizational psychology as well as on business and technological dimensions. From a scientific perspective, OD differentiates itself from other disciplines as it is aimed at developing and *applying* methods, theories and models in organizations (Gairing 2017). This action research focus is central and pioneering for the development and history of OD and is an important component of French and Bell's definition:

“Organizational development is a long-term effort to improve problem solving and renovation processes within an organization, especially through a more efficient steering of organizational culture based on collaboration – by taking the culture of formal work teams into account – supported by an OD consultant or catalyst and through the application of theories and technologies of applied social science, including action research.” (French/Bell 1994, p. 31)

Another definition shall be mentioned here because of its brevity and elementariness:

“Organization development is the process of increasing organizational effectiveness and facilitating personal and organizational change through the use of interventions driven by social and behavioral science knowledge.” (Anderson 2019, p. 3).

The roots of OD lie in the USA in the 1940s and emerged mainly from two sociological streams, the T-group and the survey feedback method, which are both closely connected to action research. Both streams and the action research method in particular are mainly stemming from

Kurt Lewin. He realized research projects at the Commission of Community Interrelations in New York where the task of research was to produce political recommendations. Thus, the close connectedness, interaction and interdependence of research and practice was within his main interest and laid the foundation for action research (Gairing 2017) and thus “the heard of OD” (Cooperider/Godwin 2011, p. 4). Another stream that influenced the development of OD was the work of the Tavistock Institute which built on Lewin’s ideas and acted as a bridge between academia and practice (Cooperider/Godwin 2011). The institute’s researchers developed the sociotechnical systems theory which states that each work organization is comprised of a technical and social system – the breakthrough of systemic thinking (Trebesch 2000). The assumption is that the development of both systems need to be integrated instead of searching for isolated solutions (Gairing 2017). Since the late 1980, systemic thinking and theories influenced the field of OD even more in that an organization is considered as a living whole with its own dynamics and little predictability (Barmeyer 2018). Executing change is no easy endeavor in these constantly living systems. Rather, the main question shall be how change can be *grown* (Bradbury et al. 2008) and how one “might help change agents think of finding opportunities for change within what is *already happening*” (Bradbury et al. 2008, p. 89).

A central and for this dissertation especially relevant model in the field of OD is the learning organization. As already shown in chapter 4.1.1 Senge (1990) has shaped the notion of the learning organization especially through his fifth discipline systems thinking. He illustrates the interdependence of management, learning and change and clarifies that an organization in order to “create its future” (Senge 1990, p. 14) in a fast-changing world needs the ability to cope with those changes which in turn requires a culture of reflection and learning within the organization (Gairing 2017). OD aims at organizational change which can only be achieved through an integrated learning process at individual and organizational level. How these two learning levels interact has already been shown in chapter 4.1.1. The simultaneity and integration of individual and organizational learning within OD is another indicator for its systems orientation (Sievers 2000). Key for learning in the frame-

work of OD is learning from experience. OD is not about making up abstract and fictional organizational questions that are to be answered by the members of the organization, but rather about working on and with their actual reality. Theoretical considerations might merely add to the experiences made. For learning from experience it is not sufficient to just experience but instead, the actual experience needs to be complemented by reflecting on it. Reflection then can be the basis for change and development (French/Bell 1994).

Similarly, OD is closely connected and interrelated with the method of action research insofar as since Lewin's time the realization prevails that human systems can only be understood and changed if the members of the system are involved in the inquiry on them. Letting the learners take part in their own learning process and jointly map what's happening in the organization represents a core idea of OD (Schein 2000). French and Bell (1994) consider action research both as a process and method for problem solving. Thus, action research can be, on the one hand, defined as

“a process of systematically collecting empirical data about a system related to their goals and needs; based on the feedback of this data to the system and additional hypothesis actions will be developed which aim at changing single system variables; the outcomes of these actions will be reviewed and analyzed by collection additional data.” (French/Bell 1994, p. 110)

On the other hand, as a method for solving problems, it is

“the application of scientific investigation of facts and scientific experimentation to practical problems which requires measures to solve them as well as the collaboration and contribution of researchers, practitioners and laymen.” (French/Bell 1994, p. 113)

They state that – given the similarity of OD and action research in terms of their action orientation, both being versions of applied social science and based on data for instance – an effective OD program shall always contain a model of action research (French/Bell 1994) or the other way

round and in the words of Susman and Evered (1978): “AR implies system development” (p. 589).

The target of these action research interventions are most frequently groups and teams, as organizations are organized in groups along different functions which are “the basic building blocks of an organization” (Beckhard 1969, p. 26) and “both reflect and affect the larger organization’s functioning” (Anderson 2019, p. 42). Thus, paying attention to teams and working with them is essential for moving change throughout the organization (Anderson 2019).

Following on this review, the initial conceptual framework of organizational learning can be extended to a framework of organizational development by including the support of the development process by an action researcher and the indication that development in the present case as well as in theory means moving a team within an organization from some kind of present state to an improved state – however this improvement may be defined – over a longer period of time:

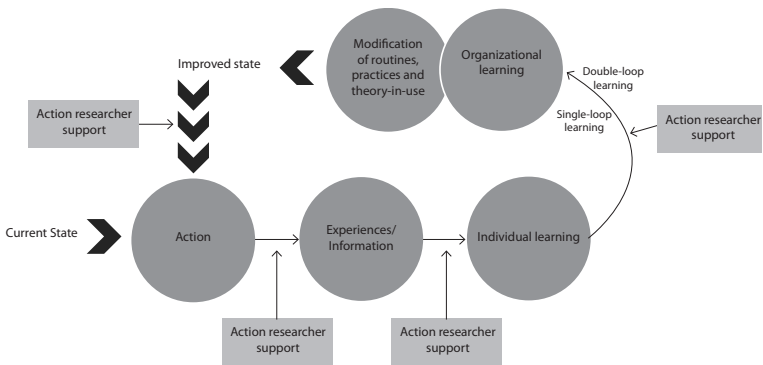


Figure 12 Extended conceptual framework of organizational development

For Schein (2000), in view of globalization and digitalization, future OD needs to support managers and the organization as a whole in managing the complexity of today’s management processes in general, in managing the differences resulting from multiple cultures that interact, in managing interdependence and integration due to bigger and geographically dispersed operations and in managing continuous change



within the global system. He further points out that in order to be able to support here as an OD practitioner, it's necessary to

“identify and go with the natural flow of these processes, to maintain flexibility and objectivity in order to intervene more effectively in the course of our [the OD practitioners] own learning process. We need to acquire an ethnographer's ability of observation and inquiry and an analyst's ability to intervene.” (Schein 2000, p. 28)

This 20 years old outlook on the future of organizational development is certainly more relevant than ever – especially through the notion of managing differences – and provides a perfect link to and basis for the following chapter.

## 4.2.2 Intercultural organizational development

As Schein (2000) already indicated, globalization and the increasing number of intercultural interactions requires to rethink organizational development as a field of research and action in order to better account for today's reality. One – until now pretty underrepresented (Barmeyer 2018) – stream of OD that specifically targets the management of differences and interdependencies of globally dispersed organizational units is intercultural OD. Intercultural OD is defined as

“a continuous and sustainable process of change that concerns the whole organization, namely its strategies, structures, processes and resources, with the goal of achieving effective and appropriate intercultural behavior in the organization. Interculturally oriented organizational development should contribute to the development of a value-added organization as well as to respectful collaboration between employees of different cultures.” (Barmeyer/Mayrhofer 2016, p. 328).

An elementary goal of intercultural OD is moving an organization from an ethnocentric to an ethnorelativistic attitude through intercultural learning (Barmeyer 2010), just like Bennet (1993) conceptualized this

development on an individual level. Intercultural OD is meant to contribute to the organization's value-adding development as well as to the appreciative collaboration of humans from different cultures (Barmeyer 2018). Before going deeper into the topic of intercultural OD, it is useful to take a look at the different attitudes and constellations between the HQ and its subsidiaries. They can be a useful basis for understanding, conceptualizing and retracing the intercultural OD an organization or sub-unit goes through (Barmeyer et al. 2012).

#### 4.2.2.1 Ethnocentricity, Polycentricity and Geocentricity in international business

Perlmutter (1969) is probably the most famous scholar who thought about attitudes and mindsets corporate HQ managers have towards international business units. His concept is still among the most cited ones in international human resource management (Isidor et al. 2011) and continues to be an essential grounding for both theoretical and practical considerations within the field of international management (Kostova et al. 2016). He understood that when it comes to assessing the multinationalism of a corporation, it is crucial to look at the orientation key organizational stakeholders have towards foreign people and ideas:

“The more one penetrates into the living reality of an international firm, the more one finds it necessary to give serious weight to the way executives think about doing business around the world.” (Perlmutter 1969, p. 11)

Another stream of research which is building on Perlmutter's thoughts is formed by Bartlett and Ghoshal (1989): Based on their research into how big multinational companies dealt with the changing environment of the 1980s, they introduce four typologies of multinational companies. Their reasoning about the transnational solution has been and still is very influential in international business research and their typologies are the self-evident basis for many empirical and conceptual research (Edwards 1998; Gupta/Govindarajan 1991, 2000; Kasper et al. 2004; Malnight 1995; Schmid/Maurer 2011; Zellmer-Bruhn/Gibson 2006).

While Perlmutter (1969) considers the executives' mindsets in international business, Bartlett and Ghoshal (1989) take a look at which forms multinational companies can take on in terms of different strategies and structures. These two fields of research are interrelated, first because of overlaps in terms of their concepts, descriptions and ideas and second because individuals in their role as members of an organization shape their organizations through their assumptions, attitudes and actions (Barmeyer 2010). In the following, the connections and relationship between both streams shall be elaborated.

### **Ethnocentricity and the global organization**

The first attitude Perlmutter (1969) describes is called ethnocentricity or home country orientation. An ethnocentric person considers oneself superior to others, as being more reliable than people from other countries. In an ethnocentric organization, complex products are preferably produced at home as foreign subsidiaries would never have the competence to do that as good as the HQ. Benchmark is what works at home, thus, advice and instructions on performance and other criteria just know one direction, i.e. from the HQ to the international subsidiaries. A consequence of an ethnocentric attitude is the pursuit of exporting own management models and assumptions about business culture to the other locations. This is what Adler (1980) conceptualizes as the culture dominance model.

Bartlett and Ghoshal (1998) call a company at this stage *global*. Decision-making is centralized, the world market is considered as one integrated whole and its main driver is global efficiency.

Another view is provided by Adler (2008). Considering the historic evolution of international businesses, she sets up a development model of internationalization and adds an evaluation of the importance of sensitivity towards cultural differences for each of the four development phases. Organizations in a *domestic phase* adopt an ethnocentric perspective without adapting their products to foreign customers' needs due to their uniqueness and lack of competitors which also makes cross-cultural management and paying attention to cultural differences irrelevant. Potential motives to go international in this phase might

be resource- (e.g. energy, natural resources, labour) or market-seeking (Bartholomew/Adler 1996).

How a global company deals with international HR management is shown by Dickmann and Müller-Carmen (2006) in their case study of German multinational companies: One of their sample companies assumed, that their centrally developed HR programs are applicable everywhere and whenever the decision to roll out a program is taken it was done “quickly and powerfully” in order to avoid resistance.

Ever since research on international business is performed, ethnocentricity tends to be considered negative and harmful for a company's performance. In their literature review on how ethnocentrism was treated so far in international business, Michailova et al. (2017) summarize that according to the majority of scholars in this field ethnocentricity needs to be overcome in order for MNCs to keep being successful. However, in its very origins in anthropology, sociology and psychology, the notion of ethnocentrism doesn't have a positive or negative connotation, but is instead neutral. And in fact, there are examples of successful ethnocentric companies: The Japanese transplants in the US which applied Japanese ways of working and were very successful in their industries, companies like Victorinox which count on and capitalize their, in this case, Swissness in foreign countries or Ikea, which trains their store managers centrally in Sweden and thereby promotes intra-group ethnocentrism. A similar case is described by Stahl et al. (2017) when they state that Chinese high-potential workers prefer working for Western companies in China which is why these Western companies make use of their otherness in their employer branding and recruiting strategies in order to attract these talents. Furthermore, Michailova et al. (2017) also point out, that under certain conditions (e.g. in the face of crisis or emergency situations) or in certain industries which face high global competition, a recentralization of decision making might be a good choice. They further warn against attributing ethnocentricity to a MNC hastily and in some fixed definition, as subsidiaries and HQ might perceive it differently and more attitudes might exist in parallel.

### **Polycentricity and the multidomestic organization**

The second attitude managers can take on is termed polycentricity or host country orientation. In a polycentric organization, the opinion prevails – especially on the executive’s side – that host countries know what’s best for them and that therefore, the operations in these countries shall be as local as possible. The result are loosely connected units held together by financial controls. Local environments and people are so different that one cannot use the same weights and balances like at home. There is no exchange in personnel between HQ and subsidiary, subsidiary managers can only dream of filling a position at the HQ and might not even get regularly informed by the HQ. Ironically, in this polycentric organization, ethnocentricity prevails at the different locations (Perlmutter 1969).

In the Bartlett and Ghoshal (1998) typology, a polycentric company is called *multinational*, being sensitive to local demands and thus managing “a portfolio of multiple national entities” (p. 16).

In Adler’s (2008) development model, the second phase internationalizing companies go through is also called the *multidomestic* phase. As soon as competition increases, considering foreign markets needs becomes key and so do culture specific approaches in managing the organization’s operations and employees. In this phase, there isn’t the “one best way” anymore but rather there are now “many good ways”. In their *multinational phase*, then, all competitors in a specific industry produce almost the same products which is why it’s no longer about providing the best fitting product but rather about providing it at the lowest possible price. Culture therefore becomes less important.

Also, in international HR management, examples for a multidomestic orientation can be found, which is, in the case of Dickmann and Müller-Carmen’s (2006) study, “less a question of ability or power than an issue of lacking willingness to integrate and communicate across borders” (p. 594).

### **Geocentricity and the transnational organization**

Ultimately, the third attitude is the geocentric or world-oriented attitude. Here executives do “not equate superiority with nationality” (Perlmutter 1969, p. 13). It’s the best, not the American, Indian or German

who is asked to steer the business and find solutions to its problems. Subsidiaries aren't an extended arm of the HQ nor independent stand-alones but rather parts of a whole incorporating both a global and local perspective. This whole jointly considers where in the world the best location would be to, for instance, build a new production site or launch a new idea. Everybody talks to and supports everybody and subsidiaries don't just want to be a good local company but strive for being the best in their country by benefiting from their simultaneous global integration (Perlmutter 1969).

In Adler's (2008) model, the importance of low prices and high quality from the previous, multinational phase of internationalization, however, become taken for granted in the last phase, the *global or transnational phase*. Therefore, culture and being culturally responsive becomes key in competing successfully against other corporations. It's important to know about and understand customers' needs around the globe. Managing effectively across cultures is fundamental to that.

Dickmann and Müller-Carmen (2006) report from one sample firm which pursued transnational international HR management: This company fostered communication between the different units which allowed, for example, to gather experiences and local ideas centrally at the HQ. Apart from that, subsidiaries were considered experts in terms of local HR management, while the HQ stayed the expert in German and global HR management. Thus, standardization and knowledge networking were both present in this company.

The geocentric attitude is in parts reflected in the third typology of Bartlett and Ghoshal's (1998) *international* corporation in its duality of the company's global orientation and local responsiveness at the same time: The HQ still has influence and control, but subsidiaries can adapt things that are transferred to them, although they don't have much autonomy and independence. The authors detect these three types of worldwide operating companies in their research, but feel that neither type would be able to account for new arising challenges. This is why they introduce the *transnational* solution, which can be considered as the organizational counterpart of Perlmutter's (1969) geocentric attitude: A transnational company's structure can be conceptualized as an integrated framework of dispersed, interdependent and specialized

units. The resulting advantages are immense: The great dispersion of units, for instance, allows for immediately sensing new trends and customer demands wherever they emerge first. The specialization of the units results into realizing economies of scale although the high dispersion at first sight seems to be inefficient in this regard. And lastly, subsidiaries are no longer dependent or independent from the parent company, but rather all units are interdependent, cooperation, information sharing and joint decision making is their reality. However, this cooperation cannot be taken for granted. Each party needs to have a personal, individual interest in order to make cooperation self-enforcing. Bartlett and Ghoshal (1998) report from one example found at Procter & Gamble, where a new Euro brand initiative was initiated, where teams composed of stakeholders from all kinds of subsidiaries were asked to market new products Europe wide, drawing on each subsidiary's expertise and ideas.

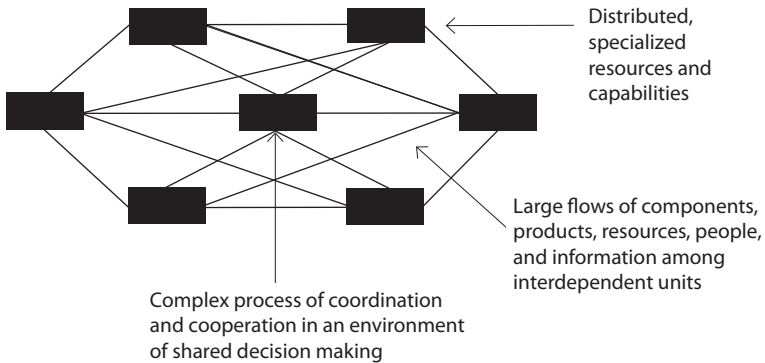


Figure 13 Integrated Network (Bartlett/Ghoshal 1998, p. 102)

In this new conceptualization of a multinational cooperation as a network of interdependent units, the traditional hierarchy between HQ and subsidiary is no longer existing. Subsidiaries rather are "strategic partners whose knowledge and capabilities are vital to the corporation's ability to maintain a long-term competitive advantage" (p. 117). Networks are thus representing "alliances among equals" (Bartholomew/Adler 1996, p. 19). Social interaction, trustworthiness and

a shared vision favor this cooperation within an intrafirm network (Tasi/Ghoshal 1998). Networks don't have a single dominating culture. Instead, "collaborative learning – rather than influence, compromise and adaptation – becomes paramount" (Bartholomew/Adler 1996, p. 24). Organizational networks have the possibility to access globally dispersed knowledge in its units and use it "on a global scale for local responsiveness, global integration and global learning" (Maimone 2018, p. 10). The same accounts for informal networks, a net of informal relationships individuals in multinational companies are establishing to external and internal actors, which allow for identifying knowledge residing in different units and promote learning (Tregastis et al. 2010). Of course, a network structure in itself is not guaranteeing added value: "Cross-culturally speaking, corporate HQs as the network central hub are the true authors of contextual blockages, and as such are unwitting killers of tacit knowledge created in their own international networks" (Gale/Vance 2012, p. 402).

In this setting, subsidiaries can take on different roles depending on their market's strategic importance and their resources and capabilities, ranging from strategic leader, contributor and implementer to black hole. Figure 14 gives an overview over these four roles.

|  |      |             |                  |
|--|------|-------------|------------------|
| <b>Strategic importance of local environment</b> | High | Black Hole  | Strategic Leader |
|  | Low  | Implementer | Contributor      |
|  |      | Low         | High             |

Figure 14 Generic roles of national organizations (Bartlett/Ghoshal 1998, p. 122)

Another characteristic and major advantage of the transnational corporation is its ability to leverage local innovative capabilities and make them usable for every unit within the network and even the possibility to jointly innovate in addition to the traditional centralized and local innovation processes. This is of course no easy endeavor and requires



the management of all innovation processes simultaneously considering the different subsidiary roles and the establishment and usage of linkages among the units in the transnational network (Bartlett/Ghoshal 1998). This resource-oriented perspective on the innovative capabilities residing in different units goes hand in hand with a geocentric attitude in the sense that cultural differences are recognized, valued and used for the benefit of the company as a whole. Cultural synergy, collaboration and learning are notions related to that. Reflections on culture are not any more concerned with cultural dominance, compromise and adaptation but rather with the functioning and dynamics of mutual and collaborative learning (Bartholomew/Adler 1996).

In order to conclude this chapter, the following table provides a comprehensive overview over the three strategies, their respective understanding and treatment of cultural differences as well as some other characteristics.

|   | <b>Ignoring</b>    | <b>Downplaying</b>   | <b>Using</b>                 |
|---|--------------------|----------------------|------------------------------|
| <b>Assumption:<br/>Culture is</b>                       | irrelevant         | A problem            | A competitive edge           |
| <b>Relationship<br/>between HQ and<br/>subsidiaries</b> | Ethnocentric       | Polycentric          | Geocentric                   |
| <b>Expected<br/>advantage</b>                           | Standardization    | Localization         | Innovation                   |
| <b>Performance<br/>criteria</b>                         | Efficiency         | Adaptability         | Synergy                      |
| <b>Biggest challenge</b>                                | Gaining acceptance | Reaching consistency | Making use of<br>differences |
| <b>Biggest problem</b>                                  | Inflexibility      | Fragmentation        | Confusion                    |

Table 2 Strategies of approaching cultural diversity (Barmeyer 2018, p. 26f, adapted from Schneider/Barsoux 1997, p. 211)

Perlmutter (1969) acknowledges that the described attitudes never exist in their pure form. Rather, each corporation has a certain EPG-profile. Companies, for instance, may individually choose the best attitude for each new context, both in terms of the single subsidiary concerned as in terms of the practice that either requires more or less standardization or local adaptation respectively (Myloni et al. 2004). Similarly,

Bartlett and Ghoshal's (1989) typology is not generalizing the role of subsidiaries for each type. Instead, a multidomestic company might have relatively many subsidiaries that enjoy great autonomy, while in a global company, the percentage of receptive subsidiaries is high and in transnational firms, subsidiaries tend to be very active (Harzing 2000).

A number of studies build on and work with the attitudes and typologies proposed by Perlmutter (see, for instance, Kostova et al. 2016; Mahmoud 1975; Simmonds 1985; Tanganelli 2018) and Bartlett and Ghoshal (1989): Plakothnik et al. (2015), for instance, take a look at the way employees of multinational companies experience their company's geocentric culture with the result being that they felt connected, valued and personally and professionally growing within a geocentric organizational culture. Isidor et al. (2011) link the strategies to process theories of internationalization and find that, for instance, elder companies which have gone through longer learning processes tend to apply more regiocentric or geocentric staffing strategies. However, they also find that young companies can leap-frog early stages of Perlmutter's model once they have access to networks. Harzing (2000) conducts a quantitative survey study in order to test the existence of Barlett and Ghoshal's (1998) typology of the multinational company and was able to confirm them. Kasper et al. (2004) empirically investigate the relationship between the type of the multinational company and the way of transferring knowledge and find that first, the global type can be considered as a global hierarchy where the HQ acts as global innovator, the subsidiaries as implementers and knowledge transfer intensity is low; second, that the multidomestic type can be considered as a federation, where both HQ and subsidiaries act as local innovators and the intensity of knowledge transfer is a bit more than in the global type; and third, that the transnational type can be seen as a heterarchic network of integrated players where the knowledge transfer intensity is high.

According to Perlmutter (1969) every company shall strive and develop to become geocentric in more and more organizational functions, but "the route to pervasive geocentric thinking is long and tortuous" (p. 16). Equally, Bartlett and Ghoshal (1998) state that the transnational organization is an "idealized organization type" which "is not easy to develop and manage" (p. 66), but which increasingly *is* becom-

ing real and represents the best response to complex and changing environments. Apparently, there is a trend towards more geocentricity and less ethnocentricity in the world of international business (Plakhotnik et al. 2015). A non-ethnocentric attitude is considered to be mandatory in culturally diverse environments – just like Carlos Ghosn describes here:

“A sense of humbleness is important. Arrogance is one of the reasons for which many mergers and acquisitions in our industry didn’t work: You generally have one executive or one management team that is very arrogant, thinking that they know everything, and they are going to teach the others what they have to do. It doesn’t work this way. It’s always a ‘give and take’, and even the company that is weaker or smaller has a lot to teach the stronger company.” (Stahl/Brannen 2013, p. 497).

#### 4.2.2.2 Complementing thoughts on the HQ-subsiary relationship

Barmeyer (2010) draws a rather gloomy picture of the current state of geocentricity by stating that instead of geocentrically exploiting the tremendous knowledge base, most companies ethnocentrically ignore this base or polycentrically don’t integrate it into the organization as a whole. Edwards (1998) – although referring to research from more than 20 years ago from today – also summarizes that there are almost no examples of transnational companies. The primary driver of establishing a geocentric attitude are key managers of the corporation displaying a global mindset, as they shape the firm’s strategy and thus lay the foundation for designing multicultural interactions valuably (Adler 2008; Barmeyer/Maryhofer 2016; Bartlett/Ghoshal 1987; Stahl/Brannen 2013). Especially during the development of an organization towards an interculturally competent one, an ethno relativistic attitude demonstrated by leaders is essential. More and more managers in positions where intercultural interactions are daily business have a multicultural background (Barmeyer/Maryhofer 2016). This holds true as well for example for Carlos Ghosn, who has been already cited at various occasions and who again formulates appropriately about the role of interculturally competent leaders:

“Everybody has to be a manager of diversity, but especially senior executives because people always look to the top. They look at the top and say, ‘OK, is he doing what he is saying?’ If employees see top management talking about openness and learning – but they see an arrogant person who is closed down – they will not take it seriously. So the top management in a multicultural environment has an important role: They must walk the talk.” (Stahl/Brannen 2013, p. 497).

Considering the topic of leadership in a more extensive way would have been beyond the scope of this dissertation. However, the role modelling of managers like it is advocated for by Carlos Ghosn when it comes to shaping the ethnorelativistic attitude of the organization as a whole, is one of the core principles of Frey’s principle-based model of leadership (Frey et al. 2006; Peus/Frey 2009) and shall play an essential role in the empirical example of intercultural organizational development of this thesis. The principle-based model of leadership describes core needs people have and which shall be identified and addressed by leaders’ culture and behavior. The principle of being a role model describes how conscious leaders need to be with regards to their role model function in both human and functional terms and is based on the assumption that people only are committed if there is a human role model. This also implied to not only speak about having certain values, but also display them visibly in one’s own behavior.

Bringing this individual ethnorelativism to a collective, organizational level is a challenging undertaking (Barmeyer/Mayrhofer 2016) and is – in the understanding of the present thesis – a core task of intercultural organizational development and its inherent double loop learning. Apart from the major impact of executives’ attitudes, there might be dynamics within the relationship between the HQ and subsidiaries which additionally favor – or impede – the development of a geocentric attitude on an organizational level which shall now be quickly summarized.

### **Weight and voice**

What might also influence a company’s attitude towards their international subsidiaries and additionally explains the heterogeneous picture of attitudes and strategies that are displayed within the same company is

shown by Bouquet and Birkinshaw (2008) in their analysis of the weight and voice mechanisms subsidiaries employ in order to attract the HQ's attention. They define attention in this case as "the extent to which a parent company recognizes and gives credit to a subsidiary for its contribution to the MNE as a whole". The amount of attention a HQ gives to its individual subsidiaries is on the one hand dependent on the subsidiary's *weight*, i.e. its location in a strategically significant or less significant market and its strength within the network in the sense of other subsidiaries being dependent on what it contributes to the whole. On the other hand, HQ's attention depends on the subsidiary's *voice* which is based on its initiative-taking in the sense of voluntarily expanding its activities towards new products, services and markets as well as on its profile building, i.e. actions that foster the subsidiary's image and reputation within the company as a whole. Generally spoken, it is evident, that HQs might pay more attention to operations in major markets like the US, China or Europe whereas markets in Africa and Latin America aren't considered that important (Bartlett/Ghoshal 1998). However, the weight and voice of a subsidiary might not only impact on how much attention the HQ attributes but also on which attitude it employs towards that specific subsidiary. For instance, a subsidiary that has neither much voice nor high weight might be acting largely autonomous in the sense of a polycentric orientation. By contrast, highly significant subsidiaries might be either influenced to a large extent in the sense of an ethnocentric orientation or on the contrary, are seen as partners on eyelevel in a geocentric sense. Similarly, a geocentric attitude might be applied towards voice-full subsidiaries.

### **Power**

Furthermore, Ferner et al.'s (2011) considerations about the power relations between HQ and subsidiary – originally developed within the framework of international practice transfer – could add to that. While according to the mere metaphor of the parent company and its subsidiaries, thought off as children<sup>2</sup> the HQ is the more powerful actor

<sup>2</sup> Consider for example the German translation of subsidiary as *daughter organization* (Tochtergesellschaft)

(Bartlett/Ghoshal 1998), both HQ and subsidiaries exert power over resources, power over processes and power over meaning. Power over resources is related to finance and knowledge for instance. Most frequently, it's the HQ that possess this sort of power, but also subsidiaries might add a lot to the whole company both financially and knowledge-wise. Power over processes is mainly a domain occupied by HQs and is exerted through formal policies, enforcement and monitoring mechanisms. Subsidiaries nevertheless can influence the very nature of these policies, e.g. in case they are strategically important for the total company's revenues. Last but not least, having power over meaning the HQ shapes the organizational culture, codes of practices and standard procedures. It also may define what profitability or competitive advantage means as well as the corporate language and a certain kind of "company speak" (Logemann/Piekkari 2015). Here again, subsidiaries have the possibility to contest these meanings (Ferner et al. 2011). For example, the very act of translation gives power over meaning to the subsidiary, as is shown by the following example:

"From the perspective of HQs, [the subsidiary's manager] contested the meaning system of the new strategy, which was introduced in English, by ignoring company speak and translating all core terms into the local language. Moreover, he added his own explanations to the translations of the president's letters. Such behavior undermined the president's effort to create a share terminology to support global alignment." (Logemann/Piekkari 2015, p. 42).

Depending on the distribution of these types of power, the result could be an ethnocentric, polycentric or geocentric organization. For instance, if a company HQ accounts for and makes use of its high power in all three categories, its orientation might be rather ethnocentric. If power is distributed equally with both subsidiaries and HQs contributing to the amount of financial resources and knowledge, jointly negotiating policies and standard processes as well as meaning systems, the organization could be termed geocentric. In their study on how language and translation influences HQ-subsidiary power distributions Logemann and Piekkari (2015) relate these distributions to the company's deve-

lopment from a rather federation-like organization to a more and more globally aligned company that in the end shared a common “company speak” which “became an important enabler of knowledge sharing [...] and added a sense of belongingness” (p. 47).

As has been shown, there is a multitude of dynamics working when it comes to evaluating a company’s attitude and orientation towards its international subsidiaries. The same accounts for its intercultural development which shall be the topic of the following chapter.

#### 4.2.2.3 Dynamics of intercultural organizational development

How does then an organization’s intercultural development look like? In the past two chapters, the basics of organizational development in general as well as the major contributions on HQ-subsidiary constellations and attitudes have been introduced and provide a useful basis for understanding the intercultural dimension of organizational development. Barmeyer (2018) highlights the importance of stage development models for describing and promoting an organization’s intercultural development. In the following, a number of stage models respectively concepts which specifically take the development or transformation of an organization into account will be introduced.

An evolutionary perspective on the development of an organization from an ethnocentric to a more and more geocentric stage is offered by Malnight (1995) who – criticizing previous research that merely described and contrasted international organizational strategies – takes a look at the evolution of one particular sample company. Although drawing on Perlmutter’s (1969) EPR categorization, culture plays no explicit role in his study. Malnight defines four development stages: *Appendage* (subsidiary tasks limited to downstream activities, centralized decision making), *participation* (subsidiaries take part in important tasks to better meet local demands), *contribution* (subsidiaries’ expanded activities used for global – instead of local – requirements) and *integration* (of units to strengthen both international and local operations). The author highlights that it is not the whole company which goes through this development but rather individual functions of it. Not each and every function will reach the integration phase nor will

individual functions enter the next development stage at the same point in time or pass through the stages linearly one after another. Each stage requires different foci of organization ranging from *directing* activities worldwide based on home-country strategies to *managing* the development of resources at the subsidiaries and *supporting* them in upgrading them until *coordinating* and building linkages between the units. Although one might be tempted to assign an evolutionary perspective to Perlmutter's (1969) and Bartlett and Ghoshal's (1989) thoughts before as well, Malnight's (1995) study nevertheless is an important empirical contribution to this field and demonstrates once more the complex and dynamic nature of a globalizing company.

Apart from that, in the second edition of their *Transnational Solution*, Bartlett and Ghoshal (1998) take a look at how a company can transform itself into a transnational one. They take on a biological terminology in order to describe which organizational characteristics need to undergo change and to demonstrate that this transformation needs to be holistic, i.e. encompassing all of the following dimensions: They state that an organization's *anatomy* in the sense of its structure and formal relationships, responsibilities and authorities needs to be revised, as well as its *physiology*, i.e. the information flows through formal and informal channels and its *psychology*, i.e. its explicit and implicit shared values and beliefs in order to become truly transnational. Especially the last dimension is not to be underestimated as missing to modify the psychology of a company can lead to "mechanical responses without understanding and commitment" (p. 290). The authors witness two different approaches, each placing different emphasis on these dimensions and therefore approaching a change in them in a different order: While the traditional change process first targets the organization's structure which then has implications on interpersonal relationships and flows of information which again may result into a change in values and beliefs, they favor the second approach, which starts first with transforming the organization's psychology. Figure 15 shows the resulting process.



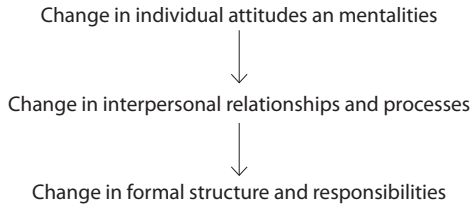


Figure 15 The emerging change process towards a transnational organization (Bartlett/Ghoshal 1998, p. 292)

This view in its holistic understanding of an organization is shared with the systemic perspective of OD as it is seen as a holistic undertaking integrating the development of both the technical and social system of an organization (Trebesch 2000). The same applies to intercultural OD: A geocentric attitude needs to be reflected in the organization's practices and structures in order to be effective and sustainable. This is exactly what intercultural organizational development aims for – a sustainable transformation of the company's strategies, structures, processes and resources for the sake of effective intercultural behavior, i.e. developing an organization through intercultural learning from an ethnocentric to an ethnorelativistic attitude (Barmeyer 2010).

Central for this thesis is the *Fürberger Matrix*, developed by Barmeyer et al. (2012): They take Perlmutter's (1969) EPG attitudes as development phases an organization passes on its way towards geocentricity and set up a matrix which helps evaluating an organization's status-quo with regard to the respective development stage (Barmeyer et al. 2012). The matrix is shown in table 3.

| Essential elements/<br>cultural strategies<br>as developmental<br>stages | Ethnocentric<br>"Just the one"<br>Position: One position  | Polycentric<br>"One and the other"<br>Position: Both one and the other<br>position   | Geocentric<br>"The new third"<br>Position: A new position  |
|--|---|--|--|
| <b>Identity</b>  | The values and principles of the HQ are decisive for all subsidiaries   | Each subsidiary develops its own strategy and objectives while adhering to certain framework conditions                    | The development of strategy and targets is an interactive, negotiated process involving all parties  |
| <b>Strategy, policy, programs</b>  | Strategy is centrally developed, subsidiaries are given targets to be achieved  | Each subsidiary-develops its own strategy and objectives while adhering to certain framework-conditions                    | The development of strategy and targets is an interactive, negotiated process involving all parties  |
| <b>Organizational structure</b>  | The organizational structure of the subsidiary reflects the organizational structure of the parent company; Important: key functions are centralized; | Subsidiary organizational structure is country-specific; Important key functions are located locally                       | Structures are networked and cross-locational and result from the possibilities and potentials of the individual companies                   |
|  | Key functions at subsidiaries are staffed by HQ managers  | Key functions are staffed by local managers  | Important key functions are located where they make the most strategic sense   |
| <b>People, groups, climate</b>   | Leadership: Uniform leadership and communication culture with the same contents, methods and instruments is prescribed by HQ                          | Leadership: Each subsidiary has its own management and communication culture with specific topics, methods and instruments | Leadership: Through best practices, a new common leadership and communication culture develops with methods and instruments accepted by all. |
|  | Principles of cooperation are set by HQ; cultural differences are disruptive to cooperation   | Cooperation: Cultural differences are insignificant in cooperation because there is almost no exchange.                    | Cooperation: Cultural differences are complementary and enriching  |
|  | Intercultural competence only plays a role on the part of the subsidiary actors (adaptation to the specifications of the head office).                | Intercultural competence of the actors plays a subordinate role because of the low intensity of contact.                   | Intercultural competence plays an important role because of high contact intensity   |

| Essential elements/<br>cultural strategies/<br>as developmental<br>stages | Ethnocentric<br>"Just the one"<br>Position: One position  | Polycentric<br>"One and the other"<br>Position: Both one and the other<br>position  | Geocentric<br>"The new third"<br>Position: A new position  |
|---|---|---|--|
| <b>Individual functions<br/>and institutions</b>                          | Company-wide projects are<br>steered centrally  | Projects are initiated and steered locally  | Projects are distributed according to<br>available resources (e.g. competencies) and<br>steered together   |
| <b>Procedures,<br/>processes</b>  | HQ defines guidelines for work<br>processes; information and knowledge<br>management is centralized; HQ is<br>responsible for innovation          | Subsidiaries have own work processes;<br>information and knowledge is available<br>locally; innovation is decentralized                     | Processes are optimized through experience<br>exchange and value-free appreciation of<br>strengths; innovations circulate and can be<br>used company-wide                                    |
| <b>Physical-material<br/>world</b>  | Standards and systems are developed<br>centrally and transferred to subsidia-<br>ries; central guidelines for work tools<br>and work place design | Local standards and systems within<br>budgetary constraints; problems are<br>solved where they arise; work equipment<br>is procured locally | Standards and systems are chosen as openly<br>as possible and as jointly as necessary, so<br>that they are locally meaningful and<br>appropriate and can be used and recognized<br>worldwide |

Table 3 Fürberger Matrix (own translation, Barmeyer 2018, p. 278ff)

They propose using this matrix in practice as a tool for analyzing the starting point during an OD intervention which targets at accompanying the organization in its development towards increased intercultural competence (Barmeyer et al. 2012). Within such interventions, it is essential to not tap into the ethnocentric trap oneself but instead continuously check whether the interventions are fitting the cultural backgrounds of the involved actors. Boundary spanners can be an important resource in that they can take on both the HQ and subsidiary perspective (Barmeyer 2018).

Apart from Malnight (1995) who provides an empirical example of an organization who developed from an ethnocentric to a geocentric organization, examples in the broader framework of intercultural organizational development are rare. The study of Muratbekova-Touron (2008) is one amongst few and, although naming her paper “From an ethnocentric to a geocentric approach to IHRM”, she doesn’t really touch on the issue of intercultural organizational development. She investigates the cultural change a French multinational company underwent after it internationalized its business within a rather short time period by acquiring two other, Anglo-Saxon multinationals. The traditionally ethnocentric company soon faced the classic global integration – local responsiveness dilemma for which a geocentric approach seemed to be the solution. Drawing on – inter alia – the impacts of its French origin, the author, first, captures the company’s organizational culture prior to the acquisitions and how it informed the former international HR management approach and, second, takes a look at the changes resulting from the acquisitions and how these changes affect the approach to international HR management. The results show that the sudden presence of different cultural values evoked changes in a number of aspects, like the need for staffing subsidiary management positions with locals instead of French, the acceleration of leadership development programs or the emergence of leader profiles others than “French” and “from a Grande Ecole”. However, Muratbekova-Touron does not elaborate what exactly constitutes this new geocentric approach towards international HR management. One would have expected to read about negotiated practices and meanings in this regard. Also, the *process* of this development which the title of the paper potentially indicates is not described.

Rather, a pre- and post-picture of the organizational culture of the company is drawn.

To conclude this chapter, an important last note is to be made. Being aware of ethnocentrism and ethnorelativism and considering oneself as particularly intercultural competent does not mean that one is immune to ethnocentricity. The same applies to the notion of OD. Having its roots in the US, it implicitly mirrors the cultural aspects of its origin: The mere potential to develop organizations and its members itself, the willingness and ability to learn, personal responsibility and self-regulation of actors within the organization – all that is just *one* understanding of OD. Barmeyer (2010) states that whoever engages in intercultural OD first, needs to be aware of the implicit social understanding of organizations and their members and second, needs to make different worldviews and competences a subject of discussion, clarify and appreciate them. If these conditions are met, a contextualized, non-ethnocentric intercultural organizational development is possible. A good example for differing understandings of OD is provided by Amado et al. (1991) who demonstrate in their analysis of a debate between an American consultant and a French sociopsychologist how different implicit models of organizations resulting from different cultural realities inform the French and US approach to OD respectively. One can imagine, that contextualizing intercultural OD gets particularly complex, when the OD intervention involves more than two different understandings, e.g. in a multicultural setting.

### 4.3 Summary

The past chapters have provided an overview of established concepts of and related to intercultural OD. Taking on a constructive approach to culture and interculturality, individual and organizational learning as a main driver for OD plays an important role in describing and understanding the specific OD under study. The intercultural dimension of OD can be understood by considering Perlmutter's (1969) attitudes of HQ managers towards international subsidiaries as development steps, as well as by taking the process of internationalization and accompany-

ing changes in organizational structure, practices and roles into account (Bartlett/Ghoshal 1989). In this thesis intercultural OD is understood in the way Barmeyer/Mayrhofer (2016) have defined it. Thus, it is intended to take a look at how strategies, structures, processes and resources but also attitudes changed over time for the sake of a more effective intercultural behavior within the sub-unit under study. However, while Barmeyer (2010; 2018) understands intercultural OD as targeting the organization as a whole, i.e. the HQ *and* its subsidiaries, by aiming at the “constructive design of interculturality through the transformation and development of people and organizations considering (inter) cultural influences and cultural contexts with regards to attitudes, methods and contents” (Barmeyer 2018, p. 274), in this thesis, intercultural OD, first of all, targets the HQ. That is, in this case, intercultural OD is primarily understood as supporting the observed development of a HQ sub-unit team from ethnocentric to more and more ethnorelativistic attitudes even more, before, secondarily, it is extended to international subsidiaries and thus, is truly made “intercultural” in its genuine sense. This also means that here, OD is not understood as a planned intervention, but rather as an emerging process, triggered by several factors like intercultural learning and my own involvement as an action researcher. It’s about looking at and strengthening the development route the organization went on *from the inside* or, like Schein (2000) puts it, about identifying and going “with the natural flow of these processes” (p. 28), by observing like an ethnographer and intervening like an analyst would do.

In order to conclude this second theoretical chapter, figure 16 provides the final framework which synthesizes the ones elaborated in the run of the literature and theories review above: Within the intercultural OD of an organization or organizational unit, the organization develops from ethnocentric to ethnorelativistic assumptions. This change is triggered by experiences which are made and information that is collected following on actions and which are reflected on in order to result into individual and organizational learning. In the following, structures and routines may be adapted based on this learning in a single loop learning sense and guide further action. Double loop learning then happens once these learnings get embedded in the organization’s theo-

ry-in-use and mental models (Argyris/Schön 1978) for the sake of more efficient and appreciative intercultural behavior (Barmeyer/Mayrhofer 2016). Learning moves from the individual to the organizational level as soon as learnings affect and change organizational action based on adapting practices and routines – supported, for instance, by a promotor as a hinge between individual and organizational level (Bolten 2010) or intercultural experiences by a greater number of individuals (Bartel-Radic 2013). Learning moves from a single loop to a double loop sense as soon as no longer “only” structures and processes, i.e. the visible parts of organizational culture are affected and changed following on the learning processes but also the values and assumptions underlying them, i.e. the organization’s theory-in-use (Argyris/Schön 1987) or basic assumptions (Schein 2016). Within this development, I am as an action researcher the observer of all these events and companion of these processes (Schein 2000) in order to intervene during the most critical phases of the development – critical in the sense of mandatory for the development to proceed: the gathering of information (Dixon 2019), individual and team or group reflection on the experiences made in order to learn from them (French/Bell 1994; Lewin 1946; Senge 1990; Torbert 1972), the embedding of these learnings into the organizational routines and mental modes (Argyris/Schön 1978; Sievers 2000; Susman/ Evered 1978) as well as the actual “application” of the newly developed ethnorelativistic attitude to further action (Dixon 2019).

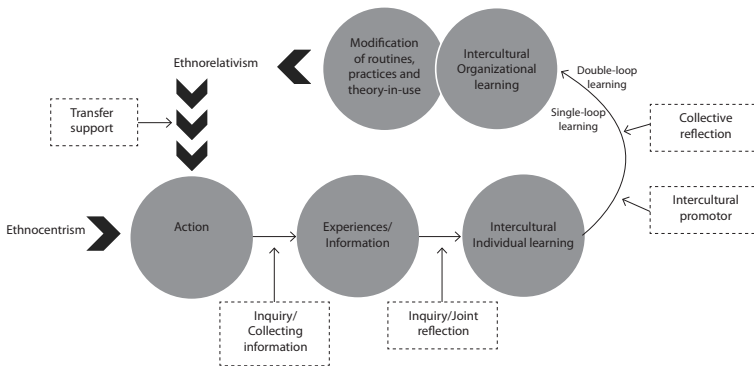


Figure 16 Conceptual framework of the study

This framework is a first summary of all concepts and relations which have become apparent both from reading the relevant literature as well as during my ongoing observations and a first data analysis. It shall now serve as an orientation during the main analysis especially of research phase 2. In addition, the link of this second research phase to the first one which will be established in the following chapter shall be integrated in order to provide a holistic framework for this thesis.





## 5 Linking international practice transfer and intercultural organizational development

How do now the two topics of international practice transfer and intercultural OD relate to each other? Theoretically, of course, there are substantial overlaps. A major common theme is the notion on ethnocentrism and ethnorelativism or ethnocentricity, polycentricity and geocentricity respectively. While Perlmutter's (1969) attitudes serve as development steps of intercultural OD, they of course are highly relevant influencing factors on a meso and micro level when it comes to analyzing the HQ's and individual actors' approach towards the transfer. An ethnorelativist attitude can be both the goal and outcome of an organization's learning and development (Barmeyer 2010; Bartel-Radic 2013) as well as a necessary condition for the recontextualization of practices and their transfer's success (Barmeyer 2012). Barmeyer (2010) illustrates that the mere act of transferring strategies, values, structures and processes internationally is constituting an organization's development. He further shows how difficult it is to design this intercultural development in a way that is value-adding and ethnorelativistic as organizational development is bound by its specific cultural context. Intercultural OD and all its supporting concepts, methods and tools therefore must be contextualized in order to lead to success. Although being rare, horizontal (Barmeyer 2018) and reversed transfer of practices (Edwards 1998) makes one think of the network character of a transnational company where information is shared between units (Bartlett/Ghoshal 1998) and these directions of practice transfer are means of accessing and sharing this information and knowledge between organizational entities (Maimone 2018). Another, paradigmatic commonality is the system's orientation and thinking implied in both the notions of organizational learning (Senge 1990) and organizational development (Trebesh 2000; Gairing 2017) and the dimension of integration as the factor leading to a practice' institutionalization, as the underlying view is that a practice won't be successfully adopted if it doesn't have impact on other practices of the recipient (Björkman/Lervik 2007; Kostova 1999).

Edwards and Ferner (2002) provide another link between the two present topics: Investigating the country-of-origin effect within MNC behavior, they state that this effect might lose weight the longer a company operates internationally as there is “the possibility for MNC’s to learn from other business systems” (p. 97). Thus, by internationalizing and transferring practices, companies are learning from the experiences they gain which is an integral part of organizational development (French/Bell 1994). The link to the notion of learning is also made by Brannen (2004) who states that recontextualization – an important concept to be looked at within the framework of international practice transfer – can have positive impacts on corporate innovation and provide with opportunities for learning. Again, due to the close relation between learning and OD, shifts in meanings within the international transfer of practices could indirectly contribute to an organization’s further intercultural development.

Thus, viewing international practice transfer as means of OD and opportunity for learning combines the two topics in a very natural way. As already stated in the introductory part of this thesis, the primary driver for combining these two topics, however, emerged inductively from the data I collected, i.e. the link was first of all an empirical one that triggered further research into the literature in order to legitimate this link also theoretically. Based on these interconnections, a framework shall be drawn – following on the ones that have been elaborated above – that subsumes both of the topics: The international transfer of a practice – which is analyzed from the three different perspectives presented above in the first part of this literature review – makes an organizational sub-unit team gain experiences which trigger individual and organizational learning in a single- and double-loop learning process which implies a modification of its values, roles, practices etc. The result is a change in attitude from a rather ethnocentric one to ethnorelativism. The dotted boxes anticipate a methodological addition to this conceptual framework, namely my influences as an ethnographer and action researcher as it was already described in the previous chapter. In general, this framework isn’t meant to be fixed and guiding the analysis for whatever it takes – rather it is a first attempt of summarizing and combining the main concepts within the revised literature that I have

found to be a useful grounding for my thesis and the results from my observations and a very first data analysis. Thus, even if it serves as an orientation, it nevertheless is seen as flexible and adaptive to whatever issues emerge during the subsequent parts of the thesis.

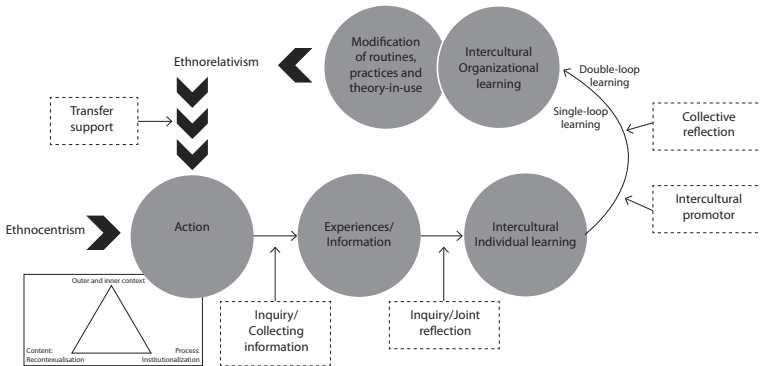


Figure 17 Conceptual framework for the study

In the following, the research design will be displayed which was adopted in order to fill this framework with empirical life.



## 6 Research Design

A clearly cut classification of this thesis' research design is almost impossible. On the one hand, it can be coined as an ethnography as I was an active part of my research context for some years and constantly interacted with the subjects of the study by being one of them (Van Maanen 1988) and the more I got to know about them and the context they and myself were embedded in the more I knew what questions to ask next, what curiosity needed to be satisfied following on my observations (Fayard et al. 2016). On the other hand, my investigations about the international practice transfer, its context, the practice' institutionalization and recontextualization can be termed a classic qualitative, single case study with the particular transfer to Spain constituting the case (Yin 2009). Additionally, the subsequent inquiry into the sub-unit's intercultural development does not look at all like a qualitative case study but rather uses action research approaches like an appreciative inquiry (Cooperrider/Srivastva 1987), learning history (Roth/Bradbury 2008), borrows intervention methods from organizational development practice (Gairing 2017) and also makes use of qualitative data collection methods like interviewing and participant observation. Finally, the single case study I conducted in order to investigate the practice transfer can also be considered as part of the diagnosis phase of an action research design (Susman/Evered 1978), i.e. as a necessary step of inquiry in order to collect information as a basis for learning (Dixon 2019) and further engage in fostering the intercultural OD. However, I didn't really plan for applying an action research approach from the very beginning. It would be dishonest to say now that I had planned with the case study being part of the diagnosis of an action research circle. Rather, the fact that I as a researcher became an even more active and change-seeking part of the system I was conducting research in was triggered by a combination of the case study findings and my personal openness, flexibility and motivation to make a difference with my research.

In other words, the research design of this thesis is as messy, complex and colorful bouquet of methods that are closely connected and inter-related and, taken as a whole, constitute a very honest account of how I

actually approached data collection. Chapter 6 is therefore structured as follows: Chapter 6.1 is concerned with an overview over case study research and ethnography being the two main qualitative methods used. Chapter 6.2 then gives insights into action research as a whole and some specific action research practices in particular that are relevant for my own approach. Reflexivity is discussed in chapter 6.3 separately as it is highly relevant for both qualitative methods and action research approaches. Chapter 6.4 specifies my underlying paradigmatic orientation before chapter 6.5 details the actual way of collecting data in, how I call it, research phase 1 (international practice transfer) and research phase 2 (intercultural organizational development).

## 6.1 Qualitative research methods

The number of researchers who adopt qualitative approaches rises, as they more and more often appear to be the best way to analyze increasingly complex phenomena. E.g. in the *Academy of Management Journal*, in 2017, 20% of submitted papers were qualitative in nature (Bansal et al. 2018). Qualitative research allows for exploring into rather new research areas, prevents cultural biases and ethnocentricity thanks to its emic nature and holistic investigation, allows for adapting the specific research instruments to the context under study and looks behind observable behavior in order to understand the how and why (Marchan-Piekkari/Welch 2004):

“[...] qualitative researchers in contrast to their quantitative colleagues claim forcefully to know relatively little about what a given piece of observed behavior means until they have developed a description of the context in which the behavior takes place and attempted to see that behavior from the position of its originator. That such contextual understanding and empathetic objectives are unlikely to be achieved without direct, firsthand, and more or less intimate knowledge of a research setting is a most practical assumption that underlines and guides most qualitative study.” (Van Maanen 1979, p. 520)

Thus, qualitative research places high emphasis of taking the context of a certain phenomenon into account. Qualitative research is therefore especially well-suited for research in international business being a complex, multifaceted and interdisciplinary area (Birkinshaw et al. 2011; Cohen/Ravishankar 2012; Doz 2011; Marschan-Piekkari/Welch 2004). “Qualitative methods are characterized by a first-handedness in which researchers strive to be at one with their research phenomena in a way that other methods do not require, sanction or even encourage” (Birkinshaw et al. 2011, p. 574) – a characteristic which is particularly relevant for the present study. Although qualitative research allows for many and innovative ways towards the specific research project, it’s nevertheless and even more important to pay attention to certain guidelines concerning rigor and fit. Bansal et al. (2018) provide a set of four principles that help guiding qualitative research endeavors: First, it’s necessary to reflect on and be transparent regarding one’s own epistemology. Second, there needs to be consistency within research questions, data and analysis. In contrast to quantitative research projects, “inductive approaches often require rethinking these questions throughout the project” (p. 1193) which is why one might adapt the way data is gathered or add additional data, advance alternative analysis methods and redefine the research question. Third, an authentic, detailed and clear description of the method employed is important, especially with regard to the researcher’s own role within and impact on the research context which holds particularly important for ethnographic research where the scholar is deeply embedded in the particular context. And fourth, using existing exemplars and templates helps ensuring rigor but forcing oneself to fit into a specific template might be counterproductive as important and valuable contributions from innovative new approaches might get lost (see also Birkinshaw et al. 2011). All these recommendations shall be followed in the following methods and analysis section: First, I will summarize the set of methods that I used and related challenges I was coping with during my research project, before I elaborate my onto-epistemological assumptions during my reflections on the guiding research paradigm. Second, in chapter 6.5.2 I will describe the refinement and adaptation of the original research question and method of gathering and analyzing



data. “[A]uthors sometimes smooth out the bumpy road to discovery and present a more stylized and sanitized version of how the qualitative research process unfolded” (Christianson/Whiteman 2018, p. 399) – this is not what I’m seeking for. I want to draw an honest picture of how the present research project evolved. Third, in the course of the data analysis, especially in chapter 7.2, as well as in the methodological summary chapter 8.2 I will reflect on my own role, impact and potential biases as I’m deeply embedded in my research context. And fourth, as my research approach is far from being linear and precisely elaborated from the beginning due to my deep embeddedness, I will indeed refer to existing theories, models and templates but always be transparent regarding my own, unique way of researching.

### 6.1.1 Case Study

Yin (2009) probably is the most cited author when it comes to case study research. He defines case study as

“an empirical inquiry that investigates a contemporary phenomenon (the ‘case’) in depth and within its real-world context, especially when the boundaries between phenomenon and context may not be clearly evident” (2014, p. 16).

Thus, case studies aim at a holistic understanding and in-depth analysis of a social, real-life phenomenon which so far is not that well understood and highly complex (Ridder 2016). As a result of the inseparability of phenomenon and context, there are a lot “more variables of interest than data points” which is why case study research “relies on multiple sources of evidence, with data needing to converge in a triangulating fashion and [...] benefits from the prior development of theoretical propositions to guide data collection and analysis” (Yin 2014, p. 17). However, while Yin doesn’t question the generalizability of case studies at least when it comes to theoretical propositions, Stake (1995), the second main advocate of case study research, highlights the particularity of each case and that case study research is targeted at embracing con-

text, narratives and the researcher's personal engagement, providing a thick description. In line with this differentiation, Welch et al. (2011) illustrate the positivist orientation of Yin while Stake's understanding of case studies is clearly interpretative in nature. All in all, there are multiple traditions of case study research with different underlying ontologies and epistemologies but yet the unifying element of asking process questions, i.e. questions like "how do things happen" instead of asking for "how much" or "what" (Gehman et al. 2017).

Yin's propositions are frequently shown as being too narrow and not being able to account for the complex reality. For instance, he posits that a researcher needs a plan involving five components for conducting case study research: questions, propositions, unit(s) of analysis, a logic of linking data to propositions and criteria for interpreting the findings. Eisenhardt proposes a similar step-by-step approach in doing case study research (Gehman et al. 2017). Buchanan (2012), however, illustrates by using an own research example that a case might emerge without having planned for it not to speak about even having defined questions. Rather, in his example, he asked himself after the case was documented which questions it might be able to answer. Similarly, the "so what?" of his case study came up during analysis and wasn't dependent on the selection of a somehow extreme or extraordinary case. Buchanan concludes that the authors of the two main texts on case study research, Robert Stake and Robert Yin, don't have an organizational background, but were interested in the evaluation of educational programs and a combination of history and experimental psychology respectively. Thus, although being generic, their accounts might not have thought of opportunities, constraints and expectations related to organizational research. Other authors agree on that "[t]he research process is more a journey with forward and backward steps" (Ridder 2016, p. 58) rather than a strict logic of defining a research question which informs the research design which again leads to data collection and analysis (Ridder 2016).

Yin (2014) nevertheless provides some useful guidelines that can help structuring oneself even when - like it is in my case - one hasn't gone through the proposed steps in designing a case study in the 'right' order. For instance, defining the unit of analysis, i.e. the case, and

bounding it is a central task for a case study researcher. A case can be an individual, events like decisions or organizational change, programs or groups. My case is the international transfer of the practice with a special focus on Spain. Bounding the case then refers to defining where it starts and where it ends. Defining the temporal beginning of the case was rather easy: I became contracted for my thesis, had my first day as a contract ethnographer and soon after that, the transfer to Spain was initiated. The start of the transfer is therefore the beginning of my case. The breath and the end of the case, however, is rather difficult to define, due to the ethnographic nature of my inquiry. As I have been working for the HQ during the whole time of my research, I of course observed a lot of aspects which I wouldn't have considered to be part of my case at first. In other words, my case "gained weight" over time. Similarly, I had troubles to withdraw from collecting data at the very end of my research period because interesting insights just kept on surfacing. Thus, agreeing with Buchanan (2012), I will take the definition and bounding of the case flexible because it is simply required by the complexity and volatility of my research context – or more specifically: I was just able to sense all this complexity and volatility because of my deep embeddedness and didn't withdraw from the context after data collection. Looking at Yin's (2014) types of case study designs, my case study is single in nature, as I am investigating the particular transfer of a practice to one country. However, at some occasions, I will find it necessary to include observations or other data from transfers to other countries, either in order to reinforce the findings from my main case or to exemplify that the practice transfer reality is highly uncertain and non-predictable by including contradictory data. That is, my primary holistic, single case study may extend once in a while to a multiple, embedded case study, by drawing on more than one transfer of the same practice, considering each of them as individual cases (Ridder 2016). In addition, my case study is longitudinal as I am not only studying the phenomenon of international practice transfer at one single point in time (Ridder 2016) but accompanying the whole transfer from its very beginning for more than two years.

## 6.1.2 Ethnography

The study as a whole can be termed ethnographic as my first-hand experiences in the field, being both an observer and a participant, are the core basis for research questions, data collection and analysis. Moore (2011) for instance, impressively describes in her study on discourses of national culture within the framework of an international acquisition how her *holistic* ethnographic approach contributed to understanding the phenomena and answering the research question in a way that wouldn't have been the case if she would have "just" conducted interviews or a quantitative survey. Being an ethnographic researcher *informed* her data gathering and analysis by, for instance, making her interpret data differently in light of her observations or making her ask questions she might not even have thought of asking without her ethnographic approach. The same is also highlighted by Sharpe (2004) who entered the field with a broad set of question which was specified based on her increasing familiarity with the field. In other words:

"Ethnography is improvisational, not procedural. It is path dependent because we learn more about the subjectivity and intentionality of those we encounter in the field after our work has begun, and the longer we are at it, the more we learn about what we need to learn next." (Fayard et al. 2016, p. 46)

Ethnographic research, therefore, is unpredictable, uncertainty being an important feature of an ethnographer's daily life. Serendipities are not unusual which is why a researcher shall embrace flexibility and be open and receptive for new ideas and sudden understandings (Hou/Feng 2019). This also implies that extended participant observation is central for ethnographic research (Sanday 1979/Yanow et al. 2012) and can be considered the main method of data collection (Sharpe 2004) by being part or the first step of a wider research process (Brannan/Oultram 2012). Apart from observations, ethnography relies on multiple sources of data such as interviews and documents, thus entailing data triangulation in order ensure in-depth understanding (De Geer et al. 2004). De Geer et al. (2004) hold the interesting view that data triangu-

lation not only allows to check for irregularities between the different sets of data as it is thought off in its traditional understanding. Rather, for them, potentially emerging contradictions might add even more to understanding complex research phenomena. Two major advantages of conducting ethnographic research are, first, that ‘hidden’, i.e. tacit and taken-for-granted dimensions of organizational life such as power issues and political agendas and interests of actors get visible and second, that it allows to see actors and their agency in relation to their social, historical and institutional context (Yanow et al. 2012). Ethnography is therefore a valuable solution for Pettigrew’s (1987) critics that research in organizations tends to be “ahistorical, aprocessual and acontextual in nature” (p. 655). Ethnography “means living with and living like those who are studied”, “demands the full-time involvement of the researcher over a lengthy period of time” and “consists mostly of ongoing interaction with the human targets of the study” (Van Maanen 1988, p. 2). Brannen (2004) even states that “[t]he only way to understand [...] today’s complex cultural work environments is to actually see and experience the complexity” (p. 285). She further posits, that through ethnographic fieldwork, the “linkages between abstract theoretical concepts such as ‘organisational learning’ or ‘organisational culture’ and the everyday work reality of the individuals enacting them” (p. 285) get visible and understandable. Ethnography is – following its anthropological origins – interpretive, qualitative, holistic, subjective and focusing on words and meanings (Chapman et al. 2004). It thus challenges positivism as it not only aims at gaining a “snapshot view” of an organization but is rather focused on the “flows and interrelationships of behavior and action”, wanting to fully understand organizational life (De Geer et al. 2004, p. 327). This is also why the practice of ethnographic research cannot be taken in a “this-is-how-to” fashion off the shelf. Rather it is all about learning by doing, making own experiences and developing sensitivity (Yanow et al. 2012). All these characteristics of ethnography contribute to what is intended by the present study: As I was working for the multinational company under study for four years, the picture of organizational life, dynamics, actions, interrelationships, processes and individual attitudes I gained during that long period of time was simply too complex and too “full” that I was frequently asking myself where

I should best draw the line, where to “stop” seeing and experiencing things or even which aspects to exclude from my observations because they would just increase complexity even more. In fact, the question where to stop collecting data is a difficult one to answer when one is engaged in research that takes a phenomenon’s context and process into account (Gehman et al. 2017). An ethnographic approach, therefore is best suited to describe what I simply did intuitively and unplanned during my time in the organization. It gives the opportunity to “accept complex reality as it appears in the ‘field’ rather than making an attempt to reduce or simplify it” (Zaidman/Brock 2009, p. 298) which is what I was motivated to do.

## 6.2 Action Research Design

As has already been made explicit in the chapter on OD, action research frequently is an inherent part of OD (French/Bell 1994) and is closely interlinked with its history and development. Coghlan and Brannik (2014) summarize the interrelationships of action research and OD by stating that action research and OD share two key assumptions: The first one is that making people participate in their own learning produces both better learning and more valid data about the actual working of the researched system. The second one is that one is only able to understand a system when one engages in changing it, because “changing human systems often involves variables which cannot be controlled by traditional research methods” (p. 55). In this chapter, some general notes about the nature, process and practices of action research shall be made before I will present my own approach in chapter 6.5.4. Action research

“[...] is a field which developed to satisfy the needs of the socio-political individual who recognized that, in science, he can find the most reliable guide to effective action, and the needs of the scientist who wants his labors to be of maximal as well as of theoretical significance.” (Chein et al. 1948, p. 44)

As it was already mentioned above in the chapter on OD and its historical development, Kurt Lewin is the father of the notion of action research. The above quote from the first accompanying thinkers in the field Chein, Cook and Harding (1948) describes well what dynamics helped him to give birth to a new and more and more recognized field of science. Lewin introduced the term in 1946 in his article called “Action research and minority problems” in which he states when thinking of the best approach to help improve intergroup relations in the US:

“It is a type of action-research, a comparative research on the conditions and effects of various forms of social action, and research leading to social action. Research that produces nothing but books will not suffice.”  
(Lewin 1946, p. 35)

The application of general laws and the mere diagnosis of problems like it is provided by surveys, Lewin (1946) says, is not sufficient when aiming at changing a given situation. Rather, bringing practitioners and scientists together in order to collaboratively handle a given problem is what really brings about change. Change is an essential concern of action research which implies a veritable “social change imperative” (Cox 2012, p. 373). “Action research nearly always starts with a question of the kind ‘how can we improve this situation?’” (Reason/Bradbury 2008, p. 11) and its purpose is “to liberate human body, mind and spirit in the search for a better, freer world” (Reason/Bradbury 2008, p. 5). Chein et al. (1948) state that for an action researcher it’s not sufficient to only describe the world as the researcher’s main concerns “are geared towards action, towards doing something, towards *changing* the world as it is while at the same time contributing to the acquisition and ordering of human knowledge” (p. 43). In his article, Lewin (1946) already describes the cyclic process of action research of diagnosis, planning, acting and the reconnaissance of the results following on the action which leads to system development that is still in use in later and today’s literature (Susman/Evered 1978; Sykes/Treleaven 2009). One exemplar visualization is shown in figure 18. In parallel to Kurt Lewin’s first elaborations on action research, the British Tavistock Institute of Human Relations also worked towards the development of

solutions to major social problems by bridging the research-practice divide (Susman/Evered 1978).

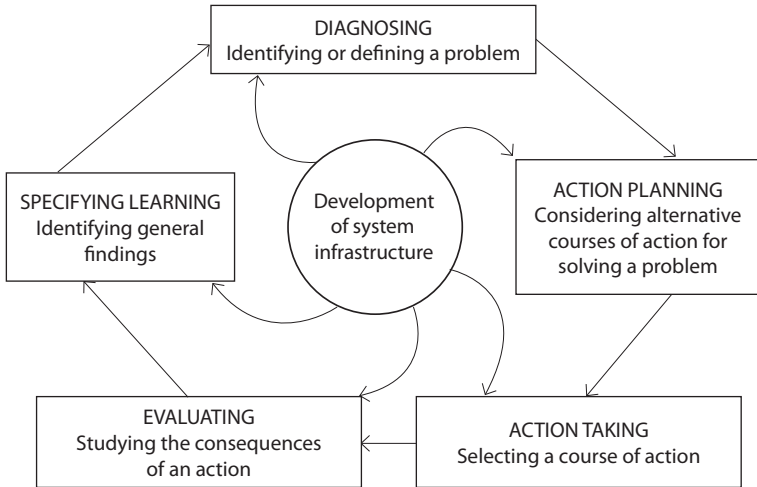


Figure 18 The cyclical process of action research (Susman/Evered 1978, p. 588)

The cyclical process of AR is reflected in the definition proposed by French and Bell (1994): AR is

“the process of systematically collecting research data about an ongoing system relative to some objective, goal, or need of that system; feeding these data back into the system; taking actions by altering selected variables within the system based both on data and on hypothesis; and evaluating the results of actions by collecting more data.” (p. 110)

Another, broader definition is provided by Reason and Bradbury (2008) in their Handbook of Action Research:

“[A]ction research is a participatory process concerned with developing practice knowing in the pursuit of worthwhile human purposes. It seeks to bring together action and reflection, theory and practice, in participa-



tion with others, in the pursuit of practical solutions to issues of pressing concern to people, and more generally the flourishing of individual persons and their communities.” (p. 4).

The manifesto of the journal Action Research lists actionability, reflexivity, significance of impact and partnership and participation as the core characteristics of action research (Bradbury undated, Action Research Manifesto). The later characteristic demarcates action research from qualitative research, as research is done *with* practitioners and not *about* practice. Action Research nevertheless uses qualitative methods for gathering data (Bradbury-Huang 2010).

The Handbook of Action Research (Reason/Bradbury 2008) demonstrates how big and diverse the field of action research has become. Chein et al. (1948) already differentiate between different practices of action research, dependent on the phases of the cycle in which the researcher is getting active. First, the endeavor can be described as *diagnostic action research* when the researcher is engaged in diagnosing a problem situation and giving recommendations based on that. A frequent weakness of this first kind of action research is that action is not always taken after the researcher has expressed his recommendations. The second type of AR, *participant action research*, tries to get rid of that kind of problem: Here, practitioners are involved in the research process from the very beginning – by, for instance, engaging them to carry out a survey – which motivates for taking action towards changing the current problematic situation. Third, *empirical action research* refers to doing something and keeping record of what happens during and after the action. Fourth, the *experimental* type of action research looks at how several techniques of action work and which results they have in order to find out the best way of action, i.e. research is done on action.

Reason and Bradbury (2008) provide a long list of additional and new practices of action research, ranging from action inquiry, action learning, action science, participatory action research to appreciative inquiry. Especially the latter one is recently gaining more and more popularity (Cox 2012) and shall therefore quickly be described. Cooper-riider and Srivastva (1987) were the first to introduce the notion of

appreciative inquiry, answering calls from Gergen (1982) to heighten the generative capacity, i.e.

“[...] the capacity to challenge the guiding assumptions of the culture, to raise fundamental questions regarding contemporary social life, to foster reconsideration of that which is ‘taken for granted’, and thereby to generate fresh alternatives for social action.” (Gergen 1982, p. 109)

At the heart of appreciative inquiry lies the inquiry into the best of what is, into what gives life to the organization under study when it is most alive (Cooperrider/Srivastva 1987). Appreciative inquiry is not about a root-cause analysis of what caused a problem and how to solve it. Instead, as David Cooperrider expressed in an interview: “AI really is an inquiry-based kind of change. Just like we overestimated the role of the negative and dissatisfaction as a factor in change, we’ve underestimated the role of the life-giving and the positive in change” (Grieten et al. 2018, p. 108). The underlying assumption of appreciative inquiry is that every living system like an organization has strengths that can be released and be a source for transformation. The collaborative inquiry into the best of what is can be a very powerful starting point when approaching organization change. This first step of appreciative inquiry is called *discovery*. Being in such a positive state of mind is an ideal condition for entering the second phase of *dreaming*, i.e. envisioning what could be (Ludema/Fry 2008) before entering the *design* phase, i.e. “the designing of ideal future images, where we think and act more like designers, architects [...] and not just like reactive solvers” (Grieten et al. 2018, p. 109). In this phase, it’s about jointly designing the “organization’s social architecture” (Ludema/Fry 2008, p. 283) based on the visions expressed before and committing to invest one’s energy into its creation. The last phase then, *destiny*, centers on collectively taking actions in order to move the organization closer to the envisioned ideal. Thanks to the first phase of discovery, where people have detected their realistic very best, there is confidence that this ideal can be reached (Ludema/Fry 2008). The following visualization shows this widely applied and increasingly popular practice (Grieten et al. 2018) of appreciative inquiry:

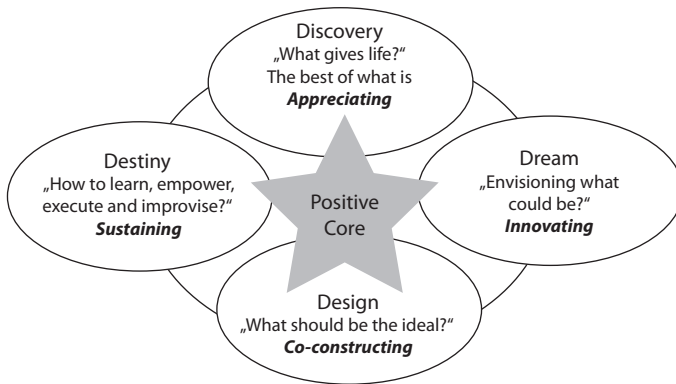


Figure 19 Appreciative inquiry 4-D model (Ludema/Fry 2008, p. 283)

Another practice of action research called *learning history* is of interest for this study, although not entirely in the form described by Roth and Bradbury (2008): The main aim of learning histories is to capture what learnings are made by an organization or team and how these collectives transfer their gained knowledge to other groups within the organization. The action researcher, here, is a central enabler of collective reflection by making use of his inquiry skills and establishing processes in support of this organizational reflection. The authors state that most companies do not have the infrastructure for reflection and – by lacking this infrastructure – are not supporting sustainable learning. Reflection, however, is increasingly seen as being the core of team learning (Bijlsma 2015). In the learning history kind of action research, text is produced about an organization's learning history which can guide reflection and discussion about common experiences (Roth/Bradbury 2008). In this study, I investigate – among others – the learning process made by an organizational unit in the run of their intercultural organizational development and foster this individual and collective learning by providing the space and time for as well as the record of individual and collective reflection on self-initiated happenings and the learnings (or missed learning opportunities) resulting from them.

In order to position action research in relation to conventional research designs and their underlying onto-epistemological assumptions, the following table set up by Susman and Evered (1978) is par-

ticularly helpful. Criticizing positivist research for its lacking ability to solve problems of organizations, in their “Assessment of the Scientific Merits of Action Research” the authors contrast action research against the criteria of positivist science (see table 4).

| <b>Points of comparison</b>                  | <b>Positivist Science</b>  | <b>Action Research</b>  |
|--|--|---|
| <b>Value position</b>                        | Methods are value neutral  | Methods develop social systems and release human potential  |
| <b>Time perspective</b>                      | Observation of the present   | Observation of the present plus interpretation of the present from knowledge of the past, conceptualization of more desirable futures |
| <b>Relationship with units</b>               | Detached spectator, client system members are objects to the study | Client system members are self-reflective subjects with whom to collaborate   |
| <b>Treatment of units studied</b>            | Cases are of interest only as representatives of populations       | Cases can be sufficient sources of knowledge  |
| <b>Language for describing units</b>         | Denotative, observational  | Connotative, metaphorical   |
| <b>Basis for assuming existence of units</b> | Exist independently of human beings                                | Human artefacts for human purpose   |
| <b>Epistemological aims</b>                  | Prediction of events from propositions arranged hierarchically     | Development of guides for taking actions that produce desired outcomes  |
| <b>Strategy for growth of knowledge</b>      | Induction and deduction  | Conjecturing, creating settings for learning and modelling of behavior  |
| <b>Criteria for confirmation</b>             | Logical consistency, prediction and control                        | Evaluating whether actions produce intended consequences  |
| <b>Basis for generalization</b>              | Broad, universal and free of context                               | Narrow, situation, and bound by context   |

Table 4 Comparisons of Positivist Science and Action Research (Susman/Evered 1978, p. 600)

It becomes clear that action research is applying a completely different worldview than the dominant paradigm of positivist research. Similarly, Reason and Bradbury (2008) state that action research is based in a very different paradigm compared to conventional research as its purposes and the way the nature of inquiry is understood are different:

“Action research is a family of practices of living inquiry that aims, in a great variety of ways, to link practice and ideas in the service of human flourishing. It is not so much a methodology as an orientation to inquiry [...] Action research does not start from a desire of changing others ‘out there’ [...] rather it starts from an orientation of change with others.” (p. 1)

Thus, action research clearly has some similarities with the traditions of qualitative research (Herr/Anderson 2015) and arises from the same onto-epistemological stream as ethnography by, for instance, viewing human beings and action in relation to context and time, not wanting to be a distant observer-researcher or aiming at the generation of generalizable knowledge (Bradbury-Huang 2010). A number of qualitative textbooks even list action research as one of numerous qualitative methods (Ridder 2016, Simon/Cassell 2012). It nevertheless represents a wholly different approach to research in that it is centering on the partnership with practitioners (Bradbury-Huang 2010).

This difference to traditional research approaches is also reflected in the construction and writing of the thesis: Coghlan and Brannick (2014) list seven issues an action researcher needs to deal with when writing up an action research dissertation: the purpose and rationale of the research, the organizational and academic context, the methodology and method of inquiry, story and outcomes, self-reflection and learning of the action researcher, reflection on the story in light of experience and theory and the extrapolation to a broader context and articulation of usable knowledge. Speaking of a *story* instead of *data analysis* like in conventional research approaches might be one of the most differentiating topics in this list. In their description of how to write down one’s action research story, Coghlan and Brannick (2014) state that it is useful to first write down the story as a chronological narrative, structuring it along certain time periods or projects. In a second step, then, reflecting on that narrative story leads to emerging themes and senses of meaning which ultimately lead to building a synthesis. Thus, writing down the story is an important part of finding synthesis. The authors warn against mixing the mere, neutral story with the researcher’s interpretations and sense-making: Drawing a clear line between these two parts of the story is essential for demonstrating methodological rigor.

As will be described in the following chapter on reflexivity, this differentiation will be reached, for instance, by including *reflective pauses* into the narrative. These reflective pauses will also be used in order to address learnings I have made as an action researcher whenever things surprised or disappointed me or challenged a-priori assumptions. A condensed summary of these reflections and my learnings is provided in chapter 8.2. Regarding the issue of reflecting on the story in light of theory, it is essential to align the story to theory and extend or develop it. Last but not least, the famous question of “so what?” needs to be answered by an action research dissertation, too, i.e. the research project shall be extrapolated to a broader context (Coghlan/Brannick 2014).

Another important topic that needs to be addressed is the quality of action research. Reason (2006), for instance, details four characteristics of good action research: *Pursuing worthwhile purposes*, i.e. not just solving a practical problem but contributing to the well-being and flourishing of humanity; *democracy and participation*, i.e. the creation of democratic, participative and pluralist communities of inquiry and research with, for and by people and communities; *many ways of knowing*, i.e. intuitive, experiential, presentational, propositional and practical knowing and the *emergent development form*, meaning that good action research “emerges over time in an evolutionary and developmental process” (p. 197), which is why action research “cannot be programmatic and cannot be defined in terms of hard and fast methods” (p. 197). Reason (2006) also adds that the term validity holds are clearly positivist notion and therefore might not be applicable to action research. Similarly, Herr and Anderson (2015) state that the term rigor needs to undergo a redefinition if it wants to be applied to action research. They set up a list of quality criteria which they link with the main goals of action research (see table 5)

| <b>Goals of action research</b>                   | <b>Quality/Validity Criteria</b> |
|---|----------------------------------|
| The generation of new knowledge                   | Dialogic and process validity    |
| The achievement of action-oriented outcomes       | Outcome validity                 |
| The education of both researcher and participants | Catalytic validity               |
| Results that are relevant to the local setting    | Democratic validity              |
| A sound and appropriate research methodology      | Process validity                 |

Table 5 Goals of Action Research and Validity Criteria (Herr/Anderson 2015, p. 67)

While keeping all these criteria in mind, I will specifically follow Reason's (2006) description of good action research:

“Quality in action research will rest internally on our ability to see the choices we are making and understand their consequences; and externally on whether we articulate our standpoint and the choices we have made transparently to a wider public.” (p. 190)

### 6.3 Reflexivity

Reflexivity is an important part of both qualitative and ethnographic research and action research (Bradbury-Huang 2010; Coghlan/Branick 2014; Sharpe 2004; Yanow et al. 2012) and shall therefore play an important role in this thesis as well. Reflexivity is

“an awareness of the researcher's role in the practice of research and the way this is influenced by the object of research, enabling the researcher to acknowledge the way in which he or she affects both the research process and the outcomes.” (Haynes 2012, p. 72).

The Action Research Manifesto describes reflexivity as “acknowledging the self as an instrument of change among change agents and our partner stakeholders” (Bradbury, undated, Action Research Manifesto), i.e. it is essential for an action researcher to be reflexive about first, the unfolding change and second, the researchers' presence' or intervention's impact (Bradbury-Huang 2010). Pierre Bourdieu who continuously emphasized the necessity of a reflexive turn within social sciences expresses in an interview:

“[O]ne of the chief sources of error in the social sciences resides in an uncontrolled relation to the object which results in the projection of this relation onto the object. [...] people whose profession it is to objectivize the social world prove so rarely able to objectivize themselves, and fail

so often to realize that what their apparently scientific discourse talks about is not the object but their relation to the object.” (Bourdieu/Wacquant 1992, p. 68f)

Bourdieu posits that reflexivity is not born from a researcher’s narcissism but that it’s the “necessary prerequisite of any rigorous sociological practice” (Bourdieu/Wacquant 1992, p. 68). Similarly, Hou and Feng (2019), referring to ethnographic PhD research, state that the “failure to give a reflexive and critical account of all contextual factors and actions taken in a seemingly ‘messy’ process would indeed affect credibility and trustworthiness of the qualitative study” (p. 1). Reflexivity can take place regarding a number of topics. For example, one could reflect on his or her own methodological approach, asking oneself whether it still is the right choice or a revision would be necessary. The same applies to ontological or theoretical reflexivity. Also, researcher’s emotions might play an important role within the research process and might have the power to enhance it. Additionally, the cultural, social or political attitudes of the researched could influence the way the researcher makes sense of the data. A reflexive researcher takes this possibility into account and critically reflects on whether it might be the case. Ultimately, one could engage in subjective reflexivity, which is the case when the researcher is not only subject but also object of the research (Haynes 2012). Yanow et al. (2012) differentiate between reflexivity on the researchers positionality in its geographic and demographic sense, especially in case of interpretive ethnographic research. That is, an interpretive ethnographer is required to reflect on one’s position within the organization in relation to hierarchies, power and knowledge as well as one’s demographic positionality, i.e. a researcher’s characteristics which might affect one’s access to certain persons, situations or people’s experiences. I will be reflexive regarding all these themes, asking myself how I am connected to my research and how this connectedness – whatever it may look like in each particular case – impacts the research process and its outcomes. I will do that by adapting an approach of some of the authors of articles published in the *Academy of Management Discoveries* (see e.g. Li 2019; Leonardi/Bailey 2017 or Uzunca et al. 2018): They include audio files with their author’s voice into their papers, answering ques-



tions like “What motivated you to conduct this research?” or “How did you design the study?” in order to provide the reader with information from “behind the scene”. I will adopt a similar approach – Coghlan and Brannick (2014) call that a reflective pause (p. 170) – when it comes to the parts of the data analysis where I will be reflective on my impact as a researcher as well as my sense-making of the data and processes:

This is how I will mark the parts where I am reflective on my positionality, emotions, attitudes and characteristics which influence my interpretations and sense-making, the decisions I take and my own impact on the research setting.

## 6.4 Research paradigm

The onto-epistemological groundings of this thesis shall now be displayed. Burrell and Morgan (1979) define four sociological paradigms as „very basic meta-theoretical assumptions which underwrite the frame of reference, mode of theorizing and *modus operandi* of the social theorist who operate within them” (p. 23). They represent an „agreed way of seeing the world“ (Romani 2008, S. 50) within a certain research community and differentiate themselves by their different assumptions about “the nature of organizational phenomena (ontology), the nature of knowledge about those phenomena (epistemology) and that nature of ways of studying these phenomena (methodology)” (Gioia 1990, p. 585). The paradigms are structured along two dimensions: An objective-subjective dimension of analysis describing the researcher’s ontological assumption about „whether ‘reality’ is a given ‘out there’ in the world, or the product of one’s mind“ (Burrell/Morgan 1979, p. 1) and a regulation-radical change dimension stating how the researcher approaches the nature of society respectively his epistemological assumptions, i.e. either focusing on and trying to understand its stability and status-quo or questioning the status-quo, searching for alternatives and seeking for “man’s emancipation from the structures which limit and stunt his potential for development” (Burrell/Morgan 1979, p. 17). The resulting

paradigms – the positivist, interpretive, postmodern and critical one – can be visualized as follows:

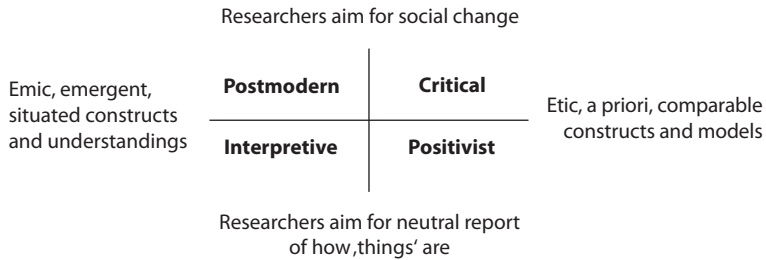


Figure 20 The four research paradigms (Romani et al. 2014, p. 16)

This study takes on an interpretive paradigm. It is emic, i.e. it takes on the view from within, an approach that tries to understand and describe a culture or organization from an insider's point of view (Morris et al. 1999). An emic approach, in cross-cultural studies for example, thus, doesn't refer to universal constructs but rather searches for cultural particularities which are unique to a specific culture (Romani et al. 2014). The emic perspective is seen to support the present research endeavor best, as it allows for understanding complex and multifaceted phenomena holistically, like it is intended by an ethnographic research design. Describing the present organizational reality objectively would indeed have been possible but important findings that contribute to a holistic understanding would have been missed. Additionally, it is argued that the knowledge generated from a positivist stance is not usable for solving actual problems of organizations (Susman/Evered 1978). For both the ethnographic and action research oriented parts of data collection within this study, an emic perspective, therefore, is the best and even only way to go (Susman/Evered 1978; Van Maanen 1988). My approach is clearly interpretive, because my main focus laid on "people embedded in their socio-cultural reality: their experience, their ways of thinking, their sensemaking and how they talk about it – that is, their life-world" (Romani et al. 2011, p. 4). I wasn't aiming at testing a theory or model but rather at deeply understanding the dynamic interactions and sense-giving processes of people within their specific context by being in dialogue with these people (Romani et al. 2011) and – thanks to my

ethnographic approach – even being one of them (Van Maanen 1988). The knowledge produced within an interpretive paradigm is situated and derived from the researcher’s “personal reading and understanding of the data in specific space and time” (Hou/Feng 2019, p. 2). That is, by viewing oneself as part of the research context, the researcher isn’t taking an objective stance but presents the own reading of the data as one possible way of reading and making sense of it (Welch et al. 2011).

In general and in order to sum up the underlying assumptions and the research design of this thesis, my work is ethnographic and emic in nature, employs a multitude of theoretical concepts and perspectives and is thus viewing itself in line with Brannen and Doz’ (2010) call for a change in viewing at IB phenonema “from a distance to up close and personal” (p. 245).

## 6.5 From an ethnographic case study to an action research design

### 6.5.1 Research Context

This research is conducted in the automotive industry, more specifically, in a German premium car manufacturer and its global subsidiary and retail network. The HQ of the manufacturer is located in southern Germany and has a history of more than 100 years. With more than 40.000 people employed at the German HQ, another 50.000 employees in production and retail subsidiaries worldwide (internal document, HR figures, February 2020) and more than 150.000 people employed in the global retail network of 2900 dealerships in over 100 countries (internal document, Business Model, September 2019) the organization under study can be considered a true global player. Due to historical and growth reasons, the global subsidiary and retail structure of the corporation is complicated and difficult to understand. In order to decrease complexity, the organizational structure can be generalized as follows: The German HQ maintains a direct relationship to its national importers or national sales companies (NSC) which in turn

are responsible for their respective national dealership network as it is visualized in figure 21.

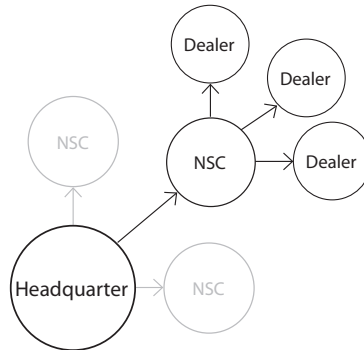


Figure 21 Retail structure of the company (own visualization)

The subsidiary and dealer landscape itself is very diverse and heterogeneous: There are big subsidiaries with hundreds or even thousands of employees, but also other ones consisting of less than 5 persons. The same applies to the respective dealer networks: The number of dealers per country ranges from 1 to over 500. This is resulting into a big range in terms of sales volume: China as the manufacturer's biggest and most important sales market accounts for more than 50% of the company's total sales volume. China, the US, Germany, UK, France, Spain and Italy accounts for more than 80% of the total worldwide sales volume of approximately 1,9 million cars (internal document, Business Model, September 2019). One can imagine that the HQ's attention in this case isn't distributed equally among its subsidiaries and that the amount of resources and the level of autonomy granted varied a lot (Bartlett/Ghoshal 1998).

I was present at the HQ during my whole research period thanks to my dissertation being part of a cooperation project between my university and the car manufacturer. Thus, my work is what Fayard et al. (2016) call a *contract ethnography*, i.e. a company paying for being researched ethnographically. Fayard et al. (2016) contrast the contract form of ethnography against the traditional ethnography, the main differences being due to having a company behind which is sponsoring the

research project. This results into the research scope and goals primarily being shaped by company needs and the responsibility of the researcher to first serve practical and in a second order scholarly interests. In my case, I cannot draw such a sharp line between these two forms of ethnography. Having started to work for the company as an intern and later benefited from the opportunity to write my master thesis within the same department, I already had established good relationships with the department's management and team which helped extending my scientific involvement. Thus, per definition, it is a contract ethnography because the company paid for my research project, but in terms of its scope and aim it even was within my responsibility to propose a specific topic. Furthermore, there is no hierarchy between practical and scholarly outputs, but rather a balance of advancing the empirical and theoretical understanding of the intercultural organizational dynamics and simultaneously feeding my findings back to the department in appropriate ways. This is also the reason why my research does not follow a linear, planned process like it is described in the majority of qualitative methods books and guidelines. Rather, I find myself well at home in what Pratt (2016) describes as the circular process of selecting research questions and context: Instead of sticking to the traditional way of first identifying a problem, defining a research question and reading existing literature, before choosing a method and ultimately a context for one's research, Pratt posits that – as long as in the end everything is covered – it doesn't matter whether to start with a context, a problem or a research question. In my case, the context was already there. I didn't have to or was able to choose which context could be an interesting one. Then, the ethnographic approach came naturally, I didn't consciously choose it. Being deeply embedded in the context made it an automatism that allowed me to detect current problems or interesting dynamics worth to be researched. The discovery of a problem in my empirical context led to the first research phase that will be detailed in the next chapter; the observation of the changing attitude of individuals within the organizational sub-unit following on what happened in the first phase led to asking a wholly new question, reading different literature and applying a different design and different methods of data collection and active interventions from my part. Thus, my action research design emerged

rather than it represented a conscious decision at the beginning – just like Reason and Bradbury (2008) describe it in the introduction to their *Handbook of Action Research*. Pratt (2016) sums up that these circular or iterative kinds of research processes might not be that uncommon as it most often seems to be, saying that “even though the selection of research questions and contexts in a published piece looks pretty polished, the process itself was likely pretty messy and possibly even absurd at times” and that “sometimes we start on the street corner and move our way in” (p. 185).

In total, I spent four years in this specific sub-unit which deals with international HR development. The primary task of the department is to develop trainings and HR development practices for the brand's retail staff all over the world. The trainings involve topics ranging from product and brand, leadership, communication and selling skills, self and time management to customer centricity. The target group is both the management and employee level of dealerships worldwide. Traditionally, the trainings are centrally developed and implemented locally. Normally, it's the department itself which decides upon which topic to tackle in a training program, mostly based on trends and latest developments in topics like leadership, for instance. There also might be requests from other HQ sub-units to, for example, develop a training in order to make sales staff at the dealership familiar with the newest technical feature or sales strategy.

The sub-unit's main contact persons from international markets are the subsidiary's training managers. The training managers are the country responsible for all training-related topics. Typically, the training manager has contracted a network of external trainers who execute trainings for dealership staff. Depending on the size of the dealer network and the subsidiary itself, there might be more than one training manager; in other cases, the training manager also functions as a trainer and takes care for additional tasks apart from training.

Traditionally, once the HQ sub-unit has finalized a training program, it shares it documents-wise with the training managers via an online training portal and/or conducts a so-called train-the-trainer where the training managers and trainers from interested subsidiaries are guided through the materials or experience the training as a participant them-

selves. Additionally, more or less every two years, a training conference takes place, where the centrally developed training material is “handed over” to international subsidiaries. In some cases, a pilot might be executed in order to test the training concept before transferring it to the broader international network. An important note here is that for subsidiaries and their respective retail network it is not mandatory to adopt and implement the trainings developed by the HQ’s sub-unit. That is, it’s the subsidiary’s decision whether or not to take on the HQ’s training proposal. An exception is the certification of dealer sales advisors, a formal “test” new sales advisors need to pass in order to be allowed to work as a sales advisor of the brand. The implementation of this centrally developed certification is mandatory and adaptations need to be agreed with the HQ training subunit.

How the normal process of training development and implementation for all trainings looks like, is visualized in the following figure.

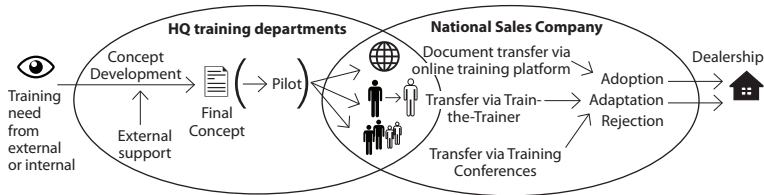


Figure 22 Normal process of concept development and transfer (own visualization)

In general, the automotive industry is undergoing rapid and disruptive changes. Competition is fierce, especially as the vehicles from different premium manufacturers don’t necessarily differentiate themselves in terms of design, functionalities and price. In parallel, diesel gate not just put some manufacturers (Sarkar/Osiyevskyy 2018) but the industry as a whole under pressure when it comes to developing alternative engine solutions. Electronic vehicles are getting more and more polished and are gaining popularity across the globe. Digitalization has reached the vehicles themselves as well, making them “computer(s) on wheels” (Roland Berger, 2020) which requires wholly new competences both on manufacturer and dealer level. Automated driving is another major change that is about to come in the near future and which will

revolutionize mobility patterns entirely (Deloitte 2016; Deloitte 2020; EY 2014; PwC 2017). The emerging share economy as well as new competitors who don't necessarily provide the product but rather the mere service of mobility like Uber threaten the sales numbers and popularity of traditional manufacturers. These changes of the so-called fourth industrial revolution are disruptive and thus extremely dangerous for long established companies which frequently cannot keep up with the innovative strength of new companies without decades of manufacturing history (Gairing 2017). Double-loop learning (Agyris/Schön 1978) is mandatory for these organizations in order to not just work on visible symptoms in the sense of a single-loop learning – like developing and manufacturing autonomously driving and electric vehicles – but rather develop new key basic assumptions in the sense of a double-loop learning which impact a change in corporate strategy (Gairing 2017).

In the case of the premium brand I conducted research in, sales volume still rose during my research period with a slight slowdown in 2018 (internal document, Facts and Strategy, October 2019) but the profitability of dealerships went down and was expected to decrease even more in the future, due to the disruptive forces mentioned above (internal document, Business Model, September 2019). Thus, dealers, national sales companies and the HQ itself found themselves in a highly uncertain and ambiguous industry environment, having to deal with a number of external pressures. During the time I was researching within the company, parts of these pressures were addressed by introducing two new brand strategies, a first one which introduced a major shift of focus of the brand's activities from the product itself to the customer (internal document, Brand Strategy, 2017) and, two years after that, another one which consolidated this shift even more (internal document, Brand Strategy, 2019).

These overall industry changes and developments also affect the international training department, especially when it comes to the operationalization of the new brand strategy's intent to increase customer centricity. Just when my doctorate started, a broader program for dealerships was getting finalized of which the central goal was to increase the customers' experience in the dealerships. The program isn't just a training program but rather a dealer development program which



not just targets the cognitive abilities of the dealership staff, but also influences the roles and responsibilities, ways of interaction between the different roles and the process of selling and approaching the customer. The program thus can be considered as aiming for a systemic change, involving both the people's further development and change and also parts of the organizational system around them (Trebesch 2000). I formed part of the sub-unit's team which was in charge of spreading this practice internationally. More specifically, I took over the responsibility of transferring it to Spain. The transfer of the practice to this market therefore became my first main research focus. I was interested into the factors that impact the transfer, the process of the practice's institutionalization and how it was recontextualized in its new context. In the following, I will describe the detailed context of this first phase of research.

## 6.5.2 Phase 1: Context and Case Description

By placing the focus on customer experience, the practice under study represents a direct operationalization of the strategic brand mission of the company and can therefore be considered a strategic organizational practice (Kostova 1999). The practice is called *Achieving Retail Experience* (ARE). The overall goal of the practice is to increase the customer's experience at the dealerships in order to keep them attractive for customers and increasing their profitability. The practice further can be described as an initiative for change encompassing several areas at the recipient unit – changes that are seen as such at least from the German HQ sub-unit's perspective: First, the practice aims at introducing a new personnel model including new roles and responsibilities. This new model is meant to increase efficiency and reduce complexity for the sales advisor who formerly had to encompass various tasks and competencies by adding three additional roles. Second, as there are more persons interacting with one and the same customer in this new model, the practice includes fostering teamwork between the staff members at the dealership. Third, the practice introduces a new sales process which places more emphasis on the experience of the customer instead

of the product itself. Thus, the practice under study isn't a traditional example of practices that are normally transferred such as a two or three days training program, but rather represents a broader change and development program for the brand's dealerships in order to keep them competitive in uncertain and fast changing times. Here, the training program being the traditional form of practice that is transferred by the sub-unit represents the means of transfer for the practice of ARE.

The practice itself was conceptualized in cooperation with an US-based agency. Later, the training concept which was meant to translate this first conceptualization of the practice into reality was developed together with a Swiss-based training and change management agency. Traditionally, the sub-unit maintained long-term relationships with German training agencies which supported the development of training concepts. This Swiss agency shall play an important role in the organizational learning process of the sub-unit which I will analyze in research phase 2, as it introduced a number of new, agile and co-creative methods, thoughts and concepts. For instance, one example for a new role the agency proposed to include within the transfer is the so-called Country Coach. This person was meant to be local on the one hand and forming a close connection with the central sub-unit, thus, was acting as a kind of boundary spanner (Barner-Rasmussen et al. 2014). Having such a person as a representative on-site was new and never dealt with before. The agency additionally proposed to do a "fast prototype" of the practice before designing and finalizing a supporting training concept. The HQ sub-unit therefore decided to proceed in two phases: First, it intended to do a fast prototype for gaining first insights and, based on these insights, design a training concept which then shall be piloted additionally. A major difference from the usual way of transferring practices was, first, this fast prototype beforehand and second, that it was prototyped and later piloted in *several* cultural (Germany, Netherlands, France, Spain, USA and Japan) and dealership contexts (two or three dealerships per country) instead of just one like it normally was the case in the past. An overview over the process from the development of the ARE practice until its global rollout is shown in figure 23.



Figure 23 Process from ARE practice development to global rollout

For each prototype, pilot or rollout subsidiary, one or two responsible persons from the HQ were appointed as a support and contact person. These so-called “market advisors” were selected based on individual characteristics, preferences and experiences. A French colleague, for instance, took over the responsibility for France and Belgium. E3 was taking Italian language courses, used to spend some weeks each year in Venice and therefore supported Italy. E1 and M1 had a certain affinity for the US and therefore took over the transfer responsibility for the US. The pilots were supported financially by the HQ to an extent that almost all costs were covered and the subsidiaries only contributed a small portion of implementation costs. After the pilots, the practice was intended to be transferred to a larger community of dealerships in all kinds of countries for which the HQ accounted for two thirds of the occurring costs. The transfer itself – like it was the case for all other practices as well except for the certification – was voluntary until April 2020. From that point in time on, selected parts of the practice were set as a mandatory standard for dealerships.

My doctorate officially started during the training concept development, right before the pilots in Spain and the Netherlands were initiated. However, I was already able to observe the prototypes in Germany, France, the USA and Japan before as I already have been present in the department writing my master thesis. That is, I was also able to observe the first results and feedbacks from these first prototypes. Without wanting to go into details, it became apparent that the transfer turned out very differently in these four countries and can be, simply put, divided into successful and non-successful transfers. From this first observation, the first question naturally arose and constituted the main focus of my first research phase: Why is that? What are important effects that are working? How can the practice be sustained and

become the new normal at the recipient units? How do the recipients make sense of it, if any? And how can the HQ behave in order to facilitate more successful transfers?

As soon as these questions were started to be asked by both myself and the department colleagues, I took over the responsibility from HQ side for the transfer of the practice to Spain. The transfer to Spain was not yet initiated at the time when my research period at the HQ started. This allowed me to experience and accompany the transfer first-hand from the very beginning on in order to find out answers to these questions.

Apart from this rational and pragmatic reason for taking over the responsibility for the transfer to Spain, from all the countries where a pilot transfer was initiated, Spain was my favorite country to get in closer contact with. After enjoying Spanish language courses at university, making the formative experience of walking the pilgrim's way of St. James through the north of Spain and spending a couple of months in Barcelona for an internship, I fell in love with the country, its people, language, food and culture in general. The experiences I made during my visits to and stays in the country, my fluent language skills and my emotional attachment to the Spanish culture provided me with a good preparation for my responsibility within the transfer project, facilitated gaining relational access to my Spanish counterparts and the recipient units, additionally increased my intrinsic motivation to make it work and made me wanting to share my enthusiasm for the "Spanish way" with fellow colleagues.

Nevertheless, in my data analysis, I will include observations and data from interviews I conducted alongside my main research focus on Spain that pertain to transfers to other countries, especially the Netherlands which was the country I was most involved with apart from Spain. My high involvement in this practice transfer and the HQ's activities in general provided me with great access to the field, the opportunity to witness all actions and processes related to the practice transfer as well as general dynamics and events, especially at the HQ's sub-unit.

It is important to note, that this research is situated in a context which is characterized by a higher structural complexity than the theoretical considerations on international practice transfer entail. While Kostova (1999) and the majority of researchers in this topic describe the transfer of organizational practices from the HQ to its subsidiaries, the practice being adopted by both HQ and subsidiaries, the structural characteristics of the organization under study here are more complicated as the final recipient of the practice is not the subsidiary, but the dealership. Thus, the practice “travels” across three organizational layers instead of two like it normally is the case (see figure 21). Additionally, the practice is not adopted by the HQ itself but only invented and developed centrally for the use at dealership level.

As already mentioned, the conceptual idea of the practice was transformed into a training program in order to facilitate its transfer and implementation on dealership level. The training program was developed centrally and then handed over to local coaches via a train-the-coach. In the case of Spain, the practice was first implemented in three dealerships located in Zaragoza, Madrid and Bilbao. After these first pilots were finished and evaluated, the practice was transferred to almost all dealerships in the Spanish network. The data analyzed in section 7.1 will mainly relate to the pilot phase, involving the three first dealerships, although observations and informal conversations from the later, broader transfer will also be included. I was frequently present in Spain: First, in September 2017, I took part in a kick-off of the transfer project at the Spanish subsidiary. At this kick-off, the Spanish country coach, the subsidiary transfer responsible and myself jointly presented the ideas of the practice and some first results and stories from other pilot countries and invited the pilot dealer managers to share their concerns and thoughts about it. After that, I took part as an observer in almost all training sessions the dealerships went through from February till April in 2018. Attending these training sessions helped foster a good and trustworthy relationship with the coaches, the dealer management and the dealer team members and provided a good basis for in-depth interviews during and after the project phase. In July 2018, I spent two weeks in Madrid, Bilbao and Zaragoza to conduct semi-structured interviews in person with all employees and managers

who were involved in the practice transfer. In November 2018, I spent another week for an official “project ending” at the subsidiary and two of the dealerships, I visited the third one then in January 2019. Apart from that, I conducted phone interviews with the country coach, the two Spanish coaches and the Spanish transfer responsible in September and December 2018. In December 2018, I interviewed all HQ sub-unit employees and one manager who were involved in the practice pilot transfers to the various countries. In February 2019, I presented the results of my first data analysis to the Spanish transfer responsible during her visit to the HQ in Germany. Her feedback and comments are also taken into account in the data analysis part. In addition to formal interviews, observations and my practical work within the transfer to Spain, I will also draw on emails, informal conversations with all kinds of involved stakeholders and social media data.

The following table lists interview partners and other data which will be analyzed in 6.1. A separate list of the documents used as well as a more detailed overview over interview partners combined for both research phases can be found in the annex.

|   | <b>Type of data</b>                          | <b>Provider/Location</b>   | <b>Time</b>  |
|---|--|--|--|
| 1 | <b>Semi-structured Interviews</b>            | HQ sub-unit: 1 Manager, 3 employees and 2 external consultants<br><br>NSC: 1 Project lead, 3 coaches<br><br>Dealerships: 4 Managers, 17 employees across 3 different locations | November / December 2018<br><br>September / December 2018<br><br>July 2018           |
| 2 | <b>Participant observation</b>               | HQ sub-unit  | ongoing  |
| 3 | <b>(Non-) Participant observation</b>        | NSC and dealerships  | Several days in February, March, April, May and October 2018; January and March 2019 |
| 4 | <b>Informal interviews, emails, meetings</b> | HQ sub-unit, NSC and dealerships   | ongoing  |
| 5 | <b>Validation presentation</b>               | NSC project lead   | February 2019  |
| 6 | <b>Document analysis</b>                     | HQ sub-unit, NSC   | ongoing  |

Table 6 Overview of data types and sources of research phase 1

The interpretative analysis of all the data included the coding of the interviews using MAXQDA. With of course having the literature I read until that point in time in mind, I nevertheless started coding with almost no codes defined beforehand. I merely started with defining the three main codes *context* including its sub-codes macro, meso and micro context, *institutionalization* including its sub-codes implementation, internalization and integration and finally *recontextualization*. Having these broader codes set up, I was able to categorize the data along them without defining additional overarching codes. I hadn't finalized reading the literature before coding and analyzing the data. Rather, the analysis was a back and forth between data and literature, whenever I read an additional paper or I found new information in the interviews. This iterative analysis helped both to rely on the information available within the data, letting themes emerge as opposed to searching for more pre-defined categories but also allowed to link the emerging findings to the literature. Of course, at any point in time, my participant observant and ethnographic work added to what I found in the data, mostly confirming the findings from the interviews.

For structuring the analysis of all this data, I will draw on an existing framework, originally developed for studying organizational change (Pettigrew 1987). It was already presented in chapter 2.4 as a summary and conceptual framework resulting from the current literature on international practice transfer. Also, the reasons why it is useful to consider using this framework although it originates from another discipline were displayed.

To sum up, this first research phase can be described as an ethnographic single case study involving a multitude of qualitative data, where the case is the particular transfer of the practice to Spain.

### 6.5.3 Transition: Shift in focus and design

Apart from processes, organizational structures, strategies etc. working for the HQ during my research also allowed me to get to know "how things are normally done", i.e. the typical patterns or practices of daily work at the HQ. Insights gained through this kind of partici-

pant observation form the very basis of the way and which data was collected. For example, the focus of the first research phase emerged from what I encountered in the research environment: The first round of fast prototype transfers yielded very different results which is why I engaged in researching effects that work within the transfer. Soon, I also started asking what is needed for the new practice to become “the new normal” as the program’s sustainability – or institutionalization – was frequently a topic under discussion among colleagues and managers. Apart from my daily work related to the practice transfer to Spain, I also took part in all kinds of meetings at the department-, division- and company-level as well as in international training conferences. In total, I was able to take part in three conferences with a great variety of international subsidiaries at different locations in 2017 and 2019. These conferences were seen as the main way to get in contact with international subsidiaries, at least regarding the topic of training and HR development. Their main goal was to inform international subsidiaries about the newest developments in terms of training and other HRM practices from the part of the HQ sub-unit and were meant to motivate for an initiation to transfer practices like ARE from the HQ sub-unit to the subsidiaries or dealers respectively. While I was already having great access to the field of research during the daily work as I was literally *in* and *part of* it, during these kind of conferences I additionally had great access to a whole range of subsidiaries apart from my daily interactions with Spain. Thus, there was an ample field of research I could benefit from, much more than I was doing so far in research phase 1. This was – so to say – a framework condition which nurtured my reasoning of and facilitated the change in focus and design. However, the main reason was that I recognized a major change in the attitude of the team which was responsible for the transfer of ARE. More and more, expressions like *co-creation* and *flexibility* became part of the team’s vocabulary, statements like “Let’s see first what the subsidiary is already doing in this regard. We do not need to reinvent the wheel!” or “Wow, look at that example from country X, that’s a great idea!” became more and more apparent and somehow indicated that there was something going on, a development, a change, an emerging tendency. To give a very tangible, small example: One element of the new sales process which was part



of the ARE practice, was a little, so-called unsolicited gift. This gift was meant to release the tension during the step of the sales process where the sales advisor and the customer discuss different offers and prices. At the beginning of the first prototypes of the practice, the HQ sub-unit ordered numerous pralines from all kinds of chocolatiers from Swiss and Germany – having the idea in mind to define a central unsolicited gift that symbolizes the car brand's values and send them to dealers so that they can give them to their customers. Soon, the team recognized that it makes no sense to proceed like that but that it's better to leave the decision about the exact nature of the unsolicited gift and its procurement to the subsidiaries or dealers. Cultural reasons were not yet involved here – the decision was primarily due to the fact that chocolate pralines are just not that easily shipped. That is, this first example of a change in transfer strategy from centralization to localization was a pretty rational, “forced” one. Here, one could refer to single-loop learning that led to an adaptation of organizational action but not yet to a change in the cultural mindset of the sub-unit (Argyris/Schön 1978; Bartel-Radic 2013). As the transfer evolved and more and more feedback was gathered from the first prototype dealers, it became more and more apparent in all kinds of regards that a one-size-fits-all approach to the transfer is not possible. The practice encountered completely different realities in Germany, France, the US and Japan and thus, it was more and more realized that a certain amount of flexibility is necessary and even mandatory when it is to work out and get institutionalized in the dealerships. Apart from this perceived and rather “forced” need to step back and allow for local adaptations, the examples of these local adaptations that were fed back by subsidiaries were well received and very often found to be creative, good and beneficial for the whole ARE community. The turn of this development from leaving more freedom for rational reasons to appreciating and wanting the resulting local solutions to happen even more triggered my curiosity of wanting to find out more about it.

This changing attitude already emerged from the data in research phase 1 but I treated it “only” as a description, as a fact and context factor on an organizational level that had a positive impact on the transfer. Having taken notice of this development, however, I started to support

it even more. Without really planning for it, I suddenly entered another stage of my research where it was no longer “enough” to merely describe *what is* in a selected case. This next stage was all about investigating this development of the sub-unit team. Thus, it was descriptive again on the one hand, so to say as part of the diagnosing stage of an action research circle (Susman/Evered 1978), but on the other hand, it was also about fostering it even more through several interventions I will describe below. I even extended these interventions to other sub-unit members and ultimately to subsidiaries, aiming at further “spreading” the newly emerged mindset.

Apart from the data and observations I made during the transfer, there were two additional events which triggered the transition in research focus. The first one was a presentation I held in the doctoral colloquium of my supervisor at the University of Passau. I attended that colloquium regularly and sometimes professors from other universities were present as guests as well. At that time, Volker Stein from the University of Siegen was there and very active and harsh in providing his feedback to my presentation about the results of my first research phase. He said, for instance: “Where is the innovation? Where is the specialty? It’s just another boring study on practice transfer.” His feedback affected me deeply and I realized that he was right and that I myself was wondering where my real contribution would be. When I am reflecting now on this situation, I would say that this was the moment in time – in April 2019, i.e. after already two years of research for my thesis – when I actively started to rethink what I have been doing so far. The second event was a book I read shortly after this far-reaching presentation: *Reinventing organizations* by Frederic Laloux (2014). In this book, Laloux is providing his vision of a new form of sense-giving cooperation in organizations which break with traditional patterns of thinking of organizations and applies new logics to how companies are organized. This book influenced me a lot in that it made me reflect on taken-for-granted practices, values, things that always have been done like that within my own work setting. It confirmed my hitherto unconscious feeling that the way the sub-

unit was thinking of training and especially the cooperation with international markets is not suitable anymore for all the challenges, the complex, diverse and fast-changing world it was confronted with. I started to question the things we've been doing and asked myself whether there could be a new logic with which we would contribute to a higher goal, to a shared purpose which makes people like doing their work. I asked myself what our new logic could be. Combined with Volker Stein's feedback and my personality as such as being someone who searches for the new, the innovative, the horizons that transcend the common for the better, this book encouraged me even more to head for these new horizons, to actively start questioning the normal and aim for some kind of "next development stage" of my unit's work.

One important addition is to be made in order to better account for and provide a clearer picture of the context's complexity: The development I observed during research phase 1 and which I tried to support even more in phase 2 primarily happened in only one part of the HQ sub-unit, i.e., more specifically, within the team which was responsible for transferring the practice. That is, the sub-unit was – at the time of the ARE transfer – composed of two teams: One that was responsible for transferring ARE and another one which was engaged with proceeding with the "normal" training business. The analysis of research phase 2 will frequently draw on this team separation and its impact on the intercultural development of the sub-unit as a whole. In the following, I will therefore differentiate between the sub-unit team which is engaged in the practice transfer, the team that further carried out the normal training business and the sub-unit as a whole.

#### 6.5.4 Phase 2: Action research

While I was merely describing what, how and why things happened during the transfer of ARE to Spain in research phase 1, in the second phase of my research period, I was more engaged in actively supporting the development I detected in phase 1. How this transition came about

was described in the previous chapter. When I now would want to classify my exact mode of action research, I would probably never fit 100 % to one of the numerous ways action research can be executed (Reason/Bradbury 2008). I will now nevertheless attempt to describe my approach of action research and the analysis of data resulting from it in relation to existing classifications and practices. First of all, Reason and Bradbury (2008) propose as an organizing framework a classification of *first-* (inquiring into one's own life and the effects of one's own behavior on the outside world), *second-* (inquiring with others into issues of mutual concern, includes the development of learning organizations) and *third-* person inquiry (engaged in extending small scale projects to have a wider impact). My research embraces all three of them: I reflect on my own impact on the development of the organizational sub-unit and the transfer of practices while simultaneously engaging with the sub-unit in its own learning and development process. At the very end of my dissertation, I then also tried to foster the extension of the sub-unit team's development and learnings to the whole sub-unit and other HQ stakeholders as well as the international training community. Thus, following the description of Reason and Bradbury (2008, p. 6), I'm engaging in all three strategies. Additionally, in their guide for doctoral students engaged in action research, Herr and Anderson (2015) differentiate between insider and outsider research, thus the different ends of the researcher's positionality in relation to the research context. In this regard I have difficulties to rank my research: On the one hand, I am both researcher and practitioner at the same time, reflecting on my own practices and impact while simultaneously collaborating with other insiders with regards to their own development. In Herr and Anderson's (2015) continuum of research positionality shown in figure 25, I would therefore position myself somewhere between 1 and 2, although close to 2. On the other hand, I was not a practitioner from the very beginning. First of all and that's what I stayed during the whole research period, I was a researcher with the clear task of researching the specific case of practice transfer described above. For being able to do better, "closer" research, I became a practitioner very soon by taking over the responsibility of the transfer to Spain. Contract-wise, I stayed a researcher, employed at a university but contracted for the research project by the

company. Whenever I had to introduce myself to other persons within the organization, I frequently said: “I’m accompanying and looking at the transfer of ARE from a scientific perspective” – at least in the first two years of my research. Thus, I could also describe myself as an outsider researcher collaborating with insiders. Then, again, when I had finished research on the practice transfer being a practitioner involved and in charge of the transfer in parallel to being a researcher, I started to do action research, from both my perspective as a practitioner willing to improve our practical work and my perspective as a researcher who wanted to help the organizational sub-unit to reflect on learnings and institutionalize them as well as, of course, generate knowledge for the wider researcher community. If I would have had to introduce myself at that point in time to an unknown person – which I can’t remember that I had – I would have probably said: “I’m supporting the intercultural OD of my department for the sake of better intercultural communication and collaboration.” The following table visualizes the continuum of positionalities and shows how I am evaluating my position in relation to my setting – bearing in mind “that even the notions of insider and outsider are multilayered and fluid, and can shift at various times during a research study” (Herr/Anderson 2015, p. 37).

| Insider (1)  | (2)   | (3) | (4) | (5)   | (6) Outsider |
|--|---|-----|-----|---|--------------|
| Positionality of researcher                          | Contributes to  |     |     | Traditions  |              |
| 1. Insider (researcher studies own self/practice)    | Knowledge base, Improved/critiqued practice, Self/professional transformation           |     |     | Practitioner research, Autobiography, Narrative research, Self-Study  |              |
| 2. Insider in collaboration with other insiders      | Knowledge base, Improved/critiqued practice, Professional/organizational transformation |     |     | Feminist consciousness raising groups, Inquiry/Study groups, Teams  |              |
| 3. Insider(s) in collaboration with outsider(s)      | Knowledge base, Improved/critiqued practice, Professional/organizational transformation |     |     | Inquiry/Study groups  |              |
| 4. Reciprocal collaboration (insider-outsider teams) | Knowledge base, Improved/critiqued practice, Professional/organizational transformation |     |     | Collaborative forms of participatory action research that achieve equitable power relations                                   |              |
| 5. Outsider(s) in collaboration with insider(s)      | Knowledge base, Improved/critiqued practice, Organizational development/transformation  |     |     | Mainstream change agency: consultancies, industrial democracy, organizational learning; Radical change: community empowerment |              |
| 6. Outsider(s) studies insider(s)                    | Knowledge base  |     |     | University-based, academic research on action research methods or action research projects                                    |              |

Figure 24 Continuum of Positionality (adapted from Herr/Anderson 2015, p. 40f)

What Herr and Anderson (2015) describe in their chapter called – very pointedly – *Designing the plane while flying it* on the literature review within an action research setting is what came naturally in my case: They state that the literature needs to be in continuous dialogue with data, and both literature review and data analysis shall be ongoing. For example, when I re-analyzed the first interviews with sub-unit employees, I had a rough idea from my literature review about what organizational development is and how its intercultural dimension is conceptualized. The close link between organizational learning and organizational development, however – although being obvious –, was not on my agenda when I started to re-analyze the data. When I then came across expressions like “learning” or “recognizing” in the interviews I started to review literature on the topic of learning and of course, I then also came across this link. What the authors also state is that data

from action research needs to be approached holistically for which they provide an example from another dissertation. Here, DeLong (2002) describes her “masses of research data, a messy rummage of thoughts and ideas, confusion and chaos, and an excruciating need for order and clarity” (p. 288) which is reached through the process of “actual writing, reflecting, revising and revising again” (p. 288) and that one should “trust the process” (p. 288). Thus, picking out pieces of data is not what data analysis in action research is about. It is about looking at and integrating the data from various sources holistically. I realized that when I designed the first version of the table of content: For the first research part’s analysis and findings section, splitting up the data and providing pieces of it in separated chapters was no difficult endeavor. When I tried to do the same for the second part of my research I, by contrast, encountered difficulties. I just wasn’t able to name categories or define separate groups of data which point to the same. Similarly, I also tried to make use of MAXQDA for the second part’s data analysis and soon gave up because the tool didn’t provide me with what I needed in order to holistically make sense of the data. For me, in this stage, it was just too narrow in that it is aiming at separating pieces of data instead of looking at it as a whole. What I therefore first did – lacking any good alternative – was to write down the “story” of my research (Coghlan and Brannick 2014), trying to trust the process of writing and revising and reading, hoping for enlightenment and the emergence of a synthesis out of this process. After I had written the story down and already had revised it several times without really satisfactorily reaching the goal of synthesis, I came across Langley’s influential paper (1999) which, first, expressed exactly what I felt by saying:

“And this is where the challenge lies: moving from a shapeless data spaghetti toward some kind of theoretical understanding that does not betray the richness, dynamism, and complexity of the data but that is understandable and potentially useful for others.” (p. 694)

And second – although designed for qualitative research – it provided me with a solution for structuring and synthesizing the data gathered in the second research phase: In her paper, she describes several strate-

gies for making sense of process data, among them *visual mapping* and *temporal bracketing*. I will make use of both strategies in the subsequent data analysis part in that I will separate the data into temporal phases, successive periods which encapsulate the major development steps the sub-unit went through and also in that I will visualize these temporal brackets enriched by the surrounding of the development process itself, i.e. feelings, interpretations, contextual effects etc. When you now look at the second data analysis section, you merely find three broader chapters which represent a kind of order in the chaos of data, but still, always, look at all the data in a holistic way, regardless of their collection date, type or statements. More specifically, the applied order is a separation of the sub-unit's development into three broader time periods: Learning and reflection, consolidation and internationalization and turnaround.

The data that feed these three periods in this second part of my research is very heterogeneous: I re-analyzed the interview transcripts of HQ employees and one manager from research phase 1, applying the organizational development lens. I conducted six additional short interviews with HQ employees and another manager after the international conferences that took place in October/November 2019. Apart from these interviews, one of my interventions was an intercultural workshop with the sub-unit in May 2019 in order to jointly reflect on our unit's intercultural competence and stage regarding ethnocentricity, polycentricity and geocentricity. I recorded the whole workshop and transcribed it. Additional data from this workshop are visualizations drawn by the participants. Also in May 2019, I took part in an international conference called *Qualification Summit* where training managers and other representatives from the manufacturer's eight biggest sales markets were invited. On this conference, I was asked to design one item on the agenda that had the goal to inform the markets about the current state of the ARE transfer. From this intervention, which I will describe later in detail, I will draw on video data as well as presentation documents and observations. Then, the by far biggest intervention in terms of effort and time dedicated to its preparations was the before mentioned training conference in October and November 2019. The conference was split into three locations, i.e. three times the same conference took place but in different European cities, hosting differ-



ent participants. Here, I myself proposed to design one item of the agenda which was particularly dedicated to our organization's intercultural organizational development. I am able to relate the latter one to one popular practice of action research called appreciative inquiry – at least, I tried to conduct one on these conferences. By saying “I tried”, I mean that I was planning to do an appreciative inquiry but in the end was heavily restricted by my manager. Important to note here is that in July 2019, i.e. shortly after I conducted the intercultural workshop, the leadership team of the sub-unit and broader unit changed. That is, the manager who accompanied the transfer of ARE in my first research phase left and another one filled in. I will go into more detail about the impacts of that change on the sub-units intercultural organizational development later during data analysis. Apart from these active interventions from my part, I will draw on documents and video material from two so-called *lessons learned workshops* that took place in July and October 2018 after the first results and feedbacks of the practice' transfer were available. I was present in these workshops, too, but in that case more as a participant and feedback-provider from my experiences with Spain than a researcher. That is, I indeed can draw on my observations and a handful of field notes, but not to such a big extent that I would like to. These workshops are extremely important to explain the development of the organizational sub-unit, as they were examples of the too rare spaces of reflection in organizational settings (Roth/Bradbury 2008). Apart from all that data, I can draw on daily observations, interactions with colleagues, informal conversations during lunch time and coffee breaks, emails and meetings which allowed me to get to know current routines and practices. Also, for becoming familiar with “the way things are normally done” in an international setting in terms of HQ-subsidary cooperation or interaction it was good to attend another three international conferences in my first year of research in November, October and December 2017. At that point in time, I was just getting started with researching the transfer of ARE to Spain and attended the conferences merely as a helping hand for colleagues in the execution of the conferences. It nevertheless was an important part of my “socialization” within the organizational sub-unit.

The following table lists all data I'm referring to in my analysis. A separate list of the documents I used as well as a more detailed overview of interview partners combined for both research phases can be found in the annex.

|   | <b>Type of data</b>   | <b>Provider/Location</b>   | <b>Time</b>              |
|---|---|--|--------------------------|
| 1 | Semi-structured interviews  | HQ sub-unit: 1 Manager, 3 employees, 2 external consultants  | November / December 2018 |
|   |   | HQ sub-unit: 1 Manager, 5 employees  | November 2019            |
| 2 | Audio, Transcript and drawings                                      | Intercultural Workshop: HQ sub-unit team and leader  | May 2019                 |
| 3 | Videos about practice implementation                                | Qualification Summit: Presentations of NSCs from France, Italy, Spain, Canada and Germany; HQ sub-unit's reflections | May 2019                 |
| 4 | Field notes, drawings, videos, audio, transcript                    | "Appreciative Inquiry" on three conferences with HQ sub-unit and NSC from all over the world                         | October / November 2019  |
| 5 | Field notes, observations, emails, meetings, informal conversations | HQ sub-unit  | ongoing                  |
| 6 | Documentation material  | Lessons learned workshop with HQ sub-unit, external consultants and NSCs from France, Germany and Spain              | July 2018                |
| 7 | Documentation material and videos                                   | Lessons learned workshop with HQ sub-unit, external consultants and Coaches from Spain and the Netherlands           | October 2018             |

Table 7 Overview of data types and sources of research phase 2

In addition, Figure 27 gives an overview over the temporal bracketing of research phase 2 as well as the related events and data obtained from them described above. The events are differentiated by naming them reflection and/or intervention, based on whether the event was of a rather reflecting nature or an active intervention from my part as an action researcher. Only two events aren't labeled with any of the two terms: first, the lessons learned workshops as in these cases I was only acting as a participant without having any research motives (I nevertheless add the documenting material from this workshop to the data set); and second, the new leadership which came in at the very end of my research period and marks the beginning of the turnaround phase.

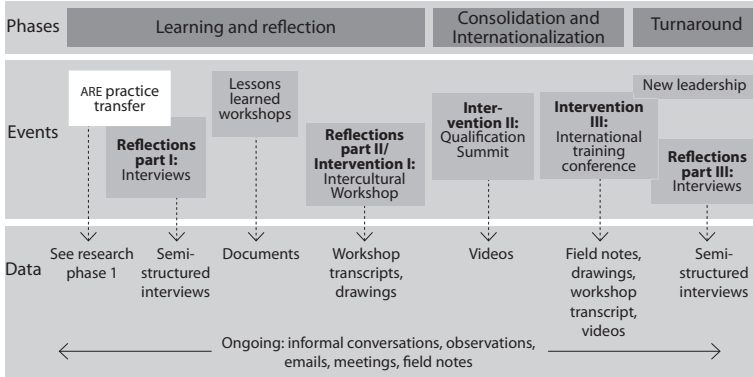


Figure 25 Temporal bracketing of research phase 2

## 6.6 Summary

Chapter 6 has shown the evolution of the research design in accordance with the shift in research focus and has outlined the general context within which both research phases take place. It has also displayed the variety of data sources and events that took place in the run of my research period. The following visualization shows the chronology of the two phases including its main events and interview rounds. The grey colored parts mark my major data collection points. This visualization is merely meant for giving an overview over the time span each research phase covered and may not be confused with the temporal bracketing figure presented in the previous chapter.

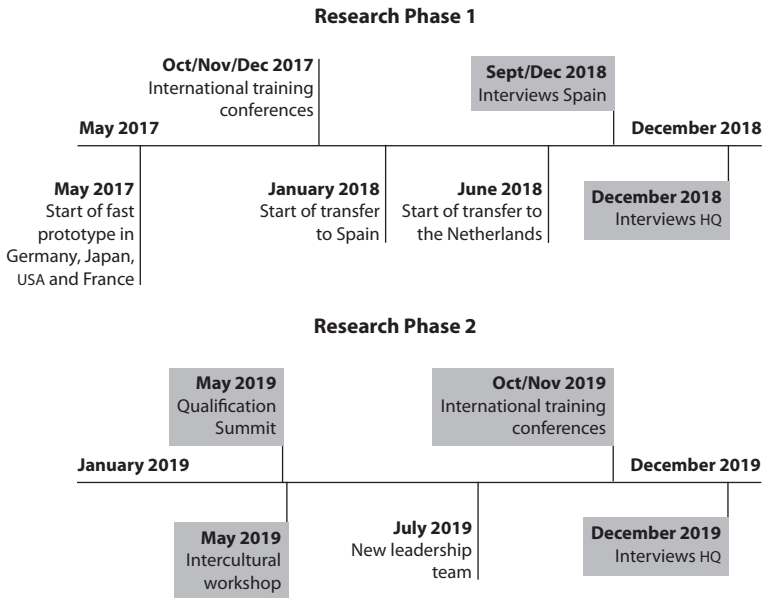


Figure 26 Chronological overview over research phases

The result is a very complex and unconventional design which seems to be separating the thesis into two, at first sight unrelated parts, just like the theoretical framework did. However, the close link between the two different research topics outlined in chapter 5 is reproduced in the underlying research design in that the ethnographic case study which investigates the international practice transfer can be considered as one integral part of the broader action research I undertook in order to both further investigate and promote the organizational sub-unit's development. The first part of research was a necessary step in order to make all further research in the way it was undertaken happen. One could even think of it as part of the diagnosis phase of a classical action research cycle (Susman/Evered 1978) which informed subsequent actions and interventions. I indeed could have presented it like I had planned for an action research design from the very beginning but this was just not the case.

In the following data analysis part I will first analyze the data collected for the first phase of research along the particular framework of analysis presented in chapter 2.4. After shortly discussing the findings, I will turn to the analysis within the second research phase. Here, the structure is oriented along the temporal bracketing and the respective events presented in 6.5.4.

## 7 Data Analysis and findings

### 7.1 Research Phase 1: International practice transfer

The first research phase was concerned with investigating one particular transfer of the practice to three Spanish dealerships. This first phase can be considered as the diagnosis phase of the broader action research design I applied within the study. Thus, in this first phase, I was primarily observing in order to provide a description of the status quo. Thinking of the conceptual framework of the study, the following chapters under 6.1 refer primarily to the first circle called “International practice transfer”, gathers information about it and already somewhat touches on the experiences gained from it in chapter 7.1.1.1.

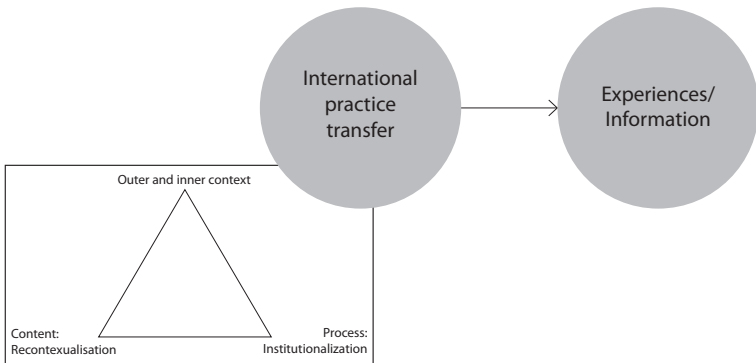


Figure 27 Extract of the conceptual framework chapter 6.1 touches on

#### 7.1.1 Context: Organizational and individual level factors

Regarding the contextual factors that are present and influence the transfer of ARE, four factors shall be discussed in the following as they turned out to be most important from my (participant) observations

and were the most prevalent across all interviews: 1) HQ's transfer strategy, 2) compatibility with practice, 3) HQ-subsi-dary-dealer relationships, 4) transfer coalition and 5) shared cognition.

### 7.1.1.1 HQ transfer strategy

First, on an organizational level, the HQ's transfer strategy shall be considered (Ansari et al. 2014; Björkmann/Lervik 2007). As already mentioned before, I noticed a major change in the strategic orientation among my colleagues at the HQ sub-unit during the practice transfer phase: Whereas at the beginning remarks like "we need to show them down there how it works" or "every single element of the new practice needs to be implemented" were very present, over time terms like *co-creation* and *flexibility* became popular and more and more exchange took place in order to get to know subsidiary initiatives in topics related to ARE.

The transfer project lead describes the change as follows:

"Over time, I learned how flexible we need to be and that we cannot transfer ARE [...] into the world one-to-one. And that's why in my opinion, when we think of it as a timeline, the importance of flexibility or the level of flexibility that we need to apply has increased. One and a half years ago, I thought that we could change more things in a way that is the right one from our point of view and in an approach that we have chosen. In the meantime, I think that we cannot do that anymore. Or, more specifically, that we have never been able to do it but just have thought that we could." (E1, HQ)

All colleagues as well as the two external consultants whom I interviewed during the first research phase state that there is more flexibility needed when it comes to the transfer of ARE. One of them compares being flexible with being pragmatic which for him means to not overengineer things or try to provide for all contingencies (E2, HQ). A similar statement is made by E1 who reflects on the approach to the transfer being very German in the sense of providing a "program thought out down to the smallest detail" which might just "overwhelm" those who are asked to implement it. Very often the term „flexibility“

is also related to cooperation and working together. E1, for instance, formulates: “Either we open the door for flexibility and cooperation or we just continue as we have been doing so far and our efficiency scope will soon be over“ (E1, HQ). On the question of what to change or optimize in the future, the general opinion among the sub-unit team members is to put more effort in getting to know what the framework of the specific subsidiary and dealership looks like, what the current market situation is, what their challenges are and how their “normal” way of doing business looks like in order finally find solutions together (E1, HQ; E2; HQ; E3, HQ). This attitude towards the transfer approach changed first because of the realization that it’s simply not possible to think of a one-size-fits-all solution of ARE – especially as its main goal is to increase customer experience which at the end it is “defined by the customer” (E1, HQ) whether it was a good experience or not. Second, it changed because the sub-unit learned a lot by being open for adaptations, “things that are a lot better and we wouldn’t even have thought of” (E2, HQ). E3 even says:

„I think [...] we need to apply more the stakeholders’ perspective, that is, real co-creation in order to steer the permanent innovation process that we need. That is, less content, more networking opportunities, which are well structured and were we offer space to foster exchange between stakeholders and use this exchange productively. [...] In this respect, we could really reach a next level.“ (E3, HQ)

E1 also expresses a strong vision that involves bringing all people together who work with the practice in order to learn from each other, get back home and integrate these learnings in their own working environment. It therefore seems as if the sub-unit is on its way from an ethnocentric strategy that ignores or plays down cultural differences on to a rather polycentric or even geocentric strategy that tries to use of them constructively (Barmeyer 2018; Perlmutter 1969). In addition, all interviewees demonstrate a very positive attitude toward the transfer project and name the way it is dealt with as being good, better, fun, new and different to the transfers which have been pursued in the past.



At the same time, they state that there still has to be a common theme, a central idea or kind of a “brand essence” (M1, HQ) of the practice that needs to be maintained in spite of all the freedom and flexibility that is granted. In the course of the transfer, this balance more and more manifested itself in terms of defining some fixed elements of the practice which had to get implemented in any case while others were considered as recommendations. For instance, one of the four personnel roles turned out to get interpreted very heterogeneously across the first countries which adopted ARE or wasn’t adopted at all. Thus, both in the conversations with potential “newcomers” to the practice as well as in the formal dealer contracts which dictate standards that have to be fulfilled by dealers in order to be allowed to distribute the brand’s cars, this role wasn’t included as being mandatory. In addition, the consensus in the sub-unit team emerged that the “big headlines” of the practice, i.e., for instance, the process steps of the new sales process or the three remaining roles, are set while the exact interpretation of these headlines was up to the subsidiary or dealership. A similar strategy of balancing global integration and local adaptation was described by Ansari et al. (2014) in their study on how practices “are made to vary” (see chapter 2.1.2).

But how was this attempt to balance flexibility and maintaining the core of the practice perceived at the NSC and recipient unit level? Interestingly, the Spanish project lead values that there was a lot of freedom to adapt ARE to the different dealership realities but reports that SM1 (Madrid) answered her question of what would have had to be done differently or what he has missed: “I missed some more guidelines.” The same is also expressed by one of his employees (E1, Madrid). Apart from that, the NSC project lead appreciates very much that there was a very close cooperation between the HQ and herself. She hasn’t experienced such a close relationship in any other project with the HQ in the past:

“It was good. We had a lot of freedom but also a lot of support! We’ve never had that much support like you and your colleagues gave us in any other project before. In the past, it was more like: Look, there’s a new training module, you can download it here. That’s what we have

been used to. Sometimes there was a train-the-trainer [...] and then we went back home to our country and tried to complement it.“ (Project Lead, NSC)

Furthermore, she values the continuous dialogue between her and the HQ, as she never felt alone within this new, transformational project.

Writing this down makes me reflect about my own impact on this feeling the project lead expresses here. The transfer to Spain was probably – compared to the other transfers I was able to observe and which were taken responsibility for by colleagues – a rather unusual case in that I dedicated a lot of effort and passion. I don't want to say that others haven't dedicated that much effort and passion as well! However, my emotional attachment to Spain, my language skills, my experiences gained from living in Barcelona as well as my primary task of researching this transfer which allowed me to be on site frequently – these conditions probably favored this feeling and the transfer as a whole. These conditions weren't existing in other transfer cases. While I have been to Spain more than ten times for the sake of researching on the transfer, the other transfer responsible wouldn't have had the possibility to be there that often – not even to some extent. I was free to decide upon my dissertation travel budget while my colleagues were more restricted in this regard. Apart from that, the transfer lead and I liked each other and we shared some common interests. She even invited me once at the very end of the transfer period to stay at her guest room instead of a hotel – an offer that I accepted. Thus, a number of reasons that relate back to me as a person might impact this feeling of supportiveness and help positively.

Similarly, the two coaches who executed the trainings within the practice transfer highlight the importance of the flexibility regarding both the characteristics of the practice and the training design granted by the HQ. C2 underlines that the possibility of using that freedom made the people proud of their dealership:

„You left us space. Without it, it wouldn't have been possible. [...] That is, a dealership that really wants to give the best, wants to show that it's different, and for the first time [the HQ] let's them unfold because even if there are some standards, within these standards they can differentiate themselves with that project.“ (C2, NSC)

And also from recipient unit side, interviewees expressed that they even felt this flexibility to be necessary as each dealership is different and therefore the practice has to be adapted to each respective “dealership personality” (E2, Madrid) – also in order to make it more natural and feasible. The sales manager from Madrid explains:

“It came to us very incomplete. For me it's a great opportunity because I'm able to customize it a little more [...] I fully agree with the personnel model, it's perfect. I fully agree with the steps of the sales process and that they are flexible. But when it comes to the details, there I feel that we are entering co-creation. [...] What's not bad because it makes us participate and makes us feel as if we are setting it up together with you. And that it's not nobody's project but everyone's, you know?” (SM1, Madrid)

For him, the fact that the practice is not complete, that there is space to be creative and *customize* it while agreeing with the overall framework of the practice, results into co-creation and gives him and his team the opportunity to make it their own and feel part of it. This quote also reflects the adopted HQ strategy very well, as he states to agree with the “big headlines” of the practice, while, when it comes to interpreting the details, he is free to do so. This quotation already encompasses all three categories of practice transfer by relating the perception of the HQ's strategy of letting space and co-creation (part of *inner context*) to adaptation (*content*) and institutionalization (*process*).

#### 7.1.1.2 Compatibility with practice

Another factor on organizational level is the compatibility of the recipient unit's culture with the practice: On the one hand, compatibility with the practice exists if the recipient's organizational culture is favoring learning, innovation and change, on the other hand if the recipient

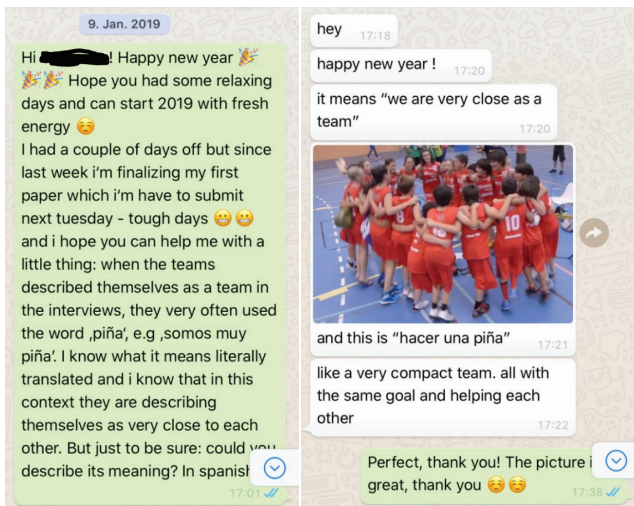
unit already is experienced in topics related to the practice (Kostova 1999). In other words, the practice may encounter a fertile organizational context (Szulanski 1996). I was able to detect three main compatibilities: The first one relates to the dealers organizational culture: The Madrid dealership, for instance – as SM1 (Madrid) mentions at some occasions and the country coach states in his interview – has a culture of always participating in pilot programs in order to “always be in contact with all the new things that come up” (CC, NSC). Additionally, SM1 (Madrid) recently joined the management team and indicates that he anyway was about to introduce a more customer-centric orientation within his sales team and that ARE was the perfect possibility to move his vision forward. This can also be referred to as compatibility with the practice. Similarly, in the case of Zaragoza a compatibility of the practice with the present organizational culture can be shown: In terms of the overall goal of the practice, i.e. increased customer experience, the dealership already implemented own initiatives and even was engaged in a continuous customer experience project, strongly supported also by the middle management – they were therefore “departing from a very high level of customer orientation” (CC, NSC) or, in other words, were already experienced regarding the central aspect of the practice (Björkman/Lervik 2007). The dealership in Bilbao provided with similar conditions: I always felt very welcome at the dealership and above all, the leadership and team members expressed their willingness to try out things and promote change at a lot of occasions during my visits as well as in their interviews (SM3, Bilbao; E1, Bilbao).

The second compatibility with the practice, I was able to discover, is the dealer teams’ team orientation. Introducing three new personnel roles and fostering teamwork between them in a retail industry where salaries are traditionally promotion-based and competition between sales staff members is high – challenges in that respect seemed to be inevitable, at least from the German HQ’s point of view. That’s why the training material placed a lot of emphasis on supporting team spirit and cooperation: “The assumption was that working at a car dealership at the moment is not very team oriented. This is why there was a big focus on the team when designing the training material” (E9, HQ). Interviewees from all three dealerships indicate that they either already

have been very close to and supporting each other or the practice has helped them to get even closer and more team oriented. One sales advisor from Zaragoza for example said:

“It’s incredible, the fellowship around here, I haven’t experienced this in any other place [...] I’m nobody without my sales manager, I’m nobody without [one of the new roles], I’m nobody without all these persons around here.” (E4, Zaragoza)

And also C2 (NSC) observed that the practice helped to bring them even closer together and that they value that they are now dealing with the customer as a team and not as a single individual like before. A term that was frequently used in the interviews as well as in conversations during my visits when describing the team orientation was “piña” which literally translated means “pineapple”. It was always used in combination with “hacer” or “ser”, meaning that people are very united and as thick as thieves. To get sure about its exact meaning in this context, I asked CC whom I had close and a fast communication with:



The picture CC sent helped even more to understand the meaning associated with this expression and also allows for gaining an idea why the

word pineapple served as a grounding for this metaphor. Thus, the practice was compatible with the dealer teams' already given unitedness and fostered it even more through its emphasis on working as a team. Furthermore, the practice in its team orientation fits well with the Spanish culture in general. In my findings presentation to the Spanish transfer responsible, she – being a non-Spanish person, but French with Italian roots – describes after I showed her this compatibility:

“What I experienced is that the Spanish need their family like crazy. And then they build families everywhere: With friends, at school, at work, that's how they do. It's part of their genes, they need to belong to something, they cannot stand for their own.” (Project lead, NSC)

This compatibility shows how well the practice fits with the Spanish-Romanesque, personalist understanding of organizations: While the Anglophone functionalist understanding views organizations as a system of tasks, functions and goals, the personalist view on organizations understands them as a social system that unites a community of people to work on a project (Amado et al. 1991; Barmeyer 2010).

Another, third compatibility that can be detected is that everyone seems to have already been waiting for a practice like ARE to come: Almost all interviewees express for example a strong need for a new sales process because the one they were working with before is “old” (SM3, Bilbao) and “out-dated” (E7, Zaragoza) and not responding at all to today's customer needs. In addition, the sales advisor's job is getting more and more challenging, as cars are getting more complex, digital, difficult, and time consuming to explain to customers. The practice and its new personnel concept provides an answer to these challenges which is very welcomed:

“Yes, I feel better because I see that they are giving me more time which I haven't been able to dedicate to the customer before. [...] I'm more agile now to immediately give the customer what he is asking me for.” (E5, Bilbao)

“The cars have changed a lot and contain so much technology that the sales advisors already developed a kind of fear of not knowing where all this will be going.” (E7, Zaragoza)

“Actually, we already have been talking about it and knew that it’s necessary, right? A change [...] in approaching the customer.” (C1, NSC)

One could therefore say that the practice fell on fertile soil in various aspects and on different levels: First, in terms of the current organizational culture of each single dealership, second, in terms of the Spanish focus on family and social relationships (Rehbein et al. 2009) and third, in terms of overall industry challenges, the dealer teams were confronted with and the practice provided a solution for.

### 7.1.1.3 HQ-subsiidiary-dealer relationship

Another important factor are the relationships between the parties involved. For the sake of getting to know each other as a basis for co-creation, for example, openness and a trustworthy relationship is seen to be imperative at the HQ. In order to reach that level of trust, regular meetings, conversations and visits are seen to be very helpful and irreplaceable (E1, HQ; E2, HQ; M1, HQ). In the case of Spain, E2 (HQ) had some experiences from previous practice transfers to Spain and already knew the Spanish project lead very well. During one visit, the project lead openly expresses her happiness about the joint, new project. E2 appreciates very much that communication with the project lead can be in German: The Spanish project lead has a very European history, having Italian roots and growing up in France, long working and studying experiences in Germany and Spain and being married to a British. The practice transfer project improved and intensified their and also my personal relationship to the Spanish project lead even more:

“Well, the relationship has intensified. You always have been there when we needed support. Even when I had my personal problems with my boss! Some would have just said, well, I don’t want to have anything to do with it and would have just closed their eyes and waited. In this respect, I got to know your very human side.” (Project Lead, NSC)

Further, I was able to observe how NSC staff and dealership representatives interacted and consider their relationship as very close, informal and also full of respect and trust. One of the sales managers describes their relationship as follows:

“We have always collaborated with [the Spanish NSC]. They said, there is a project, we count on you [...] You need to collaborate and support, we thought it was a good idea. We don't say no to anything. When [the NSC] introduces you to an idea, the idea has not been developed within two minutes. We know that they have analyzed it. I always say when [the NSC] says: 'engage in that', I say 'do it and ask afterwards. They won't cheat you.' There is a lot of trust.” (SM2, Zaragoza)

This statement coincides very well with how the project lead describes their relationship: The dealerships are very “obedient” and practically take part and agree in everything the NSC proposes. And although the project lead describes a certain dependence that is expressed in the NSC's power of resource, meaning and processes in a lot of areas of the business (Ferner et al. 2011), she also agrees on my observation of an informal and close relationship. She further points out that a recent change in the NSC's top management positively affected the NSC's relationship to the dealerships as it now intends to foster a close relationship with them by “naming the dealer representatives by their first names, asking for their opinions, involving them” (Project Lead, NSC). This is also mentioned by another dealer sales manager, who says that he now is “very satisfied” (SM3, Bilbao) with the NSC because he perceives them as “a lot more human. They organize meetings in order to foster communication with the dealers where you can say 'look, these are my problems.' For me it's a great step for bringing the two lines together” (SM3, Bilbao). He summarizes that all three levels, i.e. the German HQ, the NSC and the dealers, need and complement each other by fulfilling different roles and responsibilities but that there have been deficiencies in communicating and understanding each other before that management change. He highlights that all three levels have to “come closer together” (SM3, Bilbao).



I also sensed the emphasis on establishing a good relationship with dealers later, when it was decided to rollout the practice in the whole dealer network in Spain. At that time, another kick-off took place, where the higher and middle management of additional dealers was invited into a five star hotel in Madrid to get introduced to the practice and the experiences made during the pilot phase. I was invited to that kick-off as well and was asked to talk about the global HQ actions in terms of the practice' implementation. In addition, I supported the project lead in explaining the practice to the "newcomers". In our preparation for that kick-off, the project lead stressed at several occasions how important it is to make this kick-off a real "premium" event. This was intended to demonstrate the NSC's commitment and importance dedicated to the practice and its implementation. After the kick-off meeting, all participants were invited to a premium dinner on the hotel's terrace. For the project lead it was also important that "someone from the HQ" is present and talks about the practice project. By contrast, for instance, the Netherlands never asked me or my colleagues to visit them for a kick-off and supporting them in explaining the practice to the dealers. Having made good experiences in Spain, we offered our support at some occasions in the transfer process, but never were asked to actually come over nor did we insist to.

A main difference in our interaction with Spain and the Netherlands was that the communication with the Netherlands was much more formalized. For instance, we always agreed on a certain date for a phone call. With Spain, I did that as well, but very often, we just quickly communicated via Whatsapp or gave us a call whenever we needed an information or wanted to share one. This difference in communication styles was also expressed by E1 who contrasted his own interaction with the US and another colleague's „better“ communication with Canada regarding the transfer:

“They are exchanging regularly about other stuff as well, they know each other for years, they do trust each other [...] It's so important to be in regular contact! That's a thing that was complicated with the US: When you have a weekly call, you are forced to think about what exactly to say and ask during that call, basically, you are placing a filter. And very often,

the result was: There's nothing new! But when you are writing emails anyway every day, when you are in contact every day, you can ask questions you wouldn't consider worth asking in an official call! And that's, I think, leading to a relationship where problems are openly discussed, where there is much more transparency" (E1, HQ).

To sum up, in the case of Spain, there seems to be a very good in the sense of supporting relationship across all levels that are involved in the practice transfer. Like Szulanski (1996) has theorized and shown, an arduous i.e. a rather distant relationship between the source of knowledge and its recipient is one of the most influential origins of stickiness. This contextual factor is therefore considered as very important and positive in the present case of practice transfer.

#### 7.1.1.4 Transfer Coalition

What has also been shown to be essential in international practice transfer is the existence of a capable transfer coalition, i.e. a group of people who is in charge of the actual transfer and dedicate a lot of effort to it (Edwards/Molz 2014; Klimkeit/Reihlen 2016; Kostova 1999; Soderberg 2015). In the present case, the transfer coalition consists of persons originating from the NSC, the dealership level and the HQ, i.e. myself, as well. First of all, the project lead, the person who officially is in charge, is perceived from all involved parties as being very "implicated" (C1, NSC; CC, NSC), highly motivated (E2, HQ), committed to the practice and dedicating very much effort, time and energy to the transfer: "A 24 hours' day for her has 48 hours or even more" (E3, HQ). The project lead describes herself as very experienced in her work – especially in training issues which in turn provides her with a lot of credibility and trust from part of the dealerships:

"For the dealers it's good to see that I am in charge of the project. I think, they feel more secure because they have been satisfied with the trainings I did in the past. That's why when I now propose ARE to them, they say ,Okay, fine!' instead of 'Oh my god, where does that come from?'" (Project Lead, NSC)

In general, all HQ employees named her as one of the main factors of success. That is, the project lead as both officially being in charge of the transfer and being an expert in training is an important stakeholder within the transfer coalition (Kostova 1999, p. 317).

The coaches who executed the training sessions are working in close collaboration with her and were essential for actually transferring the practice via trainings. In the case of Spain, they both are very experienced, know the dealerships very well and for years, have profound knowledge regarding the characteristics of the practice (CC, NSC; C1, NSC, E3, HQ), like what they are doing, are committed to the company they are working for (E9, HQ; E3, HQ) and are able to work with the people in the dealership in a very collaborative and trusting way. There is a lot of feedback expressed from the employees relating to the coaches and the training sessions, such as:

“I loved the trainings, I learned a lot and [C1] transmits a lot of security, empathy and energy, you know? I really have a good relationship with him.” (E3, Madrid)

“I like him very much. He is one of the trainers who involves you, animates you and makes you think.” (E5, Bilbao)

Apart from the coaches and the project lead, another important person forms part of the transfer coalition: the so-called country coach who was selected by the HQ and proposed to the NSC as additional support for the transfer. He is someone “who builds the bridge to the culture and the organization and who feels responsible for the topic. Someone who really sits like at half of the bridge and communicates benevolently to both sides” (E9, HQ-External). This role is also described as a kind of “transmission belt” or “a translator, in order to be able to understand one another” (E10, HQ-External). Also for the project lead, his involvement is essential: “[CC] is essential, for me, he has done most of the work, because I am between you and my department, but he is between you, the coaches, me and the dealers. So, I think, his elasticity is a lot higher!” (Project lead, NSC). Here, a closer look at the concept of boundary spanning (Barner-Rasmussen et al. 2014; Birkinshaw et al. 2017; Schotter et

al. 2017) could have been useful – also from a cultural perspective as the CC has a German background and studying and working experiences from Germany, France and Mexico – but is not covered in this thesis. The CC also is the person with whom I was most in contact with apart from the project lead. He was always present when I visited the dealerships and the NSC, and I perceive him as someone who is fully committed, very experienced in the topic of customer experience and change management, very international and able to explain culturally sensitive topics on a meta-level. Together with the project lead, he is also considered a central success factor from all HQ interviewees.

Apart from that, the coaches and the country coach are essential when it comes to encouraging the people in the dealerships to try out elements of the practice even if they had doubts about them and to adapt them when these doubts continue to exist. This element of their work within the transfer coalition is more closely looked at in the following section on the practice' institutionalization.

When it comes to the dealership level, all three dealerships show an important similarity: In each of them there is at least one person who acts as a change agent – the person who invests most into the execution of the practice pulling others along with him or her. Although this similarity exists, there is one important distinguishing factor within it: In Bilbao and Zaragoza, the most dedicated and committed persons form part of the management team whereas in Madrid, a very visionary and committed leader is complemented by two persons from the team itself in the pursuit of pushing the practice. The CC, for example, tells about the sales manager from Bilbao that “you notice that he has worked with the team and has reinforced things from the beginning” (CC, NSC). I as well perceive this sales manager as very committed: He took part in all training sessions, reinforces what was said there from part of the coaches and fosters the active participation of the team. Nevertheless, the fact that there are two team members in Madrid, who emerged as kind of “main supporters” of the practice might have a big impact on the institutionalization of the practice there:

“[E2, Madrid] already has been working for the dealership for a very long time and he is the first who pushes all others: the sales manager, the rest of the team, [E3] who is also very proactive. This is one of the key success factors in [Madrid] that [E2] was hovering over and pushed the project a lot.” (C1, NSC)

E2 indirectly bridges his active involvement to a possible sense of ownership which is an essential part of the dimension of practice internalization (Kostova 1999) by stating that he and his colleague invested their selves into the execution of the practice (Pierce et al. 2001):

“[E3, Madrid] and I have taken on the leadership in this project but we are happy doing it. [...] we had fun and we also worked a lot. We have dedicated a lot of hours, sometimes even outside of our working hours to design [elements of the practice]. We have dedicated time but also because we were motivated to do it.” (E2, Madrid)

How much this leadership from within the team influences the process of institutionalization shall be further discussed in the subsequent chapter. The last member of the transfer coalition is me. But what exactly is my position here?

My position with regards to the transfer coalition is threefold: First, I am a HQ representative, officially in charge of managing the transfer from the HQ side. Therefore, in Kostova’s (1999) words I am a *core* member of the transfer coalition but also an *expert* member, as I know the practice inside out. Second, I would also consider myself as a kind of boundary spanner between the HQ sub-unit itself and the Spanish in the sense that I identify with both sides and was always trying to promote mutual understanding between them. If I would need to specify the relation, I was probably more engaged in explaining and making sense of the Spanish way of doing things regarding the practice to my fellow colleagues and managers than the other way round. I wasn’t doing that in order to arm myself against contradictions from the part of my colleagues but rather because I wanted them to gain the full picture of the Spanish way

of implementation. As I was frequently on site in Spain and had such a close contact with the project lead and the CC, I was able to tell a lot of “Spanish stories” in meetings and daily interactions in the sub-unit. I also frequently shared written accounts from Spain with the broader HQ team. Among all the stories from the transfers into the different countries, the Spanish proportion of stories was the highest. The Spanish examples were the ones shared with a broader stakeholder group outside my HQ sub-unit, simply because from Spain we had most information. That way, I contributed to a very positive picture of the Spanish NSC as being very diligent, progressive and good to work with within the HQ, not just within the specific sub-unit. And third, of course, I was part of the transfer coalition in my role as a scientific investigator of the transfer. I always was transparent about this role, although I assume that most people, especially the ones on dealership level, saw me more as a HQ representative rather than a researcher. But, my research undertaking impacted the actual transfer insofar as the people I interviewed at one or another occasion expressed their happiness about being interviewed because it showed how important the recipient unit team’s opinion regarding the practice of ARE is to the HQ which was considered as being a good thing (e.g. E7, Bilbao). To sum up, I consider myself as another important part of the transfer coalition, above all because of the “marketing” I made for Spain inside the HQ and the close investigation of people’s opinions regarding the transfer for research reasons on the one hand and for improving the practice on the other hand.

All transfer coalition representatives together form a very strong union (Kostova 1999) when it comes to transferring and implementing the practice and is far from the ceremonial type of transfer coalition like Klimkeit and Reihlen (2016) describe it. Rather, it can be considered as really entrepreneurial due to the effort dedicated and the trust and courage to test a wholly new practice of which the outcomes and economic results are highly uncertain. And again, personal relationships between these persons are highly important, at least in the Spanish case, which is expressed by a lot of interviewees: “When I know that you and

[C1] and [CC] will visit us, we are all happy because we consider you as being part of ours, really! Like part of our family.” (E2, Madrid)

Figure 30 shows a visualization of all transfer coalition members and their roles involved as well as their belonging to the three different organizational layers:

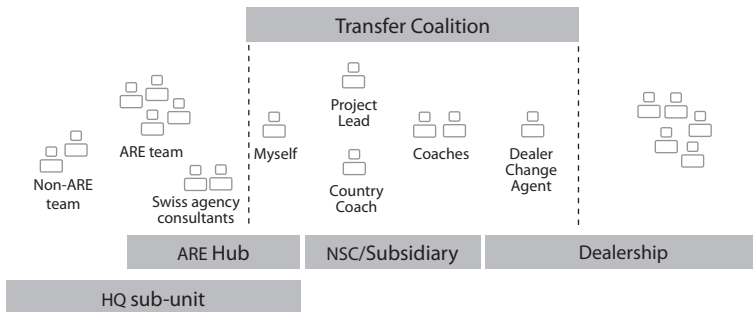


Figure 28 Transfer coalition members and organizational layers

### 7.1.1.5 Shared Cognition

What additionally emerged as being relevant when considering factors that influence the international transfer of practices, is the notion of shared cognition. Björkmann and Lervik (2007) state when describing shared cognition as one influencing factor within practice transfer:

“Common stories about the successful use of HR practices at headquarters as well as in other MNC subsidiaries may lead to mimetic motivations for implementation and integration of practices in the subsidiary and may furthermore lower the costs associated with their implementation and integration.” (p. 328)

These stories, “full of seemingly insignificant details” (Nahapiet/Ghoshal 1998, p. 254), enable the exchange of practice and tacit experience, the creation and transfer of new interpretations and might contribute to the practice’ improvement (Nahapiet/Ghoshal 1998). As already touched upon in the previous chapter’s reflexivity pause, stories about ways of implementing the practice, about its actual outcomes and examples of local interpretations were very valuable resources in both marketing the

practice in front of other markets as well as internally when it came to winning additional financial or human resources support. Whenever I was involved in presenting the practice to internal or international stakeholders the practical examples, the stories from other countries were obviously the most interesting parts for the listeners. E1 (HQ), for instance, stated:

“These stories you can tell from the implementation, the challenges, the funny stories, die interpersonal stories, the approaches to problem-solving make the project tangible. When I just stick to explaining the concept in its abstract form, I hardly have a chance. In my internal presentations [...], 20% is about the content of the concept, 80% is about the how and the why and how did you solve this, what are your experiences with that... That is, basically it's more about telling these stories than about what we actually wanna do. That's pretty interesting.”

E1 (HQ) even calls these stories a “Währung”, literally translated a “currency”, in the sense of being a really valuable asset. Thus, in this context, the stories are considered a “Währung” that helps the practice ARE gaining popularity and acceptance among a broader group of countries as “it transmits the security to approach the topic and deal with it” (E1, HQ).

Also, from the Spanish part, drawing on these experiences was essential or even could have been more, as is shown by the following statement:

“During the first months, the main thing I was doing was being in contact with the Hub<sup>3</sup> and with the other country coaches in order to get to know more about their experiences. [...] The person who really helped me the most was [the US country coach]! She told me everything about what she experienced, what worked, what didn't, I listened to her advices. [...] For me as a country coach it was fundamental to be able to draw on the other coaches' experiences.” (CC, NSC Spain)

3 That's how the German transfer team composed of the HQ sub-unit members and the external agency was called during the pilot phase



This experience sharing even institutionalized in regular, so-called country coach calls, where all coaches met virtually to give each other updates and tell stories about challenges and successes.

On a broader, international level, the first activities regarding sharing the stories and examples from implementing countries took place during the first conferences I attended end of 2017. There, the sub-unit ARE team presented the practice' "theoretical" content and the first activities regarding the practice' implementation. A second, official sharing of "ARE stories" then took place during the second conference, the Qualification Summit in May 2019. Here, E2 and I were responsible for designing a presentation about ARE and its implementation status to update the international subsidiaries. Following on the experiences made during the first transfers of the practice, it was clear for us to let those speak who actually transfer the practice and bring it to life: the market representatives or transfer responsible respectively. We therefore asked five NSCs, namely Spain, Italy, France, Canada and Germany to prepare a Pecha Kucha presentation<sup>4</sup> to share their story of ARE. Also, my colleague and I prepared a presentation telling our HQ-sided story of ARE. This format in terms of both "telling stories" rather than holding fact-based neutral presentations and inviting several representatives from NSCs to come on stage is new – at least as far as my observations are concerned. Traditionally, when a conference was organized by the HQ, it was HQ managers and employees who took care for the contents and presentations. The motivation behind was that from our experience as HQ sub-unit managing the transfer of ARE practical stories from countries and dealerships which already are implementing the practice are very valuable to fellow markets – regardless of whether the NSC has already transferred the practice or not. This design was heavily supported by the whole sub-unit and its management.

The sharing of experiences regarding ARE intensified on my third row of conferences end of 2019. From the very beginning of planning for these conferences, it was clear that the Spanish CC shall be involved

4 Pecha Kucha is a presentation format which draws primarily on pictures and aims at transferring an idea or information in its very essence because the place is limited both in numbers of slides and time.

in the design of these conferences' content as an "expert from the market" in terms of ARE implementation. Together with him, I designed a 60-minutes format called "ARE stories". Together, we collected stories from the implementation and summarized them under several chapters like "The ARE team spirit", "The flexibility dilemma" or "What makes it last". Obviously, most of the stories originated from Spain. This format was among the highest rated ones among all presentations and workshops in the conferences' evaluation survey. In addition to that, the Spanish CC was involved in other presentations of the conferences concerning the more training materials which support the practice' implementation. Here, his share of speaking was higher than planned for, as the conference participants posed so many questions to him and were more interested in his opinion and practical examples than in those of the HQ instructors. Participants expressed verbally or in a written form in the conference evaluation survey that "to see the Spanish approach was fantastic for inspiration" and that among their favorite topics on the conference agenda were the ones where the Spanish CC was involved.

The value of being able to draw on these experiences, stories and examples from other countries was also highlighted by the other two Spanish coaches (C1, NSC; C2, NSC). Equally, on dealership level, I learned that each story you can tell – like, for instance, "Look at what the dealership in Bilbao created as an unsolicited gift! It's a praline produced in Bilbao, with a piece of salt on it because, you know, Bilbao is located in the north of Spain and there are a lot of salt farms in that region" – shows, on the one hand, that it's exciting to engage in localizing the practice and that it's doable on the other hand. For instance, for the kick-off for the practice' rollout in Spain, the sales manager of the Madrid pilot dealership was invited, too, in order to share his experiences with the newcomers. He was one of five presenters during the kick-off and the one who got most of the questions.

Apart from the stories of implementation that might be able to foster implementation in other countries and dealerships, community building might be adding to that, as E1 (HQ) expresses:

“Another huge factor for me is the community issue. To create a community of likeminded people, who encourage one another on both NSC and dealer level. That’s my vision: I would love to have, someday, an [one of the roles’ name] day, where [the same role’s name] from all over the world sit together and on the one hand understand, how many of them there already are, proud of being working for the brand, and on the other hand learn a lot from each other and take these learnings back home. I would love to see that happening and that’s the vision which drives me: That someday we can say: Look at that, today there are so many people engaging in this.” (E1, HQ)

Approximately one year after this interview, this vision was in parts realized: Initiated by the French NSC, a social media community emerged where – due to language boundaries – Spain and France opened a separate group for all dealerships which had transferred the practice in order to exchange on problems and ideas. In Spain, the NSC used this platform also for so-called *retos*, i.e. competitions where practice-specific tasks were set by the coaches. Both French and Spanish NSC also used the community for asking all staff members at once which parts of the practice still can be improved and if they needed help or support for that from the part of the NSC.

Thus, as the transfer progressed and involved more and more countries, shared cognition in the shape of telling stories about successful transfers of the practice and the more experienced subsidiaries sharing learnings with the less experienced ones became more and more important.

This overview is an extract of contextual factors that emerged as being highly influential for the transfer of ARE, at least in the case of Spain but also, like it can be seen in this last chapter on shared cognition, on a global level.

## 7.1.2 Process: Institutionalization

As outlined before, the process of practice transfer that is of interest in the present case is conceptualized according to the process of insti-

tutionalization involving the dimensions of implementation, internalization and integration (Ahlvik/Björkman; Björkman/Lervik; Kostova 1999).

### 7.1.2.1 Implementation

The *implementation* of the practice, i.e. the extent to which the enacted practice resembles the one originally developed by the HQ, can be evaluated by analyzing various transfer reports (internal documents, implementation reports Spain, June 2018). Within these reports, the CC listed the different *original* elements of the practice and checked their enactment in the three dealerships. Drawing from these reports, from my observations, various informal conversations with all stakeholders and the interviews with all Spanish representatives, one can summarize that most of the bigger framework of the practice got implemented in all three dealerships: All of them assigned the three additional personnel roles, are thus complying with the original practice and also follow the broader steps of the new sales process. The coaches encouraged the teams to try out and test every single element: “We always have been strict in making them to try things out” (CC, NSC). At the same time they also affirmed that there is nothing wrong with rejecting things that have proven to be “more complicated” (C1, NSC). Thus, in the case of Spain, the implementation of the practice is reached.

### 7.1.2.2 Internalization

On the intersection with the dimension of *internalization*, this approach of trying things out resulted into rejecting few elements, adapting and/or accepting and valuing others. To try things out therefore was – as already indicated by Kostova (1999) and Björkman/Lervik (2007) – essential for moving from only behaving according to the rules of the practice to developing commitment to, satisfaction with and even ownership towards it. This can be seen from various interview statements – to cite just few of them:

“I think that [SM2, Zaragoza] had some doubts about the customer being in contact with too many roles but at the end, I think, he has seen that it’s working out.” (CC, NSC)

“The sales advisors had doubts about [one of the roles]. But now they have understood that thanks to that role they can communicate with the customer on another level.” (CC2, NSC)

“They tried out things and saw that it really worked and that not everything was as bad as they thought at the beginning but on the contrary helped!” (E5, Zaragoza)

“At the beginning I thought that the customer would be a problem. That the customer won’t accept [the new roles]. Now I’m convinced because I have seen that it isn’t a problem but on the contrary, they are very open to that and not hesitant at all to a thing that I found strange at the beginning.” (E1, Madrid)

That is, by testing the elements of the practice they generated commitment towards the practice in the sense that they accept it and see its value. The head of the dealership in Madrid even said in an informal conversation that he is fully convinced and would never return to the old practice. How closely related the notions of practice commitment and satisfaction are can be perfectly seen from this statement of SM1 from Madrid when he describes how well E2, the dealer’s change agent, developed within the practice transfer: “He has dedicated a lot of effort [...] He has fallen in love again with his brand, but above all he is satisfied because he personally feels good helping and assisting others” (SM1, Madrid). For a better understanding, it’s important to notice, that E2 changed from being a sales advisor to one of the newly introduced personnel roles. This is why according to his sales manager, it took him a lot of effort to implement the changes which came along with the practice (*practice commitment*). This change also made him fall in love again with the brand he’s working for and it makes him happy working with the practice because his new role meets his individual values (*practice satisfaction*). E2 confirms his leader’s observation: He was already cited in the previous section as he took over the leadership for the practice transfer at dealership level and said that he and E3 invested a lot of time and effort in implementing and developing the practice further. They also created parts of the sales process themselves which is a strong indi-

cator for psychological ownership (Pierce et al. 2001). E2 also states that he has started to be happy again at work:

“Since I have seen how ARE works, since I have met all of you and you have started to do the training and I’ve seen the results the ARE process has, I like going to work again. I’m changed, I’m happy here, very happy” (E2, Madrid)

Apart from that he’d never “return to the old process. It would take us much effort to go back!” (E2, Madrid). What was also fostered in Madrid from leadership side is that the employees take decisions themselves with regard to the practice. At various occasions in his interview, the sales manager (SM1, Madrid) mentions the importance of “empowerment” and relates the term to “take decisions” and “lead” in order to make it a “project of everyone”. According to Pierce et al. (2001), all that, i.e. controlling the practice by being involved in decision making and being autonomous, is contributing to developing ownership towards it.

A lot of other employees also describe the practice or project as “very nice” (E3, Madrid) and express their satisfaction because it meets their needs or values (E1, Madrid; E3, Madrid; E1, Bilbao; E2, Bilbao; E3, Bilbao; E5, Bilbao; E6, Bilbao; SM3, Bilbao). According to these statements the practice seems to be internalized in both Madrid and Bilbao although there is more convincing evidence for internalization in Madrid. From Zaragoza there are various comments from more than one person which lead to the assumption that internalization of the practice is not reached yet. One sales advisor, for example, complains about the amount of projects that are being implemented at the dealership which is why they cannot focus on their actual task of selling cars (E4, Zaragoza). Also, the CC observed that the team sometimes makes use of the new practice, sometimes not, although the idea of strategic organizational practices is both in theory (Kostova 1999) as in the present practical case to *replace* the old practice and become the new normal. Also, E7 (who also assumes leadership functions and does not form part of the sales team) states that she feels that the team once it is said to be fully implemented kind of *tick it off* and return again to the old practice. All that goes hand in hand with my own training observa-

tions where the active participation from the team was less and some of the team members always seemed a little bit annoyed investing another hour into a training session. A possible explanation could be the coach's attitude and way of conducting the training sessions: Both the project lead and the CC as well as myself perceive C2 as being rigid and tough in her communication and actions, sometimes not allowing other opinions than hers. In order to fully account for the coach's influence on the internalization of the practice another and closer look at the transfer capacity of the transfer coalition would be needed. Another factor in Zaragoza could be that the sales manager – although demonstrating commitment to and satisfaction with the practice – didn't take part in any training session. This could possibly be perceived by the team as if their leader doesn't attach much importance to the practice and the practice might stay the coach's or NSC's practice and won't become its own if the leader is not officially demonstrating his commitment.

For E9 (HQ-External), the role of the CC is central also for the internalization of the practice in the sense of making it one's own. She states:

„It's good to have someone who builds a good bridge to the culture, to the organization and who feels responsible for the topic. It was all about getting something started really fast that still was belonging to you very much, thus, the country didn't own it yet. The pilot countries volunteered as pilots but this gets lost very quickly if there isn't someone who displays a strong sense of ownership. Thus, the CC is a success factor [...] and massively important because otherwise it would evaporate.”

Also, on the level of the NSC, there was a need for making it their own immediately. The ARE project lead (NSC Spain), for instance, engaged in renaming of one of the roles and the practice' name as a whole before even starting the transfer itself because “there was the need to label it as ours. We wanted to internalize it.”

Thus, both on NSC and dealership level, the internalization of the practice took place to a large extent.

### 7.1.2.3 Integration

The last dimension of *integration* can also be found in the case of Spain, both in terms of recognizing its importance as well as in terms of concrete actions to link the new practice to existing ones and increasing its fit. CC, for example, highlights the importance of integration by describing how the practice can be sustained at the dealerships:

“Very often you hear the message that customer experience is very important but then on the level of remuneration this message doesn't have much impact on salaries for example [...]. That is, at the end all has to be in harmony. It's not about keeping a process alive, like if it was in hospital and is provided with artificial respiration but rather everything around it has to work as well.” (CC, NSC)

In practice, there are various processes that are affected by the new practices: For example, there is a performance measurement practice which evaluates how the sales process in the dealerships is executed. The Spanish NSC has adapted this practice because of the new sales process which was implied by ARE. Similarly, the customer satisfaction survey, another performance measurement practice, is also being adapted in order to account for the new ARE practice. Another example is a digital dealer management tool that is used by the dealerships in Spain and didn't really fit to the needs of the new practice. The tool is currently being adapted as well. Also, in Zaragoza and Madrid the marketing and quality departments are very actively involved in developing the practice further and collaboration was reinforced through the new practice. Apart from that the practice also had implications on the physical environment of the dealership. Madrid e.g. adapted its furnishings and floor plan. Another initiative started by the Spanish in order to keep the dealer teams motivated for the practice and avoid that they return to old behaviors are their so-called *retos*<sup>5</sup>: Via the aforementioned social media community, the Spanish ARE transfer responsible together with the coaches sets tasks every once in a while which are directly related to the practice. Each dealership team

5 In English: challenges



is asked to participate in this *reto*, the best three of them win a prize. All these initiatives show that especially on NSC level people take the practice seriously and is about to fully institutionalize it by interlocking it with other practices. Other examples for the practice' internalization is provided by the Dutch market: One pilot dealer already integrated the after sales department of the dealership into the training phase for the practice' implementation. The sales and after sales department, i.e. the workshop that typically forms part of a dealership next to the retail showroom, traditionally are separate units in most countries which – although forming part of one company and depending on each other – are not interacting much and rather operate in silos. This Dutch pilot dealer felt that customer experience needs to be an important part of both departments. Thus, by integrating the after sales department into the training, the dealer fostered their cooperation and extended the practice in terms of its customer experience focus on other practices and parts of the dealership. This kind of integration became mandatory for each new Dutch dealer which declared to rollout the practice. Also, the new transfer responsible of the Dutch importer announced in the last meeting I attended in January 2020 that the importer itself will go through an ARE training stating that: “When dealers need to be customer centric, the [the importer] shall be the same for dealers when they need something from us.”

Thus – to sum the chapter on the institutionalization of the practice up – when wanting to assign a pattern of adoption to the way how the Spanish dealership implemented the practice, *adoption* (Edwards/Molz 2014), *active adoption* (Kostova/Roth 2002) or *transfer* (Lervik/Lunnan 2004) are best describing it: Without taking a specific look at modifications to the practice yet, in the three Spanish dealerships it got implemented, internalized to a large extent and integrated with other practices.

### 7.1.3 Content: Outcomes and Recontextualization

This last section of analysis of research phase 1 will now take a look at how the recipient units made sense of the practice as a whole or of single elements of it and which new meanings were attached to them in

order to increase their fit with each respective context (Brannen 2004). As Fortwengel (2017) describes, internal fit can be understood as both implementing and internalizing the practice while always bearing the opportunity to adapt the practice and/or the organizational culture in order to reach the fit. There are three interviewees who directly link internalization in the sense of “making it their own” with adapting parts of the practice: One of the coaches states: “They have internalized the project as theirs and by making it their own, I think, they feel free to make proposals of how to do things” (C1, NSC). That is, from his opinion the internalization of the practice encourages creativity and adaptations. The other person, E6 from Bilbao, answered the question whether there have been elements of the practice that haven’t made sense to him, by:

“No, I think we finally have made it our own by adapting it on the basis of how you presented it to us. [...] Adapted it to the way we are, to the way of working, without radical changes but just in order make it more natural and to feel more comfortable with it.” (E6, Bilbao)

That is, for him, adapting the practice to their needs means making it their own. The same applies to the explanation of the project lead when answering the question, why they translated the names of the roles to Spanish, as the original names were in English:

“That was funny, because we renamed it before we even started. Because there was a need to say, now, we mark it as ours now. Now we also want to internalize it and when we want to internalize it, in Spain, it has to be Spanish, because they all don’t speak English.” (Project lead, NSC)

Adaptation in general is understood by the dealership interviewees as the need to make things „natural“, „comfortable“, „more logical“, „normal“ as opposed to “uncomfortable“, “absurd“, “strange“, “unnatural” or “difficult”. E6 from Bilbao puts it like follows: “We cannot move around here like robots! It has to be adapted to our way of working, our way of being as well.” That is, on the one hand, the need to reach the fit between the new practice and their organizational culture, needs and norms is highlighted across all interviewees, also in order to develop ownership

towards it. On the other hand, both coaches and employees relate their adaptations to the fact that they have been allowed and trusted to do so by both coaches and the HQ.

Apart from the need for adaptation in general, there are several examples, where recontextualization took place.

One example is the understanding of the practice as a whole and the meanings attached to it. Two important and interrelated, shared meanings emerged: First, the majority of interviewees indicate that for them ARE means *making the customer feel special and different* than at other places. Especially the later meaning is also shared by the original, German understanding of the practice: One of the goals of the practice is to differentiate the dealers from their competitors by offering a better and brand-specific customer experience. The second meaning, however, was not implied in the original, German understanding of the practice and newly emerged from the Spanish context: For the big majority of interviewees, ARE means *making the customer feel like being home*. During my dealership visits, I frequently heard the term “arropado” when people talked about how the customer should feel like, accompanied with the gesture of rubbing the palms on the opposing upper arms. Translated to English it means “cocooned” which probably is the closest translation – compared to German, where it would be “verpackt”, “gerahmt” (linguee.com) or “beschützt” (pons.com) or to French where it would be “couverte” (linguee.com). The etymological roots of the word lie in “ropa” for “clothes”, while “arropar” can be translated with “putting on clothes”. In one of the interviews the term emerged another time and I took the opportunity to ask for an explanation: “It is like how you feel in the moment you come home, open the door and your little daughter is rushing into your arms and gives you a kiss and a hug. That’s how it is. That you don’t feel alone” (E1, Bilbao). That is, the Spanish interviewees understood ARE as the customer feeling “arropado” and like being home. In the findings presentation I gave to the Spanish project lead she wasn’t surprised at all about this meaning and stated that this goes hand in hand with the Spanish emphasis on family and search for belongingness. For her, the teams’ emphasis on making the customer feel like being home is very Spanish in that the teams want to be another kind of family for and with their customers.

This recontextualized meaning of the practice as a whole is strongly related to the meaning which is attached to the new personnel model: In the original German reasoning, the new personnel model was meant to increase efficiency by separating tasks that formerly were accomplished by just one person, namely the sales advisor. Now, three more personnel roles are added and are supposed to form a team together with the sales advisor, with at least three of them interacting with the customer. While in Germany people were critical about giving up the principle of “one face to the customer”, for the Spanish teams, having at least three persons interacting with the customer is a means of making the customer even more feeling like home and “arropado”: “That the customer now knows more people than just me is brilliant! That someone’s coming and feels like home. That he has people to turn to. That’s just great” (E2, Bilbao). E3 from Zaragoza describes it in a similar way: “They have more contact persons now, not just one [...] and it’s more their home because they know more people, they feel more comfortable.” Others point out, that knowing more people avoids that the customer feels “lonely” (E4, Zaragoza) or “lost” (E2, Zaragoza; E5, Zaragoza) but instead makes them feel “more attended and accompanied” (SM2, Zaragoza; E2, Madrid) and feels “part of all that” (E1, Madrid). This again goes well in line with the Spaniards’ constant search for a family, also outside their actual, related family. By approaching the customer with more than just one person the dealer teams are better able to build new families with their customers, i.e. making them feel “arropado” and like being home. Thinking of d’Iribarne’s (2009) conceptualization of national culture as being both stable in the sense of people sharing a specific concern or fear and dynamic in the sense of individuals, groups or organizations making sense of situations in light of this general concern or fear very differently, the Spanish main fear might be being alone or without any family to turn to. The practice of ARE, in this sense, allows to ward this fear off and that’s how they make sense of and attribute meaning to it.

Another example for a recontextualized meaning is the meaning of storytelling: storytelling is a concept that is highly used in retail businesses when it comes to selling things as it is a central part of human communication (Gilliam/Zablah 2013). The German original proposed

telling stories about the car brand's history, the architecture of the dealership or the design of the car in order to communicate with customers on a more experience-oriented level. I was able to observe a lot of role plays during the training sessions and recognized that when the coaches gave feedback after these roles plays they also highlighted the storytelling used by the actors – but there have no stories been told about the brand's history, the design or technology at all.

I remember myself wondering when I heard coaches giving the feedback that the storytelling was good. At first, I was thinking that probably my Spanish is not that good as I thought and that, because of that, I have just missed the story! But soon, I understood that the understanding of a good story to be told during a conversation with a customer is a wholly different one.

Rather, the coaches appreciated the storytelling about the person's own experience or stories they experienced with other customers. Storytelling was understood as being much more human and personal. The CC explains the need and reason for adapting the concept of storytelling as follows:

“I think storytelling is good and it has to be done, but for Spain it has to be adapted and it has to be made very very natural. Super natural! For example, to tell a story about the dealership's architecture is not natural. For the team it feels strange doing that and the customer will think: ‘What's that?’ It has to touch more on day to day situations of real customers or dealership-specific things or things the sales advisor has personally experienced.” (CC, NSC)

E7 from Bilbao describes the original, German way of storytelling as “absurd” and even “counterproductive”, while SM1 and E3 from Madrid point out that their stories are related to real persons:

“We made sure that everything has a storytelling: the *palmera*<sup>6</sup> has a personal storytelling: It’s a business which is fraternized with us and we buy from them for years because it’s a business from here. The same accounts for the wine<sup>7</sup>: It is produced by one of our customers and the labels are designed by another customer. And that’s how everything has a story. That, every time we tell the customer: ‘This is for you from me’, we can tell that this is possible because of customers like you! This way we are creating a kind of club effect, a community effect which is what we are searching for.” (SM1, Madrid)

The German understanding of a good story, for them, is just not personal, not human enough. And once again, the family plays an important role here: The fact that SM1 uses the word fraternized or hermanado in the Spanish original gives the example stories he names a kind of “family-touch”: By using that word, he implicitly views the business which produces the palmeras as a brother business to his own. He even summarizes the reason why everything needs to have this personal storytelling by stating that this way, a “community effect” is created – which everyone strives for. Thus, looking at all these examples for recontextualized meanings, the notion of family, connectedness and belongingness is omnipresent in the Spanish sense-making of the practice. This goes well in line with the Spanish Kulturstandards proposed by Rehebin et al. (2009), where family orientation and also the importance of social relationships at work are seen to be characteristic for the Spanish culture. However, the way how this family and social relationship orientation is giving birth to new meanings is specific for this particular practice transfer context. That is, in this sense, again, the family orientation and being alone and without a group to belong to might be a general concern of Spanish society, but the way of how to satisfy this general need is specifically constructed for this particular case (d’Iribarne 2009).

6 A typical pastry from the Madrid region; This is an example for the so-called unsolicited gift which is an important part of the new ARE sales process

7 Here, he refers to another important element of the ARE sales process: the gift the customer gets when he or she picks up the new car

Actually, I specifically started to recognize that the notion of family is hovering over everything else only since the Spanish project lead described the Spanish pursuit of “building a family everywhere” in my results presentation to her. At that point in time, I already had finalized the analysis of the Spanish data from research phase 1. However, the fact that the Spanish transfer responsible gave me a further explanation of why the team orientation of the practice fits so well to the Spanish culture, made me starting to see the recontextualized meanings I already had described differently and provided me with a much deeper understanding for them. It seems like this short explanation was the missing piece in the puzzle for the full picture of the main meaning underlying the Spanish recontextualization of the practice.

#### 7.1.4 Summary and Discussion

After carefully analyzing the three categories *context*, *institutionalization (process)* and *outcomes/recontextualization (content)*, a holistic picture of the practice transfer under study can be drawn. Regarding its context, it has been shown that several organizational and individual level factors have influenced the present case of practice transfer in a positive way. First, the HQ’s transfer strategy has changed over the course of the transfer, originating from a rather ethnocentric approach moving to granting flexibility and aiming for co-creation. Second, the practice fell on fertile soil in the three Spanish dealerships, as it fit well to employees’ needs in their currently fast-changing and complexity-increasing industry, to their respective organizational cultures in terms of their openness to learn and willingness to try out and change things and the Spanish human and family orientation. Third, the supporting, close and trustworthy yet at some point also hierarchical relationship between the actors from the HQ, the subsidiary and the dealerships was found to impact the transfer positively as well as fourth, a capable, trusted and engaged transfer coalition involving myself, the subsidiary representatives, the dealer management and team. Fifth, on a more global and not specifically Spanish level, shared cognition in the sense

of sharing stories about successful implementations, challenges and learnings was found to be an important driver of practice transfer and can even be considered a “currency” for marketing the practice both internally within the HQ and externally in the communication with other subsidiaries. Apart from that, the first research phase was able to retrace the *process of institutionalization* and showed, that the internalization of the practice was highly influenced by first, the coaches’ encouragement to try out things like they were meant to be by the original practice – thus the practice’ implementation – and second, the possibility to create or adapt elements of the practice and by doing that making it more natural and develop ownership towards it. Differences in the level of internalization were presented, where the Madrid dealership seemed to have internalized the practice the most. Actions towards the integration of the practice both on NSC as on dealership level were presented which involved the adaptation of relating practices (e.g. the performance measurement practices), the establishment of entirely new practices (the retos on the social media platform) and the extension of the practice on additional organizational units (e.g. Dutch after sales departments) or layers (e.g. Dutch importer). In the section *outcomes and recontextualization of the practice’ content*, the importance of creating a fit was highlighted by the majority of the interviewees and three examples for recontextualized meanings of central characteristics of the practice were given. These newly attached meanings all have their roots in the family- and social-relationships-oriented Spanish culture (Rehbein et al. 2009).

While the interrelationships between the three categories context, content and process already become apparent at one or another occasion during the analysis, they shall now be made explicit even more: As previously indicated there is a clear relationship between the HQ’s strategic orientation and the recontextualization of the practice: On the one hand, the possibility to adapt things was appreciated and made use of, while on the other hand, the HQ learned in the course of the transfer that it is simply necessary to grant flexibility and freedom for adaptations. What’s interesting to note here is that the change in the HQ’s strategy was not planned or carefully thought off, but rather forced at the beginning because it was realized that the transfer cannot be suc-



successful if there is no flexibility (E1, HQ). This is a clear example of single-loop learning, where strategies and – following on that – actions are adapted based on the experiences made, without yet having an effect on the organization's mindset (Argyris/Schön 1979; Bartel-Radic 2013). However, after flexibility was granted and a backflow of recontextualized meanings and new ideas from recipient units emerged, it was found to not only be necessary, but also good and beneficial to be flexible (E2, HQ; E3, HQ). It is even intended to foster exchange activities in order to learn from each other (E1, HQ; E3, HQ). I myself, for instance, used the Spanish example of a recontextualized meaning of *it's good to have multiple contact persons because it makes the customer feel home* in various discussions with both Germans and representatives from other countries when it was argued that it's not good to have too many persons interacting with one and the same customer. Similarly, the Spanish understanding of storytelling as being more personal has become more and more apparent in the HQ's discussions about the practice with other countries. This would now constitute the double-loop learning described by Argyris and Schön (1979) and – more specifically for intercultural learning situations – by Bartel-Radic (2013): The previously “forced” adaptation of the HQ's transfer strategy changed into actively searching for a diversity in terms of the practice' implementation. Thus, the organizational mental mode and culture became more ethnorelativistic (Bartel-Radic 2013, p. 242). At the same time, it was argued by HQ staff that in spite of all the flexibility granted, a red thread or essence of the practice has to be maintained. What has been frequently discussed at the HQ is that the broader framework of the practice, i.e. the *headlines* of the personnel model and the new sales process should be set as a standard while the detailed design of the personnel roles or steps of the sales process and their concrete content is adaptable – which was then even seen as sometimes too loose: A little bit more standardization would have been welcomed, like the statement from one sales manager and one employee has shown (SM1, Madrid; E1, Madrid).

At the same time, the flexibility which was leveraged by the recipient units resulted into the internalization of the practice: Adapting the practice to their “way of being” (E7, Zaragoza), their “way of working” (E6, Bilbao) and the “dealership's personality” (E2, Madrid) made it

more “natural”, “normal” and let them feel “more comfortable”, which probably made it easier to develop a positive affective attitude towards it (Kostova 1999). Additionally, adapting it also meant for them investing time and effort, “making it our own” (E6, Bilbao; SM1, Madrid; C1, NSC) which is a strong indicator for psychological ownership (Pierce et al. 2001). The Spanish project lead even states that the possibility to create things within the practice let the people in the dealerships “flourish” and summarizes:

„They recognized that they aren't like robots who just do whatever they are told to do, but rather are allowed to openly think and create their own sales process while acknowledging certain standards. And in doing so they gained autonomy and independence which in turn gives their profession a lot more dignity.“ (Project lead, NSC)

That the practice was welcomed and found to be good by the dealerships triggered its integration with existing practices respectively fostered the adaptation of existing practices in order to increase their fit or even extend it to other organizational units or establish entirely new practices. That is, there was effort undertaken to increase the practice' internal fit (Ahlvik/Björkman 2015; Fortwengel 2017) which shows that the practice isn't merely ritualistically adopted to please the HQ (Björkman/Lervik 2007) but is rather found to be good and beneficial. Shortly after the interviews were conducted with the dealership teams the Spanish NSC decided to transfer the practice also to all other dealerships in Spain – which again shows how successful the NSC considered the practice transfer to the first three dealerships.

The first research phase revealed the great variety of factors and dynamics involved in international practice transfer of one specific transfer case as well as the interrelationships of these factors: The institutionalization of the practice in the Spanish case was possible because of the supportive nature of contextual factors such as the changing HQ transfer strategy, the nature of relationships between stakeholders and the agency of individual actors and also because of the practice' recontextualization and adaptation to make it fit even more to prevailing values – which in turn was found to be positive by the HQ and triggered its

change in strategy: In other words, a cycle of mutually enforcing factors emerged which is visualized in figure 31. It only differs from Pettigrew's (1978) framework of studying organizational change in its geometric shape as a cycle might better account for the dynamic, mutual relationships between the three perspectives than a triangle.

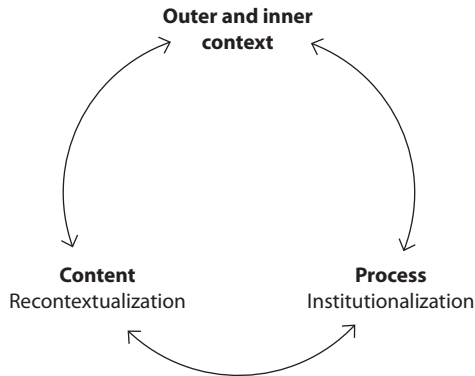


Figure 29 Self-enforcing cycle of context, content and process

The evolution or development of the organizational HQ sub-unit from a rather ethnocentric to a more and more ethnorelativistic and geocentric attitude within its operations is a central dynamic that I was able to detect. I found this development so interesting that it shall now be the main focus of my second research phase. I didn't aim at that during my investigations in the first research phase. The strategic orientation of the HQ sub-unit was just another factor, I was keeping in mind and investigating in. The fact that there was actually something exciting happening triggered the emergence of the second field of research which shall now be displayed in the following.

## 7.2 Research Phase 2: Intercultural Organizational Development

“Getting hold of the difficulty *deep down* is what is hard. Because it is grasped near the surface it simply remains the difficulty it was. It has to be pulled out by the roots; and that involves our beginning to think in a

new way. The change is as decisive as, for example, that from the alchemical to the chemical way of thinking. The new way of thinking is what is so hard to establish. Once the new way of thinking has been established, the old problems vanish; indeed, they become hard to recapture. For they go with our way of expressing ourselves and, if we clothe ourselves in a new form of expression, the old problems are discarded along with the old garment.” (Ludwig Wittgenstein, *Vermischte Bemerkungen*)

Wittgenstein summarizes what began to happen in the HQ sub-unit I was working with: a change in attitudes and new ways of thinking, leading to a cultural change. Central for the following analysis of research phase 2 is what emerged as a very powerful factor in research phase 1: The change in the HQ’s transfer strategy. As described in detail in 6.5.3, the shift in research focus was primarily due to the fact that there was this change in the HQ’s approach becoming visible. Thus, in Wittgenstein’s words, a “new way of thinking” emerged. At that point in time, being in my first research phase, I probably was not the very first trigger for that, but I was taking note of that change as a researcher and, once I was able to grasp and name it, I started to support it even more, trying to further establish and institutionalize this new, ethnorelativistic way of thinking. Before starting to review the development the sub-unit went through along three broader time periods, one statement of E1 (HQ) shall be displayed which serves well as a summary of the difficulty of changing deeply held attitudes as it is described by Wittgenstein:

“We just work in ‘tick in the box’, ‘training module 3 is done’ or ‘concept is implemented’. When we share what is happening in Portugal or Sweden, people very often say: ‘Well, but that’s not ARE!’ That’s right, it isn’t ARE! But when you have a careful look at the name of the project, it simply means that we want to create a brand experience in retail. That is, actually, you may not talk about ARE or non-ARE. That’s again a typical German thing of saying: ‘You’ve gone through that training, you may now name yourself this and that.’ Basically, an ARE experience is offered everywhere. Saying, ‘that’s the good ones, they are doing it the way we think is the best and the other ones just don’t understand the business and won’t

survive, drastically spoken – that’s very dangerous. That is, we just have two options: Either we open the door for flexibility and cooperation in its real sense or we close it and just complete the ongoing transfers and that’s when our impact is over. [...] The question is, whether we can fight for this flexibility approach, that people who think differently adopt it or at least make them reflect on it.” (E1, HQ)

This statement is perfectly introducing the second part of analysis for two reasons: First, what E1 refers to here are the multiple cultures which are existing within the HQ and which – when looking at the transfer of ARE – are standing in conflict with each other. What he describes is the sub-unit’s culture of approaching the transfer with the flexibility of granting different interpretations of the practice ARE without judging these interpretations – while the broader HQ or even German culture is standing in sharp contrast to this approach. These conflicting cultures will emerge as a major factor within the organizational development of the sub-unit and even become an obstacle for its further development. Second and closely related to the first point, the last sentence refers to the difficulty of extending the development, making the mindset that has emerged within the sub-unit accessible to a broader range of organizational stakeholders in order to dissolve this conflict. Using an action research language, this would constitute a third-person inquiry (Reason/Bradbury 2008), targeted at pulling former thinking “out by the roots” in order to begin “to think in a new way”. These two points brought up by E1, i.e. conflicting cultural realities and the promotion and extension of one’s own development will be recurring themes within the subsequent analysis.

In the following chapters, I will describe this development and my approach to fostering and extending it along the temporal bracketing I undertook in chapter 6.5.4 and the respective events composed of the reflections I guided and the interventions I conducted. The resulting structure of the second research phase analysis is the following (for a visualization of the structure please refer to figure 27): Within the first phase, the *learning and reflection* phase, Reflections part I will refer to a re-analysis of the interviews I conducted with the sub-unit employees in the run of research phase 1 as well as some insights from two so-called

lessons learned workshops I took part in in order to show what has happened so far in terms of the department's intercultural organizational development without my active involvement as an action researcher. Intervention I simultaneously constitutes reflections part II in the form of a departmental workshop where the department's past, present and future intercultural interactions are examined. The second phase, the *consolidation and internationalization* phase, aims at extending the department's development to further HQ and – more importantly – subsidiary stakeholders while simultaneously institutionalizing the sub-unit's development further. Interventions II and III form part of this phase, although intervention III already passes into the last phase, i.e. the *turnaround* phase. Reflections part III, then, outlines the final step of my action research endeavor for which I conducted short reflective interviews with the sub-unit employees in order to reflect on Intervention III as well as on the status of the department's intercultural OD as a whole. This is part of the last *turnaround* phase.

Thus, chapter 7.2 starts analysis at the point in time where HQ sub-unit team members started to reflect on the experiences they gained and are still continuing to gain during the practice transfer as well as the resulting individual and organizational learning. It further touches on the general intercultural development from ethnocentrism and ethnorelativism, single- and double-loop learnings and my impact as an action researcher. The following figure again shows which parts of the conceptual framework chapter 6.2 will consider.

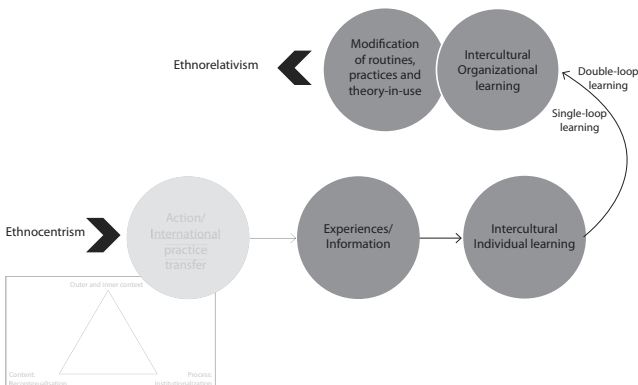


Figure 30 Extract of the conceptual framework chapter 7.2 touches on

## 7.2.1 Learning and reflection

This chapter primarily contains reflections made on their own development, changes and learnings in the interviews I conducted with the sub-unit ARE transfer team members in November and December 2018, i.e. in research phase 1. Additionally, some insights from two lessons learned workshops will be included.

### 7.2.1.1 Reflections part I

#### **Individual and collective learning**

As already shown in chapter 7.1.1.1, the HQ transfer strategy changed from a rather one-size-fits-all approach, thinking that the original practice is the best to an approach that granted a lot more flexibility and room for local adaptation. For research phase 2, I reviewed the first interviews I conducted with the team members who were actively involved in the transfer and searched for statements which are pointing to or describing that change. The first thing I came across while re-analyzing the interviews through the lens of intercultural organizational development was that the interviewees – without me having asked for it – reflected on what they *learned* during that transfer, what surprised them and which assumptions were turned around. The following tables list a number of statements about the learnings they have made.

| Inter-viewee | Statement Number | Statements about learning  |
|--------------|------------------|--|
| E1 (HQ)      | 1                | <p>"Over time, I <b>learned</b> how flexible we need to be and that we cannot transfer ARE including our way of implementing the concept which is again born from applying our cultural lens into the world one-to-one. And that's why in my opinion, when we think of it as a timeline, the importance of flexibility or the level of flexibility that we need to apply has increased. One and a half years ago, I thought that we could change more things in a way that is the right one from our point of view and in an approach that we have chosen. In the meantime, I think that we cannot do that anymore. Or, more specifically, that we have never been able to do it but just have thought that we could."</p>   |
|              | 2                | <p>"During a business trip to the USA, for instance, I <b>understood</b> that we had our concept with us as, let's say, our backpack and went meeting them, misleadingly that we can launch a concept perfectly at US american dealers because the concept was developed by an american agency. We took this backpack, spreaded its content and said: That's our picknick. Like that! But we didn't really look at the current situation in the markets, what their needs and demands are. We merely did that on the surface. For instance, the USA said, they want to reduce staff turnover [...] and they want to bring customer experience to the next level. These are statements that fit perfectly with our cultural grid and our view on the concept. [...] In the end, we got run over by the turnover! That is, we adopted the market perspective only on a surface level!"</p> |
|              | 3                | <p>"We didn't know how it will go and just tried it out. And that's difficult and can only be understood in retrospective that things had to go wrong in order to do them better now. That is, as soon as we <b>understand</b> that we need to emphasize the topic of 'why are we doing this' more because it didn't go well in one dealership from the pilot phase, we know that we won't make the same mistake again. In hindsight, every mistake we made during the pilot phase was really valuable and good to happen even if in that particular situation I could have thrown myself out of the window. But nothing happens without a reason, that's really fascinating."</p>   |
|              | 4                | <p>"We <b>got to know</b> the limits of our field of action. to be honest, I haven't expected that our field of action is that limited. I <b>understood</b> that if the Japanese don't want that concept for whatever reason we won't even understand or they won't even have to explain to us, they just won't implement it. No matter if we pay money for it or not. I <b>wasn't aware</b> of that before."</p>  |
|              | 5                | <p>"Our management <b>understood</b> – like we did – where the limits of a consistent brand identity are. In my opinion we have been trying to reach consistency through behaviour way too much even though behavioural consistency culturally, isn't desirable. For instance, one could argue for months about what the ideal way of greeting a customer is. Or one could simply accept that that's probably different and that a customer in the US might perceive the welcome as bad or unsettling if it were consistently European. [...] I think, we should talk more about what we want to reach in terms of output-oriented consistency, that is, a great experience [...]. We defined the <i>how way</i> too much at the beginning."</p>   |

Figure 31 Interview statements about learnings made during the practice transfer



| Interviewee | Statement Number | Statements about learning  |
|-------------|------------------|--|
| E2 (HQ)     | 1                | "In the past, we also piloted a training concept, but we chose a country where we thought that it'll work out well. This way, we lied to ourselves a little bit because we planned for that it will work out. But there, we had different countries and also different dealerships per country across different cultures. This way, we experienced ups and downs which <b>made us learn</b> and made us work more closely together with them. It made us attune to them, too. [...] Sometimes we also created concepts and didn't pilot them because we just thought, that's fine, they have to do it that way, that's how we want it to be. [...] We had a diverse mixture. And that was unique and new." |
|             | 2                | "The project made me <b>learn</b> to be a little more flexible and pragmatic. And to sometimes not think through everything in the smallest detail, assess all eventualities and 'what will we do if this and that happens'; but to just do it. Even if it's not a 100% thought through. Thought through from our point of view! Because in the end, it nevertheless helps! For instance, the recruiting tools we provided the Spanish with still didn't have the brand's corporate identity design which upset me a little bit. But the Spanish did recruit people, good people! So, I learned to be a little more pragmatic, flexible in some regards."  |
| E3 (HQ)     | 1                | "We <b>recognized</b> that everyone is overwhelmed when we say 'do it like you want', same as when we are too restrictive, because they cannot think of how to deal with it. They have their organizations in their minds, they think in their categories. See, for instance, the US, where we <b>recognized</b> during the pilot that [...] their business works completely different. That's happening right now, that when we now talk with the markets we ask for their framework, for their way of doing business."   |
|             | 2                | "Right now, we are <b>learning</b> that each country and each dealership has a different level of maturity, a different starting point. We also learn to trust, to let things develop and that things just have to develop. That is, you may agree 100% with the NSC and then, it might be good to first start with a small seed and let the little tree grow whereas elsewhere you already can plant a two year old tree. And all that is happening in parallel! And I think that we have <b>learned</b> that during the pilot phase and also during the rollout now."  |
| M1(HQ)      | 1                | "First, we have <b>learned</b> that not all elements of the practice are useful in the same way. There are elements from which we thought they would be our best invention ever but turned out to be really difficult to implement. [...] We also <b>learned</b> that we need to grant more freedom than we thought at the beginning. The unsolicited gift, for instance, where we recognized that a central version is no option and look at all the great examples from all over the world now. We also thought at the beginning what we would need [the fourth role]. We know now, no, that's optional, because the world is just so colorful. [...] We just <b>learned</b> a lot."                     |

Figure 32 Interview statements about learnings made during the practice transfer (continued)

The reflections E1 makes and the learnings he took away can be summed up as follows: First, while transferring the practice, he got to know the different local circumstances and cultures better and therefore understood that the implementation of the same, central version of the practice everywhere is just not possible. Thus, the mere exposure to intercultural situations and interactions made him reflect on them, learn and, as a result, increase his individual ethno relativism (Bartel-Radic 2006). Similarly, the learnings expressed by E3 and M1 relate to the encountered diversity during the transfer, their realization that not every subsidiary can be treated the same way and that it's important to get to know more about the subsidiary's framework. Second, E1 highlights that "things had to go wrong in order to do them better now" – he is thus pointing to the value of the experience of failure for the sake of learning (Argote 2013). A third, important learning he is taking away is that the department's power in relation to subsidiaries is rather limited and that a transfer cannot even be promoted by paying money for it, for instance. The notion of power will emerge in other, subsequent reflections as well. And fourth, in statement one, E1 reflects on the development in relation to time which additionally gives an important indication of the procedural, long-term character of the intercultural OD (French/Bell 1994; Gairing 2017) and the fact that experiences had to be made in order for the development to happen. While E1, E3 and M1 reflect on learnings they took away primarily in relation to international subsidiaries, E2 is more focused on contrasting the current practice transfer with the past way of working within the sub-unit but also in relation to his own, individual working style. From this first review of the learnings expressed, one might reason, first, that these learnings resulted into an adaptation of the transfer strategy, thus, single-loop learning (Bartel-Radic 2013). However, the statement made by M1 also gives an indication for double-loop learning, i.e. a change in the mental mode, as he refers to "all the great examples" that are emerging in a "colorful" world thanks to the change in transfer strategy. He is thus expressing positive emotions towards the diversity of approaches and implementations of the practice.

That learning was able to happen certainly lies in the different personalities involved in the transfer and their individual intercultural competence. For instance, M1 (HQ) summarizes:

„Having the right people on board is the most important thing. Look at yourself or [E2] or whoever you take from the team, I don't think that there is anybody who would say 'I tell you now how the business works.' No, everybody has the necessary appreciation of the other culture and the effort the other side has been making for years and decades. That's for me the basis of everything. There is this old saying of 'people have two ears but only one mouth', a subtle hint of the need to above all listen carefully. That's what our team is able to do. And that's the condition for developing trust.”

It is important to note here, that I conducted the interviews at a time where the first practice transfers already took place, the first experiences were made and after we went through our collective lessons learned workshops. As is shown in figure 33 and 34 the flexibility and openness for local versions *emerged* while the first transfers where going on. M1 (HQ) puts it like it has always been there and yes, for sure, the involved people might have a rather open personality which helped them wanting to be open even more and made them see the benefits even faster.

E3 (HQ) is a very central person in the sub-units organizational learning and development process. In her interview, she describes herself as a “subversive change manager” and as someone who tries to bridge “the old and the new world” of training and qualification. For her, “lessons learned are incredibly important”, that is, “bringing together various stakeholders for a retrospective and co-create”.

When I reflect now on the interview I conducted with E3, her statement about the old and the new world of qualification influenced my further research approach a lot. She was the first one who explicitly named it that way and I as a flexible, change-oriented and pattern-breaking person happily adopted this dichotomy. Later, in one of my last presentations in the doctoral colloquium when I presented the first findings from research phase 2 and also used this

dichotomy of old and new, I was asked whether this could be a bias from my part, that a shift into something new is how I want it to be, and that I therefore was blind on my “old” eye. As will become apparent in the subsequent chapters, this is not the case. At first, perhaps, I was excited about this statement, really wanting to find more evidence for this shift from old to new in order to push into that direction even more. I of course promoted this change as an action researcher. But I haven’t silenced the “old” voices which have been there nor have I closed my eyes in front of other directions and tendencies.

In addition, M1, E2 and E3 as well as E9 and E10 all have a lot of experience in working with international markets. M1 (HQ) states that the international working experiences “have a lot of influence! You have already tried out and experienced a lot of things. If you are a good observer and enjoy the diversity of cultures you are able to find ways that will work out from the outset.” Similarly, E2 (HQ) expresses that his long international working experience has made him “learn and see that each country is different and that you just cannot dictate things centrally.” He additionally tells of another transfer project, he has been working on for years already and which made him be in contact with all kinds of regions in the world and got to know different working styles. E3 (HQ) terms her international working experience as “enriching”. E1 (HQ) is the only one who has no international working experience. Perhaps, that’s why he is the one who describes the most learnings among the team members. Also, three other transfer team members of the sub-unit whom I haven’t interviewed at that point in time because they either were about to leave the sub-unit or just started to engage in the transfer are experienced in working on an international level. Thus, their individual intercultural competence – however high it is – might have facilitated their individual learning.

However, the experiences made now in this particular transfer are a lot different to the ones they all have made before. E2 (HQ), for instance, states: “It’s a project where you collaborate closely across all levels. That is, from the HQ to the NSC until the dealership. And that’s for me the biggest added value because that’s rare. Normally, it ends at the NSC.”

What E2 expresses here is, in my point of view, essential for the team's learning process: The observation of how the practice actually translates into dealership practice is what hasn't been usual before. Thus, the impact of decisions taken on a central level were directly observable for them and thus contributed to the learning process (Senge 1990). And here's probably where my action research intervention implicitly started during research phase 1: My research from the first research phase basically informed my practitioner colleagues in detail about what was going on during the transfer, at least in Spain. That is, by engaging in researching on the transfer to Spain, by being present at the Spanish dealers various times – more often than my colleagues could have ever been –, by sharing my observations, findings and stories, by also marketing the Spanish way of seeing and implementing elements of the practice, I was able to enrich the learnings made by my colleagues even more by providing a direct observation line which otherwise wouldn't have been possible that way. E3 (HQ) shared a thought relating to that in her interview:

“I asked myself to what extent you are an important factor for implementation, as you are on site in the pilot dealership. [...] I experience you as someone who is very identified with the dealer teams, your enthusiasm in sharing experiences and successes of the dealer teams with us, so, you are very engaged in ambitiously spreading this spirit. And I was wondering [...] to what extent you shaped the system by investigating it.”

E3 reflects on my role as a researcher and tries to evaluate its influence primarily on the dealers, but also on the HQ sub-unit. She further hypothesizes that the importance demonstrated by sending me as a researcher to investigate the functioning of the practice in the dealerships certainly had a positive influence on the success of the transfer in Spain. I cannot deny that. In addition, I'm convinced that my sharing of the experiences and successes from Spain, as was indicated by E3, was beneficial for the increasing ethnorelativism of the team: During the whole transfer pilot phase, the team met every two weeks for an update meeting. One fixed topic of this meeting's agenda was an update from all markets provided by the respective market responsible.

Among them, I usually was the one who was able to tell the most – simply because I have been investigating the transfer to Spain and therefore gathered a lot of information. And yes, what E3 (HQ) describes as “ambitiously spreading this spirit” is an appropriate account for how I shared my experiences and the information gained during my visits. I got to know the dealer teams very well, also because they always have been very openly sharing their thoughts and stories, which is why I was able to, for instance, not just report which elements of the practice they reinvented or adopted but also how and with how much enthusiasm they did that. I remember one situation really well, where I entered one of the three dealers and the team immediately gathered around me, impatiently waiting for starting to show me with great enthusiasm what they have developed since the last time I visited them. Back at the HQ, I transferred that *spirit*, this enthusiasm in my update reports.

Apart from the individual reflections made in the interviews I conducted, collective reflections took place in the framework of official lessons learned workshops. These workshops provided space for collective reflection how it is rather rare in big organizations (Roth/Bradbury 2008). It further contributed to the collection, integration and interpreting information, i.e. the first three steps of the learning cycle proposed by Dixon (2019). The two lessons learned workshops were initiated by E3 (HQ) and the Swiss agency which supported the development of the training concept for the practice’ transfer. The workshops took place in 2018, that is, during my research phase 1. I therefore merely participated as a learner and in order to share my learnings from the practice transfer to Spain instead of participating in the design of this intervention. Both workshops were carried out with international participants and took place with the clear aim to learn from each other and for other countries which might transfer the practice in the future. One might see the tendency of engaging in the action research practice of *learning history* here as it’s all about capturing the learnings made by one team and transferring this newly gained knowledge to other groups within the organization (Roth/Bradbury 2008).

For the first one in August 2018 the French, German and Spanish transfer responsible were invited to participate in order to share their main successes and challenges regarding the transfer of the practice as

a whole. The second one took place in October 2018 and involved the presence of the Spanish and Dutch CC in order to gain more insights specifically regarding the training as the main mean of practice transfer. These workshops, therefore, are clear signs for the valorization of culturally different perspectives on a certain topic and show that an integration of these perspectives for the sake of continuous improvement is actively sought for by the department. A very tangible result of the second workshop are 27 short video statements of both the CCs and sub-unit team members about specific learnings that were gained from the first ARE transfers. These videos were uploaded to an online exchange platform where all participating countries had access to. Just like already indicated above, this way of capturing and spreading learnings via videos is one example for a *learning history* (Roth/Bradbury 2008). Both the international, collective reflection on learnings, challenges and successes as well as summarizing and visualizing them that way is a wholly new way of working for the HQ sub-unit team. It manifests both its willingness to learn more about other countries' experiences as well as its openness for alternative ways of working and breaking with traditional patterns.

For E3 (HQ), the transfer of ARE was the facilitator of the sub-units development not just in terms of its openness to cultural diversity but also in terms of new working styles. She stated in her interview:

“In my opinion, ARE has developed a tremendous catalyst effect. We as a company have recognized that we need to transform. VUCA, agility, all these buzz words drift through the organization since two years but we also recognize how challenging it is to really get to another way of working. And what I see is that ARE has moved this transformation from the rhetoric headlines to actual different attitudes. Where I feel that we don't talk about the theory of how to be agile or how to achieve co-creation [...] but that we are actually doing it. This has led to a much faster and deeper transformation like it would have been the case otherwise. We would have gotten there otherwise as well, but not in this intensity.”

### The emerging spirit

What's also frequently mentioned in the first interviews by both the HQ sub-unit team members and the agency representatives and also emerges as a powerful theme in the lessons learned workshops is the so-called *ARE spirit*. I tried to remember and trace back in my field notes when this notion was used first but it obviously suddenly was there. It is difficult to describe and grasp as it can be considered as a feeling shared by all persons who were involved in the practice' transfer and which resulted into a sense of belongingness. It was made an explicit subject of discussion only once during the first lessons learned workshop. Here, the participants were asked to bring an object which symbolizes the *ARE spirit* for them. As a consequence, one of the short learning videos produced later dealt with it. Apart from that, this spirit was rarely described, but always present, invisible like oxygen in the air. It was an unwritten, tacit, intangible understanding especially between the HQ sub-unit team members which resulted into everyone nodding and smiling whenever someone referred to the *ARE spirit*. I found it interesting to make a short note about it here, because the *ARE spirit* can indeed be understood as a kind of team culture. This is how the video describes the *ARE spirit*:

“Hi, I'm [name] from the HQ ARE team. I want to talk to you about the *ARE spirit*. What is the *ARE spirit*? So, implementing ARE is really a great challenge. And to master this challenge one aspect is really crucial and this is the *ARE spirit*. So, what is the *ARE spirit*? First of all, it means being courageous, taking a fresh look at things and sometimes also thinking out of the box. ARE requires different skills such as creativity or coaching skills. Thus, team collaboration is really key. And last but not least, the customer is always in the center. Customer centricity is key and we always need to put ourselves into the shoes of the customer. In a nutshell: *ARE spirit* means three things: First of all, enter your best. Secondly, embrace diversity. And thirdly, put the customer always in the middle.”

The way, the *ARE spirit* is described here shows how difficult it is to actually describe it. The description plays on different levels – it's a



patchwork of ways of thinking and working, team spirit and diversity and the main aspect of the practice itself, i.e. customer centricity. Thus, according to this description of the ARE spirit, it simply is everywhere, hovering over the practice, its transfer and implementation and the people engaged in it.

The following picture helps gaining a further understanding of it. It shows what the essence of the ARE spirit is for the participants of the first lessons learned workshop:

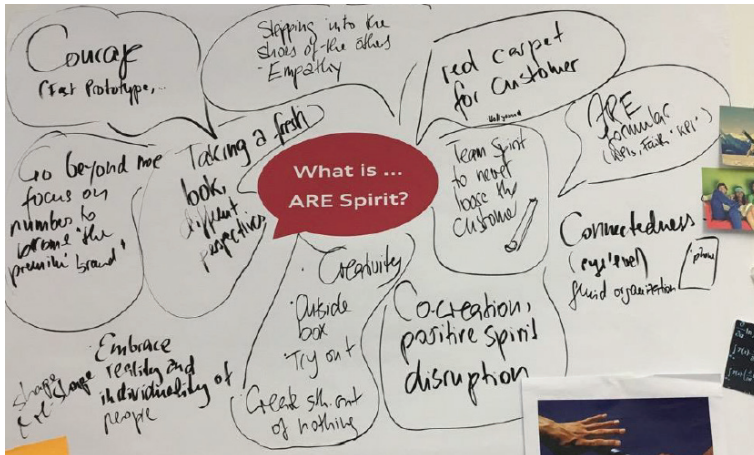


Figure 33 The ARE spirit (internal document, Findings summary ARE Pilot Lessons Learned Workshop, August 2018)

Reading through terms like courage, creativity, outside the box, team spirit, connectedness and so on makes it even more reasonable to think of this spirit as a culture, a culture that is specific for this particular transfer and which transcends organizational boundaries, that shapes and is shaped by everyone who is involved in the transfer. One of the agency members (E9) who supported the development of the training material states:

“The spirit is born from collaboration, of course, it has a lot to do with that. That ARE was so successful in this first phase is mainly thanks to this spirit. And that’s again about co-creation, agile, on eye-level, that is, how

we worked on that project has a tremendous power. And this power can unfold as well on site, if, how do you say that, it has to emerge somewhere. It's somewhere, the fire, this core fire needs to sparkle somewhere and then others can be ignited as well. [...] But how do you measure spirit? Depending on the kind of worldview you have, you either understand it intuitively or have the impulse to question it intensively.“

The notions of power and worldview, the impossibility to measure this spirit as a way of working once more points to the spirit being the team's or transfer project's culture. In none of the interviews I specifically asked for it, probably because I was myself – being part of the team and influenced by and shaping its culture – not really conscious about it. But in all interviews, my colleagues at one or several occasions implicitly or explicitly mention the ARE spirit or describe the way people cooperated within the transfer project in similar terms. For instance, the expressions E3 (HQ) uses in relation to that spirit are creativity, consciously looking at the world, fun, team, co-creative, fast and light, agility and transformed way of working. E1 (HQ) uses the term spirit when describing the voluntariness that underlies the practice transfer and that people need to believe in the practice in order to be able to successfully implement it. E2 (HQ) highlights the mutually enriching collaboration and the “commonness” within the transfer at several occasions and how good he feels because of that. It seems like the ARE spirit is the essence of everything done within the transfer project. It is what shapes the identity of the sub-unit team, and what makes each and every one express a strong emotional attachment to it. In this case, equating it with the term organizational or team culture seems more than appropriate – and that's where double-loop learning gets visible once more: The transfer of ARE didn't just have an effect on the transfer strategy but also on the organizational mental mode or culture (Bartel-Radic 2013). It is therefore an important, emerging part within the intercultural organizational development of the sub-unit's team and a product of the shared experiences and learnings that were made (Schein 2016). The term “ARE spirit” therefore is an expression “that symbolize[s] some of the essence of the shared experience” (Schein 2016, p. 9). At the same time, thinking of this spirit as a kind of

team culture or team spirit, it may also be understood as a pre-requisite for learning: In his conceptualization of a team learning cycle, Bijlsma (2015) names team spirit as one of three mutually enhancing effects which contribute to team learning. Openness, respect for each team member's view, trust and commitment are components of team spirit and enable a safe environment where knowledge can be shared freely between individuals in a reflective dialogue. Thus, the ARE spirit may be a product of the team's experiences and learnings and an ingredient for that learning was able to happen at the same time.

### **Rooms for development**

A third aspect apart from the learnings made and the team culture which emerged that is found to be relevant from applying an OD lens during the analysis of the first interviews is what interviewees expressed about the further development that is still needed. If the ARE spirit is considered as a practice transfer or team culture, it is implicitly present at some occasions within the interviews from research phase 1, when the way the HQ sub-unit team is working within the practice' transfer is described as contrasting with the organization's culture as a whole. E1 (HQ), for instance, describes:

“This attitude of ‘you need to have thought through every little detail before going out and talking to the dealerships’ somehow is part of our DNS. Maybe that stems from the perfection of our cars, that we rather postpone the introduction of a new model ten times and oversleep the first years of electric mobility than accepting to launch a vehicle with weaknesses. And within this company culture we are working along a wholly different way.”

This focus on details and perfection, for him, stands in contrast to the flexibility needed for successfully transferring the practice. In addition, he refers to the fast prototype of the practice at the very beginning where insecurity was high and for which the underlying idea was to explicitly *not* having thought through everything in detail but to rather quickly test a rough idea – which is the complete opposite to planning for every detail like it is traditionally done within the broader organi-

zation. In parallel, E1 also reflects on the way the training program was set up for the practice transfer – after the practice itself was fast prototyped – and finds that here, the sub-unit team still needs to work on exactly this kind of flexibility:

“The detailed description until the smallest guideline [...] making the concept bigger and bigger in order to not risk to forget anyone. And by doing that we are lifting the barrier for markets which want to transfer the practice because they are overwhelmed by all the things they need to consider in order to avoid failure. That’s again the German tendency to write down everything, to think through everything: ‘We have defined 1200 pages. If they cannot implement it, it’s definitively not our fault.’ And I think that’s something we still need to solve and be self-critical about.”

This is similar to what Barmeyer (2018) describes in an example of different understandings of the term concept within a French-German project team: Having agreed on exchanging on a *concept* developed separately in their respective groups, the German group brings a folder with potential solutions while the French group brings a first, sketched idea. Misunderstandings arise on both sides like “The French haven’t done anything again – it seems like they don’t want to cooperate with us” and “The German ‘steamroller’ has overrun us again. They did all work without us – it seems like they don’t want to cooperate with us” (p. 197). This German ‘steamroller’ seems to be active in this case as well – still, but there is a first reflection on it which carefully points to the vision of an alternative way of thinking and working. E1 (HQ) additionally sees another area of development when it comes to becoming even more open towards alternative approaches than it is already the case. In other words, he sees an even bigger need for ethnorelativistic attitudes within the sub-unit team:

“We need the openness to accept other approaches, to consider them as being good and try to get to the bottom of why they did that and what are the good things in there? Instead of first saying: ‘That won’t ever

work and it won't have any impact.' We need to dive much deeper into what they did differently and how this maybe resulted into having the same effect."

For him, a further development of the sub-unit in this regard is not enough. I was also able to sense a certain kind of frustration, when he expressed that the company as a whole would need to be more ethno-relativistic: "We are not used to give freedom for independent decisions. [...] I don't know why. It's a mystery to me, why we [the HQ] claim to define what's best for our dealers." Here again, the way of working and thinking within the sub-unit team stands in contrast to the attitude of the broader organization as a whole. This somehow contradicting assumptions and attitudes will become a major subject of discussion in the subsequent chapter. Here, applying a multiple cultures perspective is helpful in order to explain this complex and contradictory culture landscape within the same company (Maimone 2018).

Further, E3 (HQ) senses the presence of a kind of openness and states that "we have started the topic of co-creation tentatively, but we are still not consequently pursuing it". Similarly, co-creation is for M1 (HQ) "the way how we need to collaborate in the future." Here again, the clear and transparent attitude displayed by M1 is essential. He as the sub-unit's leader is the one who decides upon the strategic orientation and approach to the transfers that are executed on a regular basis while – even more importantly – he serves as a role model with regards to interculturally sensitive behavior (Frey et al. 2006; Peus/Frey 2009).

E3 (HQ) expresses a strong vision for future collaboration as well:

"What we need to do is to integrate the stakeholder perspective much more, that is, real co-creation, in order to steer the continuous innovation process that we need via networking. We need less content, more networking opportunities which are well structured. Where we offer a good structure and space, the environment for stakeholders to exchange with each other and make this exchange productive again. Knowledge management, that is, to take what arises from this exchange and give it back again into a productive environment. There we really can get one step further. Less pre-descriptive content, that we need to give ready-to-

use content but more exchange. And we need to enable ourselves for this, we need to change our roles, the conception of ourselves and develop the tools and methods for that.”

The last sentence in this statement here again shows how reflective E3 (HQ) is with regards to the sub-unit's own development: With stating that roles and the conception of one's self needs to be changed, she implicitly points to embedding this vision into the organizational theory-in-use (Argyris/Schön 1979), to fully institutionalizing this vision and these first, developmental steps made following on the learnings.

That the sub-unit team members reflect on what is still to do in order to develop further is a powerful basis for its actual further development and forms the foundation from where my work as an action researcher started. All these tendencies I have described above and the visions expressed are showing that there already was a development going on towards increased ethnorelativism which I found really interesting to further foster and contribute to as an action researcher.

### 7.2.1.2 Intervention I = Reflections part II:

#### From the old into the new

The second main step in this first period of learning and reflection was a workshop I conducted with the whole sub-unit in May 2019. I expected M1 to be open for such an intervention from my side and he indeed encouraged me to do it and expressed that it was a great idea. I called the workshop “Interculturality at our sub-unit: history, status-quo and future”. This was my invitation text:

“Dear colleagues,

I would like to invite you to a workshop in order to discuss our past, current and future management of interculturality. I think we have gone through a development as a department over the last years which is worth to discuss and reflect on. The goal of this workshop is to become conscious about our interactions with international markets and to define a joint vision.”

All employees except for one of the sub-unit participated in this workshop, i.e. 10 persons in total, including the department's leader, M1. Again, it is important to note here, that not all of them were engaged with transferring ARE: E1, E2, E3 and M1, who were already interviewed for research phase 1, were the core team responsible for the transfer, while E4 and E7 joined the team at the beginning of 2019 and E8 left the practice transfer team end of 2017. Thus, when I conducted the workshop, E5, E6 and E8 haven't been part of the core ARE transfer team and, in the case of E5 and E6, never have been part of it. The learnings made by their fellow colleagues do therefore not necessarily apply for them as well, nor does the culture or ARE spirit that developed within the ARE team. This again is an example for what Maimone (2018) calls a "fragmented and conflictual cultural landscape, which contradicts the supposed structural coherence of organizational culture" (p. 20). The following graphic shows a first visualization of the sometimes conflicting cultural identities that exist within my research environment.

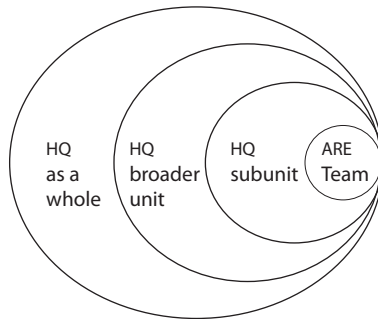


Figure 34 Multiple and sometimes conflicting cultural identities

The workshop was meant to, first, providing space for collective reflection and retracing the department's development until now together as a starting point and the basis from which we could proceed further. Or in other words: It is part of the *diagnosing phase* which already had started with the first round of interviews. Until then, I hadn't experienced a dedicated format for joint reflection – apart from the two lessons learned workshop –, not to mention reflecting the sub-units own intercultural behavior. I therefore provided the space and opportunity

to reflecting the sub-unit's core task of interacting with international markets.

The workshop was structured along some guiding questions: Are we interculturally competent? What do we mean with old and new world in terms of training and qualification? How did we interact with the international markets in the past versus today? What changed? And: What's our vision for future collaboration?

### **Intercultural competence**

With asking the first question of "Are we interculturally competent?" I intended to introduce the topic of culture and interculturality and lay the foundation by opening up the participant's "intercultural minds". In groups of two or three, I asked them to think about what intercultural competence means and collect their thoughts on cards. Answers involved recognizing and understanding other cultures and their specifics, accepting, valuing and appropriately reacting to them and ultimately jointly creating an added value. Also, gaining an understanding of one's own culture was found to be necessary before recognizing the existence of other cultures and understanding them. Terms like respect and appreciation are added, knowing about and accepting differences and adapting to them, listening to international markets and not wanting to control them. The underlying condition for intercultural competence is for them openness, curiosity and interest in other cultures. E1 also highlights that intercultural competence is also about making mistakes, consciously reflecting them and by doing that develop further. He contrasts this approach to further development with "reading a lot of theory and behave like a robot". This statement goes well in line with what he expressed in the interview before and shows once more how reflective he is on what happened during the transfer, what was good and what could have been better or done in another way. E3 adds that the department is on a good way towards intercultural competence but that sometimes this competence could be more conscious. For her, things often happen intuitively and that the goal, for her, would be a *conscious* intercultural competence by, for instance, drawing more on scientific research.



E2 adds that language for him is an important part of intercultural competence, i.e. that one is able to speak English as a lingua franca. Another contribution E2 makes is “granting adaptations” although granting freedom for adaptations would often result into “that they do their own thing and that we don’t get together”. That is, for him, adaptations shall be made together in order to jointly create the best for everyone instead of everybody going his own way. E1 adds that this approach would additionally prevent the “abuse” of culture: “In our context, culture is often used to resist projects in order to assert political issues or make things differently. China is different and so on...” E3 raises the question what the difference then is between adaptation and co-creation and how this relates to power discrepancies between the HQ and its subsidiaries. The notion of power will emerge at several occasions in the run of the workshop which is why a digression about the HQ’s power – or powerlessness – shall be made:

**Digression I: Powerful or powerless? Or: The relation of power to a company’s international strategy**

E1 already has raised the issue of the HQ’s influence in the first round of interviews in 2018 and recognized that the HQ’s power – at least in the context of this particular practice transfer and training in general – is rather limited. He reflects on this issue several times during the interview (see figure 33, statements 1 and 4) and states, for instance:

“We continue putting our feet in that we consider our influence to be bigger. For instance: We present ARE and its transfer so far to the member of the board of management responsible for sales<sup>8</sup> and he says, yes, do it, roll it out. In the next step, we request support budget from the company like robots for three years, amounts of money where everyone passes out [...] We went out of this presentation naively

<sup>8</sup> This presentation was an important landmark for the ARE transfer. It took place after the rapid prototyping, while the pilots were running and was aiming at gaining the board member’s commitment to further proceed with a broader transfer to more countries – including his commitment to huge financial support.

thinking that when this member of the board says so, our impact, our circle of influence gets bigger. That's just not the case! Since then I am reducing the budget every week. We don't need all that money."

Money is mentioned as one mean of power in the workshop as well, although only marginally. E5 feels that there is a conflict between being the HQ on the one hand and trying to foster co-creation on eye-level on the other. For her, a cooperation on eye-level does not seem to be possible, simply because of being the HQ – which once in a while makes use of this structural power. Several examples are mentioned here: For instance, E5 and E3 question whether the participation of international subsidiaries in conferences, train-the-trainer events or even in the transfer of concepts such as ARE is really voluntary because they are intrinsically motivated to do so or whether they feel kind of forced by either money (in the case of the ARE transfer), standards that are set (in the case of ARE<sup>9</sup>) or because it is the HQ which says to do so (in the case of the participation in events). E8 throws in that for the Qualification Summit which took place one week before, HQ managers called the US subsidiary managers which refused the invitation, asking them again to please join the conference. In the end, US representatives took part. On the other hand, how E5 counters, the Italian training manager asked for someone from the HQ training department officially saying "you need to come!" in order to actually be allowed to participate in the conference by his boss. E6 raises another issue related to the notion of power stating that the HQ doesn't treat each subsidiary equally which, in his opinion, isn't fair:

"Interculturality has always something to do with treating each market more or less equally. [...] But when I look at how [the HQ] is behaving... If Germany says 'I don't want that', [the HQ] changes its strategy or at least starts questioning it. If Italy or UK would do that, we would

<sup>9</sup> From April 2020 on two of the new roles and the sales process within ARE are becoming part of the so-called dealer contracts which govern the standards that needs to be complied with by every official dealer of the brand

show them who the boss is. If the US would say ‘we do whatever we want, shout up, the main thing is that the numbers are good’, we would accept that. If Spain or France would do that, we would be hopping mad. And we are not talking about Luxembourg versus Germany, no, we are talking about the real big players.”

Thus, what he calls unequal treatment could be the result of power exerted by the subsidiaries (Ferner et al. 2011) or their respective weight or voice (Bouquet/Birkinshaw 2008).

M1 summarizes that in the case of the ARE transfer, power and the HQ’s influence wasn’t pivotal and didn’t lead to anything. This coincides with the initial, seemingly slightly frustrated statement of E1. Rather, M1 states that „on this continuum of using one’s power and intrinsic motivation of subsidiaries, we are a department which is located close to the motivation side and ranks low on the power side”.

The discussion was very lively. In that moment, I preferred to just let it evolve and go with its flow and observe (Schein 2000), I didn’t steer it very much. I sensed a strong need to discuss all those topics among the sub-unit members. During the daily working routine there normally isn’t enough time to collectively think through these kinds of questions. This is the backbone of my action research approach: the joint, collective investigation into pressuring and central questions that normally are not explicitly made a topic under discussion. By collectively discussing them, we became partners in a joint research process.

Apart from the digression on power relations between the HQ and its subsidiaries, another topic emerged during this first part of the workshop which shall become a recurring point of discussion and an important effect in the departments intercultural OD. Therefore, another digression shall be made in the following.

### **Digression II: The big inner conflict**

E5 introduces the discussion on a popular dilemma by stating that some German values are indeed appreciated by international sub-

subsidiaries, like, for instance, the accuracy and exact specifications which traditionally characterize the training concepts designed by the HQ sub-unit. But at the same time, “we are moving into another direction”, i.e. granting more flexibility and stop prescribing every little detail. E6 and E8 share their experiences from Japan and China where clear descriptions of what to do are expected from the HQ

“while the US subsidiary would say: Leave me alone! And that’s something we need to deal with as well. We do think about how to design this and that but we need to reflect on whom we encounter as well. And that’s why we probably cannot open it up completely yet because it would be met with incomprehension” (E8, HQ).

E6 raises another yet related conflict which stems from the multiple organizational cultures, the sub-unit has to deal with and is supported by E5. Both argue that there is no orientation, no clear statement from the company as a whole that guides intercultural behavior. E6, for instance, states: “The question is: I have a job to do for what I’m getting paid. On the one hand, *they* say: Develop concepts and provide orientation. On the other hand, we say, just do what you want.” Also, what is leading to a lot of confusion in the whole team is the volatile strategic orientation provided by the HQ as a whole when it comes to the so-called “focus markets”, i.e. those markets that have the highest priority and therefore are the first ones to be taken care of also by the training department. These focus markets are highly volatile in the sense that their number and which of them are on that list is changing constantly. I.e., there is no clear guidance from the HQ as a whole. E3 tries to find a solution for that inner conflict:

“I see two aspects: On the one hand, there is the agility of adapting the strategy. We see that the strategic approach related to which markets are in, which ones are out, where is the focus, it’s mobile. On the other hand, we have learned that we cannot progress with power, pressure and pushing of our model into one-size-fits-all. I think, it’s

a chance to say, okay, these are our strategic goals [...] how can we implement these goals together with the USA? What does it mean to achieve these goals with the USA? What does it mean to achieve these goals with Japan? That is, starting from a conscious interculturality, evaluate chances together and find a common, different approach to translate them into the target context. That's a huge challenge, but I cannot see any other way. Otherwise we will face a huge dilemma if we say, yes, we have these goals, we need to achieve them, but at the same time we know that it won't work with pressure and prescriptions.”

This statement shows very well how geocentric the attitude of E3 already is. She is able to integrate various perspectives and recognizes that in light of the strategic goals that need to be achieved on the one hand and the realization of the uselessness of squeezing all subsidiaries into the “same size” in order to achieve them on the other hand, the integration of both the global vision and the local needs in a cooperative way or even an negotiated new way is how both lines can be combined. This attitude contrasts sharply with what is expressed by E5 who only sees the option of providing guidelines or “laissez-faire”, how he calls it, i.e. letting subsidiaries do whatever they want.

Thus, there is a twofold inner conflict noticeable where a decision which way to go causes tensions: The attitude towards international subsidiaries and conflicting organizational cultures.

Going back to the discussion on intercultural competence, E5 and E6 recall the existence of a dedicated area qualification manager who, in the past, was responsible for a defined region and acted as the main contact person for all subsidiaries within that region for the topic of training. On several international conferences, I heard a great number of subsidiary training managers saying that they really enjoyed having one central contact person and that they would love to have this role back. For a number of reasons this role was removed before my research within the department started which resulted into multiple persons being in contact with one and the same training manager. E5 and E6 who have both been working for the department already for a

rather long time compared to the other members of the sub-unit reflect on these former times where a close, long-term, and trustworthy relationship was possible thanks to that role. This therefore also enabled an adequate intercultural behavior. In contrast to other transfer projects steered by the HQ sub-unit, the ARE team again relied on naming one transfer responsible per country. This resulted into a close relationship and trust. E1 (HQ) summarizes:

„I think, intercultural competence or, let's say, the closeness to the markets [...] has become a currency and we are high in that. Because we simply have a good connection to our markets. For the transfer of ARE, we decided to again introduce these market responsible. I have never reflected that much on it but I think, this is the basis for that we can enter into that exchange in a much more trusting way.”

E6 shares his thoughts about asking where the difference lies between interculturality and trusting and knowing each other. He feels that familiarity helps in accepting cultural differences. E5 agrees and states that, for her, developing a relationship is a condition for being able to “sense culture”. E2 agrees as well and states that a lot of international projects exist *because* there is this trust, but this often is just not made a topic of discussion. Thus, everyone agrees in that trust and knowing each other well is an important factor in international cooperation.

From that, I lead the discussion back to the collection of dimensions of intercultural competence and a reflection on where the sub-unit's current intercultural competence could be further developed. E3 repeats that she would wish to become more conscious about culture and interculturality and states that my presence as a researcher enables her to more and more apply a meta perspective of looking at what she does and how she interacts with other countries which contributes to her individual learning. This is one of few direct verbalizations of my impact as an action researcher on the sub-unit's learning and development process. M1 and E2 would want to be more conscious about one's own culture. M1 shares that he frequently asks members from other cultures how they would describe the German culture. The example answers he mentions are all negative, such as Germans being stiff or humorless. E2 therefore adds:

“I would like to know more about what others appreciate most about us. There are always these negative things, but to know what others appreciate... also in order to find a connection, because we know much about the other culture but we need to be careful with saying ‘well, you are different, so, do it like you want’, because, where is the common ground then?”

This shows very well the desire of E2 to not abandon one’s own culture for the sake of granting freedom but rather emphasize the good things of one’s culture that one could add to a joint collaboration and negotiation, like an ingredient of a newly developed recipe. Following on that, M1 shares an experience from a meeting at the Italian subsidiary, where a HQ intern with Italian nationality indicated that it would be disrespectful to be at the meeting room *on time* and thus, *before* the Italians being the hosts. Therefore, the HQ delegation, consisting of M1, E1 and E3 arrived some minutes late at the meeting room, only to find out that the Italian delegation has been on time and was already waiting for them. E1 shares a similar experience from Japan where the German delegation was surprised about the directness and obvious opposition displayed by the Japanese colleagues:

“I remember this business trip where the Japanese played the role of the Germans and surprised us completely. They said things like ‘We don’t like this. Ah, this is not good!’ And we thought, ‘Eh? What about face saving?’ They adapted to us and we adapted to them, i.e. they encountered us in a European way and we encountered them in a Japanese way. We just changed roles.”

These two examples suggest that the subsidiaries in these cases were used to adapt to the German way of being, such as being on time or communicating very directly. They were, thus, used to adapt to the dominant culture of the HQ. Taking a look at the Fürberger Matrix and the ethnocentric orientation therein, intercultural competence is only relevant for subsidiaries (Barmeyer et al. 2012) – one could therefore draw the conclusion that subsidiaries so far were socialized in a rather ethnocentric corporate HQ approach towards them. Entering now

intercultural competent HQ representatives into the equation resulted into these specific intercultural situations.

At the end of this first part of the workshop, I introduce them to all dimensions, i.e. the affective, cognitive and conative dimension of intercultural competence and their components (Barmeyer 2018). All in all, this first discussion on intercultural competence revealed that, on the one hand, the sub-unit team members already display a certain degree of intercultural competence, primarily gained through their experiences from working in an internationally oriented department and continuous interactions with international subsidiaries. Also, the transfer of ARE has had a positive effect in this regard. On the other hand, the discussion has surfaced three important additional topics I hadn't planned with but are shown to be of pressing concern: power relations, the heterogeneity of subsidiaries and multiple culture realities within the HQ.

Especially the latter keeps on being a topic of discussion afterwards: M1 shares an experience from a business trip to Japan together with a German colleague from another HQ department which is dealing with sales and business development in Japan. This colleague "took his backpack with 18 topics, emptied it on the desk of the Japanese guy, littering him with what he needs to implement for [the HQ]" (M1, HQ) without showing any interest into the Japanese way of doing things. E5 refers to different tasks and therefore also to different approaches and cultures within the company as a whole and that this colleague from sales and business development is "polarized" as being the one who has to push through certain topics and targets in international markets. M1 doubts that this approach leads to success, as does E5: "In my honest opinion, I think that this German way of 'we dictate things' has reached its limits." E5 shares a recent experience from her engagement with the neighboring sub-unit team where, she feels, it's all about steering and controlling even more. This contrasts sharply with her opinion:



“It’s all about pressing and pushing more and more, so that we don’t recognize that, on the opposite side, there will be no other way then shutting down. There is no self-responsibility! But the more uncertain the future is, the less we can tell them what to do and the more we actually need to listen to what they need and strengthen their own competencies.”

E6 summarizes: “It’s again all about our strategy. Do we want our subsidiaries to be independently steering their markets or do we want them as our vicarious agents who implement our wishes one to one?” For E5, the uncertain, volatile times are triggering rigid and tough instructions from the part of the HQ which don’t allow for co-creative and competent intercultural behavior. She is getting quite emotional in saying that and uses words like “harsh”, “hard cuts” and “whip” as opposed to “open”, “co-creative” and “on eye-level” for describing this dilemma. For E3, the strategic communication of the HQ as whole at that point in time is triggering the fear system instead of “establishing an authentic openness” which would allow to use this uncertainty productively and establish a good vision. E6 again raises the issue of conflicting organizational cultures within the HQ, stating that for subsidiary managers it must be difficult to deal with this variety of cultures:

“On the one hand: Dear subsidiary, I don’t give a damn about you, bring me the numbers, that’s all I want from you. As opposed to people like us who want to listen, who want to act together. That has nothing to do with German culture, but with [the HQ’s] culture because it is not clear. And that’s probably why, recently, this area of tension is so onerous for us, because we don’t have a [HQ] culture of how to interact with others.”

These conflicting cultural realities seem to, on the one hand, hovering over everything and, on the other hand and like E6 has said, have only *recently* been sensed that much. This tension of conflicting cultures is frequently mentioned, especially by E5 and E6, the two members of the sub-unit who haven’t been part of the ARE practice transfer. This leads to two possible conclusions: First, although they haven’t directly been part of the learning process the ARE transfer team members have gone through in the run of the transfer, they nevertheless, being part of the

same sub-unit, recognize this recent change in attitude, value it and are about to make it their own as well. Second, as E1 and E2 don't actively participate in the discussions about this conflict and E3 tries to propose solutions to it, this tension does not seem to be felt that much by the ARE team members. This could mean that the ARE transfer team has internalized this development and change of attitude and commit to it that much that they don't even question its fit with the overall company strategy. In other words, they are convinced about the rightness of their attitude and approach that they do recognize that their way of working is different (see various interview statements of E1, e.g) but wholeheartedly stick to it no matter what other ways might be indicated by other organizational cultural realities and how frustrating the existence of these other realities might be for them. This belief is of course facilitated by M1's attitude which has been shown to be characterized by a great interest in cultures, his emphasis on listening to and getting to know subsidiaries and cooperating with them as partners on eye-level. E2, for instance, has expressed in his interview in 2018 referring to the transfer of ARE: "The freedom in terms of collaboration is what great emphasis is now placed on within our [broader unit] and which is really beneficial for our project".

Looking back now at all the issues that emerged during these first two workshop hours after only having asked the question "Are we inter-culturally competent?" shows how great the interest into that topic is from the part of my colleagues and at the same time, how hungry they are to talk about all these issues. The recurring theme is the inner conflict in terms of finding ourselves in the middle of contrary organizational cultures. This first phase of discussion where I didn't intervene much, is highly valuable. First, it brought various themes to the surface that are relevant to both the research and practical context and until then were an unobserved but present and important part of the organizational universe. Second, it mirrors the enormous complexity researchers might face when engaging in ethnographic research. I therefore tried to map it as it is, without trying to reduce this complexity – hoping for not confusing the reader too much.

### **The old and the new**

After summarizing the first part of the workshop including some further reading suggestions, I introduced them to the second question: What do we mean with old and new world in terms of training and qualification? I expected this question to be contributing most to my research on the sub-unit's intercultural organizational development as it specifically aimed at contrasting the "before" and "after" of the development and at revealing the developmental steps of the department with regards to its attitude and strategy towards international subsidiaries. Again, I asked them to gather into groups of two, preferably composed of one person who has been working for the sub-unit already for quite some time and another person who recently joined. They got some time to build contrasting pairs of terms which describe the old way of doing in terms of training and qualification as opposed to the new way. I will now build up the analysis along the interpretive analysis proposed by Romani (2008). In the interpretive analysis part of her paradigm interplay in "Relating to the other", she applies a method of analysis that aims at detecting the hidden meaning systems in texts. In my case, it is not an interview text but the transcript of a workshop. For this way of analyzing text, it is essential to view the text and the symbols in it as a whole and in relation to their context. It's all about entering into dialog with the text, diving into it, questioning it and understanding it in its entirety. Romani further structures the resulting meaning systems along oppositions, i.e. she pays attention to what is stressed and what isn't – a way of interacting with the text that makes meanings explicit and visible. By asking the participants of the workshop to form contrasting pairs, I facilitated this kind of analysis already from the beginning of collecting the data. There nevertheless might be hidden meanings and things that are unsaid but present. In the following, I will mark these hidden meanings with *italic* words.

M1 and E4 first shared their contrasting pairs which describe the old and new world of training and qualification:

“In the old world of qualification, we had a one-way street, [the HQ] to the subsidiary, we told them what to implement and what needs to happen and that’s where it was done for us. Today we have, how we call it, dialog, exchange, we listen, we also want to help, we want to improve ourselves. That has changed significantly.” (M1, HQ)

From this statement one can draw the obvious opposition of “one-way street” as opposed to “dialog” and “exchange”. But diving into the text in an interpretive way, reveals much more: Making explicit that the sub-unit’s job was done or finished with saying what to do when describing the old world means that this wouldn’t account for the new world – although it isn’t made explicit in the description of the new world. That the HQ’s job in the new world isn’t anymore to tell subsidiaries what do to would be an example for a ‘hidden’ meaning. It is then further explained by saying that it’s all about dialoging and exchanging, thus, communication is more continuous than in the old world and in both directions. Similarly, the emphasis on listening, wanting to help and improve oneself is explicitly made for the new world, which allows to assume that in the old world, the HQ sub-unit didn’t listen or help, nor did it want to improve itself. The latter one might even refer to the sub-unit’s perceived infallibility during the old days. By contrast, today, the sub-unit wants to improve itself and its work, which was for instance also demonstrated by the two lessons learned workshops where subsidiaries were actively asked to provide feedback in order to further improve the practice. Putting all these meanings together, a first starting point for a meaning system around the old and new world of training and qualification looks like this:

| <b>Old and new world of qualification</b> |   |   |  |
|---|---|---|--|
| One-way street                            | Tell them what needs to happen              | <i>Don't listen, don't want to help</i> | <i>Don't want to improve/perceived infallibility</i> |
| Dialog, exchange                          | <i>Don't tell them what needs to happen</i> | Listen, Want to help                    | Want to improve ourselves                            |

Table 8 First organization of themes around old and new world of training and qualification

This is just one example of how much meaning can be extracted from a little piece of text. M1 further highlights a difference between the train-

ing concepts that were developed in the old and the new world. The terms mentioned here are “process vs outcome orientation” and “attention to details vs big picture”. While in the old world of qualification, there was a strict guideline of how to develop training concepts, the so-called concept development process, the new world of qualification is more focused on the real outcome of training, i.e. the process of how to get there is no longer prescribed. In the old world, training concepts were extensive, not least because every little detail is described exactly: “In the trainer’s handbook, we even wrote down that the trainer is welcoming the participants at 9:03 am and that at 9:13 exercise 1.2 shall be started” (M1, HQ). M1 assumes that this might have led to incomprehension on the part of the subsidiaries. Development times were long and „once finished we immediately started again from the beginning because time was already ahead of us.” In the new world, by contrast, it’s more about transferring the big picture, the main idea of a training concept or practice, the exact design of it is left to the subsidiary. M1 again names the so-called unsolicited gift as part of the ARE practice as an example, where the sub-unit team learned quickly that a central definition is not doable. Transferring merely the big picture or philosophy of a concept saves development time which allows to adapt better to the fast changing environment.

The resulting meaning system of the nature of concepts and the way of concept development looks like this:

| <b>Concept development in the old and new world of qualification</b> |  |   |
|--|--|---|
| Process orientation  | Detailed description of how a German training concept should look like | Incomprehension on the part of the subsidiary |
| Outcome orientation  | <i>No detailed description, outcome is important</i>                   | <i>Comprehension</i>                          |

Table 9 Organization of themes around the nature of concepts and concept development in the old and new world of qualification (part 1)

| <b>Concept development in the old and new world of qualification</b> |                            |   |                                     |
|--|----------------------------|---|-------------------------------------|
| Attention to detail  | Insanely extensive concept | <i>Exact design is taken care off by HQ</i> | Extremely slow                      |
| Attention to big picture/ philosophy/ spirit                         | <i>Lean concepts</i>       | Exact design is taken care off subsidiary   | Faster, more flexible and iterative |

Table 10 Organization of themes around the nature of concepts and concept development in the old and new world of qualification (part 2)

Following on M1's presentation, I asked for how much time "the old" is over already. E2 immediately names the ARE transfer as turning point as he already has done during his interview in 2018. M1 agrees: "We learned a lot through and by transferring ARE." Here again, the notion of learning implies that learning had to happen in order to develop. A little bit later in the workshop, E7 assumes that the change in the brand's strategic orientation as a whole in terms of focusing more on the customer – the strategic change which resulted into the practice of ARE – also required different approaches and therefore, for him, seems to be kind of a turnaround: "Emotion, customer experience [...] that's nothing you can speak about in a very concrete, tangible form. That is, there is a need to search for different ways of transferring the knowledge and sense of it and therefore also to find a different approach for gaining acceptance." For E5 and E6, who both haven't been actively involved in the transfer of ARE, it is the point in time where M1 joined the sub-unit as a new leader. M1 as a new sub-unit manager, for instance, abolished the concept development process. However, E5 and E6 argue that its traditions still live on, especially in their cooperation with external, German training agencies whom they have been cooperating with already for quite some time. It is important to note here again, that E5 and E6 haven't experienced the practice transfer of ARE first-hand and therefore weren't able to make all the learnings described in the first reflection part. Thus, the advent of ARE or the new strategic orientation have not necessarily had a great impact on their own development process – M1 obviously had.

E1 and E2 add that in the new world, it's no longer just centrally developed concepts but concepts from the subsidiaries that are adopted by the HQ. E1 names two examples which were originating from inter-

national subsidiaries and were integrated into the central ARE practice. This new theme can be added to the first, broader organization of themes describing the old and new world of qualification in general:

| <b>Old and new world of qualification</b> |                                   |   |   |  |
|---|-----------------------------------|---|---|--|
| One-way street                            | Only centrally developed concepts | Tell them what needs to happen              | <i>Don't listen, don't want to help</i> | Don't want to improve/ perceived infallibility |
| Dialog, exchange                          | Using concepts from subsidiaries  | <i>Don't tell them what needs to happen</i> | <i>Listen, Want to help</i>             | Want to improve ourselves                      |

Table 11 Second organization of themes around old and new world of training and qualification

They additionally bring up a new category of themes referring to the roles and responsibilities within the sub-unit: While in the old world, there was this separation of people who were in close contact with the markets, i.e. the area qualification managers (AQM), and the people who developed training concepts, this isn't separated anymore in the new world. This allows everyone to listen to subsidiary needs in terms of training and directly integrate these needs into the development of training practices. The themes can be organized as follows:

| <b>Roles in the old and new world of qualification</b> |  |
|--|--|
| Role separation between AQM and concept developers     | Difficult for concept developers to get access/ listen to market needs |
| No separation of roles                                 | Easier to get access   |

Table 12 Organization of themes around roles within the HQ sub-unit in the old and new world of qualification

Further, they add themes to the way of concept development: “In the past, we have defined requirements and goals, i.e. we have defined how a sales man needs to work and how the training then needs to look like, learning goals were defined.” (E2, HQ). E2 adds that the needs for training were often defined by other HQ departments or HQ managers and that these needs then were conceptualized together with German

external agencies into a training concept. By contrast, in the new world “market needs are taken into account. For instance, think about our lessons learned workshop where the markets came together and we asked them what they still miss, where we could support. That is, market needs are the basis for concept development” (E1, HQ).

---

**Concept development in the old and new world of qualification**

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|   |   |
|---|---|
| Centrally defined needs, requirements and goals | Cooperation with German training agencies       |
| Market needs as basis for training development  | <i>Not necessarily German training agencies</i> |

---

Table 13 Organization of themes around the nature of concepts and concept development in the old and new world of qualification (part 3)

They also agree on the contrasting pairs of process vs outcome orientation and add that methods and didactics were prescribed as well, although nobody knew whether they would work in the recipient context.

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**Concept development in the old and new world of qualification**

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|                     |  |   |   |
|---------------------|--|---|---|
| Process orientation | Detailed description of how a German training concept should look like, <b>including methods and didactics</b> | Not knowing what works in other countries                   | Incomprehension on the part of the subsidiary |
| Outcome orientation | No detailed description, outcome is important  | <i>Knowing more or trusting subsidiaries that they know</i> | Comprehension                                 |

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Table 14 Organization of themes around the nature of concepts and concept development in the old and new world of qualification (part 1)

They further bring up the term “Impulsgeber”, for which the most fitting English translation would be *source of inspiration* or *initiator*. E1 contrasts this term against attention to detail, process orientation and guidelines from the HQ. He does not describe this term further but he nevertheless specifies the HQ’s role in this new world of qualification for the first time. It is not explicitly contrasted with a term describing the concrete role of the HQ in the past, but rather with themes that charac-



terize the way the HQ behaved and acted respectively, such as process orientation and attention to details. Similarly, “Impulsgeber” can be seen as an encompassing term pertaining to the new world of qualification which is further detailed and described by or at least has a close relation to all other themes. Looking back at the second organization of themes around the old and new world of qualification in general, I intuitively would contrast “Impulsgeber” with “Tell them what needs to happen”. Potentially, the role of the HQ sub-unit has changed in that it is not anymore about *instructing* subsidiaries in their way of dealing with training issues but rather sending out impetus which can be taken advantage of or not and for which the HQ sub-unit offers its support in case it is needed. This makes me think of a comment made by the Polish training manager who – during the international conferences in 2019 – kept on emphasizing the importance of examples, best practices and the latest news in whatever topic, stating that he would be pleased if the HQ could take on the role of sharing these examples and news. Thus, I do not assume that the HQ sub-unit already completely and consciously redefined its role within the global training community, but the ongoing tendencies and developments with regards to team members’ attitudes and ways of training concept development provides a first indication on a change of its role and self-understanding.

The next group, consisting of E3, E5 and E7 don’t bring up many additional themes but rather agree with all previous groups and further detail existing meaning systems. First, E5 further details the way training concepts were developed and transferred:

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**Concept development and transfer in the old and new world of qualification**

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|   |   |   |  |
|---|---|---|--|
| Concepts from the HQ =<br>one size fits all | High effort and<br>financial investment | Path dependency =<br>inflexible = not agile<br>= time consuming | Train-the-trainer<br>for each concept<br>→ pilot → rollout |
|---|---|---|--|

---

Rapid prototyping: Testing an idea, develop concept during testing together with market and stakeholders; situated, variable, no fixed expectations, creative leeway, continuous development

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Table 15 Organization of themes around concept development and transfer in the old and new world of qualification (part 4)

Although there are a lot of overlaps with the meaning systems before, I preferred visualizing this group's thoughts about the differences in terms of concept development and transfer separately: It shows very well how the linear, fixed process of first, develop one-size-fits-all concepts centrally, second, pilot the concept and third, transfer it via a train-the-trainer in a long, path dependent and inflexible process changed to a rather circular, non-linear process of rapidly testing an idea in order to develop the corresponding training concept together and provide flexibility and space for own creative solutions and, above all, develop them further continuously. The development and transfer process, thus, has no clear end. E5 specifies: "If you are a dealership implementing ARE, that does not mean that it is set in stone forever but, by contrast, you enable people to continuously develop and react to changes." Thus, this iterative, circular, never ending understanding of the process does not only apply to the development of training concepts, i.e. to the work of the HQ sub-unit, but also to the effect these new kind of trainings, like ARE, have on the recipient unit. Therefore, if one thinks again about the role of the HQ in this case, the "Impulsgeber" role is far more fitting to the goal of enabling people at recipient units to steer their own change processes than the previous "I'm telling you what to do"- role. However, E5 further reflects:

"When I take all that in now and if you reflect on it, it is indeed a wholly different mindset! But the *old* still continues to have an effect. Like I said before, the concept development process still is existing. We also have partners who have been with us for many years, they know us like that and they now gather new experiences via ARE. It's not completely *new* yet, there is also still *old* in it. That's a process."

E5 recognizes that the change from the *old* to the new world of training and qualification is a developmental process that is still going on. For her, the old still prevails in the form of the frequently mentioned guideline for developing concepts as well as in the cooperation with external partners known and had been working with for a long time. Thus, there are forces which adhere to traditional patterns but also gain new experiences and thus, develop further as well. Lastly, E6 also refers to

the concept development process that no longer exists as a fixed guideline. He also adds that in the past it took quite some time until a training concept was developed while today, development times are much shorter and more dynamic. E5 remarks that in the past, the “half-life” of a training concept was much longer as well, i.e. a newly developed concept was up-to-date for a longer period of time. Today, by contrast, the training landscape is more like a “living system”. These new themes shall be added to existing meaning systems:

| Concept development in the old and new world of qualification |                            |   |   |                               |               |
|---|----------------------------|---|---|-------------------------------|---------------|
| Attention to detail   | Insanely extensive concept | <i>Exact design is HQ's responsibility</i>  | Extremely slow; long development times                              | Long “half-time” of concepts  | Fixed system  |
| Attention to big picture/ philosophy/ spirit                  | <i>Lean concepts</i>       | Exact design is subsidiary's responsibility | Faster, more flexible and iterative; <b>short development times</b> | Short “half-time” of concepts | Living system |

Table 16 Organization of themes around the nature of concepts and concept development in the old and new world of qualification (part 2)

E6 additionally adds that, in his opinion, in the past, the HQ sub-unit's interest into what happened in its subsidiaries in terms of training was bigger. He states:

„In the past, we were more interested into what happens in the markets. Which concepts do you have, how do you proceed? Now we say, do whatever you want, the main thing is that you do the certification. So, one can be a little critical of that as well. Because, asking ‘what are you doing’ shows interest.”

This statement triggers another lively discussion. E2 disagrees heavily with not having interest anymore in what the subsidiaries are doing in terms of training. E5 differentiates between the ARE practice transfer and the “normal”, daily training business and agrees with E6 in that this holds true for the latter one. E6 further details that “in the past we accurately had a look at their concepts as they had to do what we wanted, it was prescribed and when they had another concept, we had to have a look at it and let them explain it to us.” His further explanation reveals that the interest he talked about earlier was primarily motivated by the

need for control and not necessarily by an honest interest in their local solutions and ideas. By reasoning that “asking ‘what are you doing?’ shows interest”, E6 nevertheless searches and advocates for the good things in this “old” approach. He further details that this explanation of local concepts was part of a broader overview the HQ sub-unit received regularly from the subsidiaries which also contained certification rates, KPIs and the general progress of the market in terms of training. Today, no such overview is asked for anymore. Further, he reminds that in the past, training was one of several topics discussed in the annual meetings<sup>10</sup> held with each subsidiary which gave a certain importance to the topic. Now, training is not anymore discussed in those meetings.

E5 also starts to reflect openly about the good things within the old world:

“What became apparent to me right now is [...] that we should maybe think about what was good in the old world which we are lacking today? And I think, everyone who is engaged with ARE has a special view on things but it’s not just all about ARE [...] In the past we had intensive train-the-trainer sessions, we had the area qualification managers and yes, there was this tendency to control, but consequently there was this personal contact. And also a very intensive dialog. And that has gotten lost, except for the ones engaged with ARE.”

This statement shows again how different the experiences of the two teams are within the same department and how dependent the development of the “view” is on the projects someone is involved in. It seems like there are two different camps within the same sub-unit, each having made different experiences and therefore gone through a different kind of development. E3, in her interview before the workshop, refers to them as “silos”, where the one operated primarily in the old world of qualification and the other one in the new. Thus, again, the multiple

<sup>10</sup> These annual meetings last normally two days per subsidiary and covers all kinds of sales-related topics, like the current market situation and sales figures, customer demands, marketing campaigns, dealer net development initiatives etc. Participants are subsidiary top managers and various, rotating representatives and stakeholders from the HQ, depending on the topics discussed.

organizational culture perspective explains and allows for accepting this complex situation within the same sub-unit. The last reflections from E5 and E6 shall therefore be integrated into a separate meaning system, containing a positive view on the old world of qualification.

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**Good things about the old world**

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|   |                     |  |   |
|---|---------------------|--|---|
| Intensive Train-the-trainer,<br>AQMs, tendency to control<br>= personal contact<br>= intensive dialog | More interest       | Overview<br>about progress<br>in the markets | Global standards<br>and KPIs for training<br>issues<br>= high importance<br>of training |
| <i>Superficial Train-the-trainer,<br/>no AQMs, no control<br/>= no contact nor dialog</i>             | Do what you<br>want | No overview<br>= we don't care               | No standards<br>= no importance   |

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Table 17 Organization of themes around the good things in the old world

E6's presentation of the good things about the old world triggers some disagreement from the part of other workshop participants. For instance, E7 reacts to the notion of KPIs and standards that were set in the past with sharing his experience from being a dealer consultant that "the more KPIs were set, the more the dealers started to bend them into the direction we wanted them to be. The benefit was negligible." E3 further adds: „Who are we to prescribe KPIs without knowing how this market works and thinks?" E7 also states that he disagrees with the opinion of E6 in terms of not knowing anything about what happens in the subsidiaries' markets:

“I don't share [E6's] opinion that we don't know anything about the markets. Waiting for KPIs shows us our own incapacity. We can just visit them, call them, talk to them... You anyway get more information from between the lines than from figures.”

This again shows the completely different attitudes between the members of the two teams resulting from the different experiences they have made which makes it more difficult to describe the whole sub-unit's development. The learnings described in the previous chapter only apply to one part of the sub-unit and are rooted in this part's involvement in the practice transfer analyzed in research phase 1. This shows

that merely sharing the experiences made during that transfer with fellow colleagues who were not involved is not sufficient to fully pull along other, uninvolved team members: Of course, the two teams interacted with each other, for instance, during the joint, weekly sub-unit meetings. That is, E5 and E6 knew about the developments and happenings within the ARE practice transfer. But that alone was not sufficient to make them “free riding” on the development the ARE team went through – although there are of course certain tendencies of development into the same direction visible.

The collection of themes and meanings about the old and new world of qualification was a helpful task in order to structure reflections by contrasting what has changed – without really focusing on the process behind that change. For both workshop participants and myself as a researcher, it was helpful to see the different mindsets, roles and practices of both worlds in order to further detail and describe the development that took place and still is going on within the department. The difficulty now is to synthesize its outcomes as the themes and meaning systems are made up from different experiences and different definitions of the events that triggered the advent of the new world. Additionally, the connotations of old and new are sometimes different. In the following, I will nevertheless try to synthesize the resulting meaning systems and their containing juxtapositions of old vs. new into one holistic picture. In doing that, I will differentiate, just like it was indicated in the meaning systems before, between the HQ sub-unit’s role in the old and new world and the related practices of developing and transferring training concepts, i.e. the main task of the department. As there wasn’t any role explicitly named for the old world, I try to find an expression that, on the one hand, contrasts well with the role of the “Impulsgeber” and its related themes and, on the other hand, encapsulates the descriptions of the behavior and mindset of the sub-unit in the past well into one word. I find that “Instructor” is a good counterpart for labelling the sub-unit’s role in the past as opposed to its role as “Impulsgeber” now. Further, I will visualize the themes pertaining and describing the role of the sub-unit separately but within the holistic meaning system of the old and new world of qualification. Thus, the holistic meaning system is made up of two circles: a smaller one for the sub-unit’s role and a big one for describing related practices.

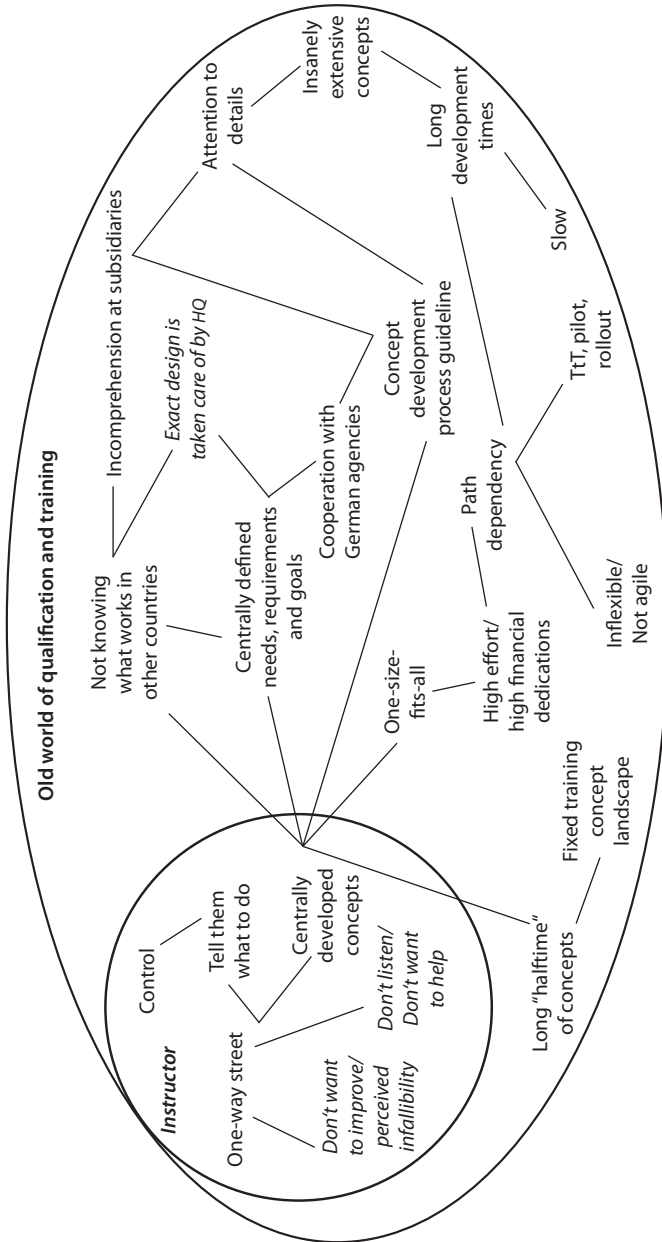


Figure 35 Meaning system of old world of qualification and training

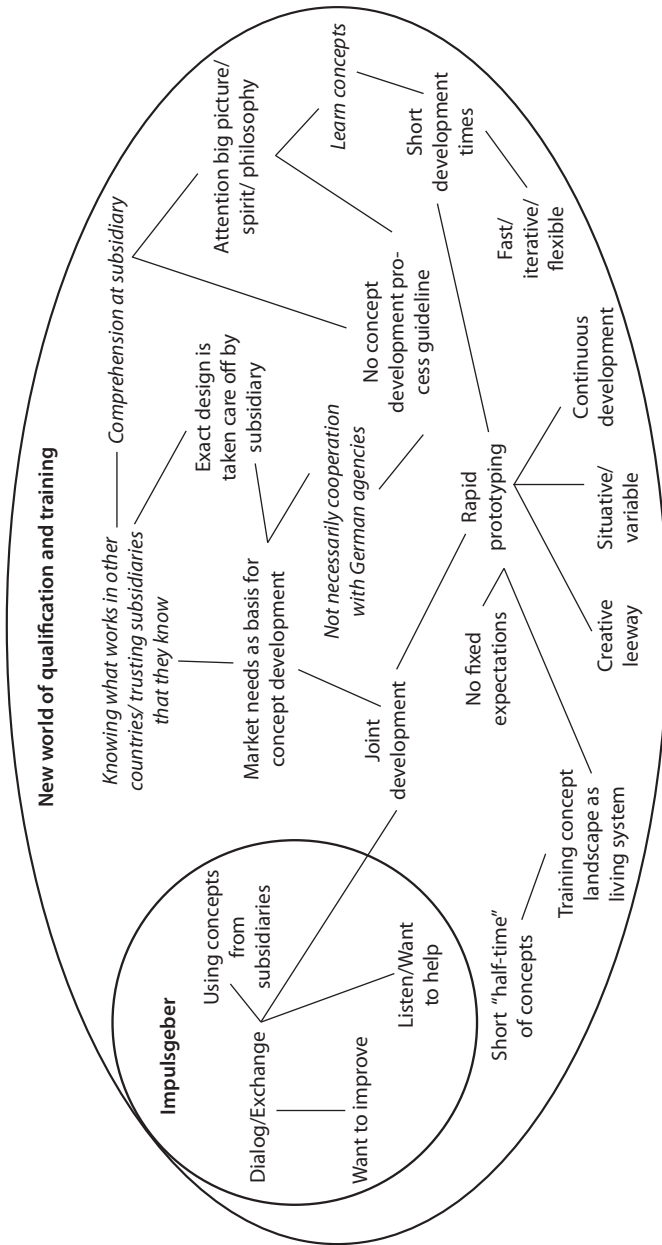


Figure 36 Meaning system of new world of qualification and training



In general, as one can see, the meaning systems around the new world of qualification and training are rather positively connoted while the meanings associated with the old world are more negative. Nevertheless, there have been issues raised such as those described by E5 and E6 which point to the good things about the old world. At the end of the second part of the workshop, E6 summarized that there is a lot that has improved over time, but that he would like to remind all of us to not damn everything about the old world.

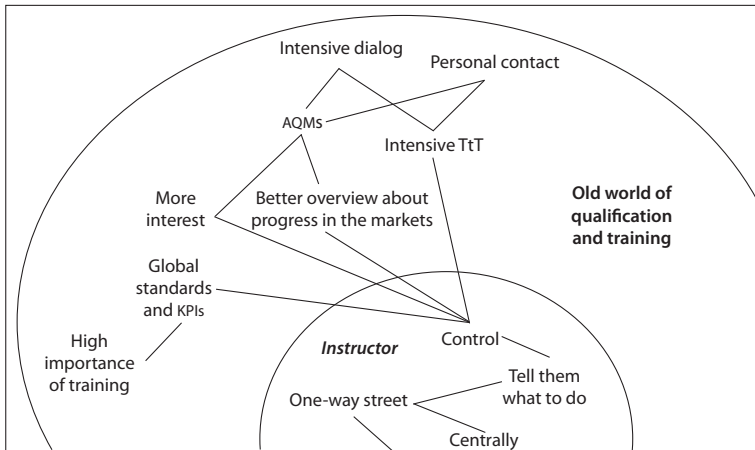


Figure 37 Positive themes associated with the old world of qualification and training

To sum up, thus, even if the intercultural organizational development still is proceeding and despite the fact that the two teams have gained different experiences and have slightly different opinions about the value of the old world, this intervention and its resulting meaning system nevertheless shows that it's not only the mindset that has changed, but, rather, also the department's role and its main practices of developing and transferring concepts have undergone a transformation, mainly by and through the ARE practice transfer. Thus, learnings have somehow been embedded into the organization's practices and routines (Argyris/Schön 1978) – although it still might be a rather fragile embedment thinking of the multiple cultural realities both within the department as well as between the sub-unit and the broader company culture

which is producing the inner conflict described earlier as well as of E5's statement that there is still some "old" in the new world of qualification. The "old", at this stage, is rather ethnocentric – thinking, among others, of the instructor role of the HQ, the central definition of training needs, the central development of concepts in a long, inflexible, linear process and without knowing what really works in other countries – while the "new" already shows strong signs of ethnorelativism and a geocentric strategy of the sub-unit – thinking of the "Impulsgeber"-role, the focus on dialog and exchange, the granted flexibility and creative leeway as well as the attention to the bigger picture of trainings. However, the following sub-chapter will go into even more detail by explicitly looking at the different international strategies.

### **The Fürberger Matrix**

In the third part of the workshop, I guided the discussion on to the strategic orientation of the sub-unit towards subsidiaries with regards to ethnocentrism, polycentrism and geocentrism. As has already become apparent in the previous part on the old and new world of qualification, the old world was characterized by ethnocentrism (one-size-fits all, central developments, one-way communication, control etc.) while the new world was rather rooted in a polycentric or geocentric attitude (dialog and exchange, living system, creative leeway etc.). The subsequent exercise therefore was meant to further investigate into these three different attitudes along the categories proposed by Barmeyer et al. (2012) in their Fürberger Matrix (see table 3). For that, I printed the categories for each attitude on three big posters, pinned it on the wall and asked my colleagues to evaluate each category under each attitude together with me. Before that I shortly introduced them to the notions of ethnocentrism, polycentrism and geocentrism. M1's immediate reaction to the three strategies was: "[The HQ] as a whole is steering its subsidiaries like it is shown by the first picture<sup>11</sup>, one-to-one." Here again, the multiple organizational realities immediately become visible. In the following, we went through all three strategies, marking the applicable dimensions with two differently colored dots, black ones for the HQ as a whole, and

11 The first picture visualized the ethnocentric strategy

red ones for the sub-unit. Using different colors of dots was not what I had originally prepared for. After introducing the participants to the first dimension of the Fürberger Matrix, E6 asked whether our evaluation shall be made for the sub-unit or the HQ as whole, “because that’s a huge difference.” After everyone agreed on that, we started the evaluation using two differently colored dots. Right from the beginning, we all felt that these two different colors are necessary and that we need to differentiate between the two organizational levels. This goes well in line with the various discussions about these conflicting cultural and attitudinal realities before and also some statements made in the individual interviews. Thus, complexity shall not be decreased now through lumping both realities together.

The arrangement of dots in figure 40, however, shows a very simple picture of the self-evaluation we made. It provides a first good overview over the differences between the HQ’s and the sub-unit’s strategic orientation towards international subsidiaries: The black HQ dots are gathered on the left hand side, with a strong emphasis on ethnocentrism and not covering geocentrism at all, while the red sub-unit dots are spread across all three strategies, although indicating a focus on polycentricism and a tendency towards geocentrism. This visualization, of course, stays a simplified portrayal of reality. I will therefore go through the discussions that emerged during our evaluation.

|                                       | Ethnocentrism | Polycentrism | Geocentrism |
|---------------------------------------|---------------|--------------|-------------|
| Identity                              | ●             |              | ●           |
| Strategy, policy, programs            | ●             | ● ●          |             |
| Organizational structure              | ●             | ● ●          |             |
| People, groups, climate               | ●             | ● ●          | ●           |
| Individual functions and institutions | ● ●           | ●            | ● →         |
| Procedures, processes                 | ● ●           | ● ●          | ●           |
| Physical-material world               | ●             | ● ●          | ●           |

Figure 38 The Fürberger Matrix applied to the HQ's (black dots) and sub-unit's (grey dots) strategic orientation and attitude (Fürberger Matrix adapted from Barmeyer 2018, p. 278ff)

### Identity

When it comes to the dimension of identity, i.e. the values and principles lived within the multinational organization (Barmeyer 2018), everyone agrees in that the HQ's attitude is ethnocentric. E2 states that it is legitimate for the HQ to act ethnocentrically in this regard as its main goal is to sell cars and mobility solutions worldwide. By contrast, at the sub-unit, it's all about people and their further development which is why values and principles are rather developed by subsidiaries themselves or even emerge through the interaction with the sub-unit – depending on the specific subsidiary: “We are in between polycentrism and geocentrism. There are big subsidiaries who work independently, but we also see that we cooperate more closely with other subsidiaries” (M1, HQ). Here, he refers to the cooperation between the sub-unit and the subsidiaries and not specifically to values and principles. I point it out and indicate that collaboration will be the topic under discussion later within another dimension of the Matrix.

In a retrospective, I understand that not everyone understood what is meant with values and principles and recognize that I could have guided them more in this regard.

However, everyone agrees in placing a black HQ dot at ethnocentrism and a red sub-unit dot in the middle between polycentrism and geocentrism.

### **Strategy, policy, programs**

The next dimension refers to strategies and programs which either are dictated by the HQ, developed by subsidiaries themselves or in a joint, interactive negotiation (Barmeyer 2018). I point to training concepts as an example for a program at our sub-unit. M1 immediately refers to sales targets that are defined by the HQ and passed on to each respective subsidiary. Also, as E2 adds, the new brand strategy that places more emphasis on the customer as the focal point of all action is defined by the HQ and spread across the globe. On the sub-unit level, the ARE practice was equally initiated centrally, i.e. by the sub-unit. I asked how the situation is for other training practices apart from ARE, i.e. how it is in case of the “normal” training business that is mainly driven by E5 and E6: “The markets do their own stuff, but based on our ideas. That there is developed something together does not happen very often. But you could also say that each market does whatever it wants.” M1 agrees in this polycentric tendency expressed by E6:

“There definitively are different ARE strategies. The Germans deal with it very differently than the Spanish – in accordance with certain framework conditions. The framework is, let’s say, the basic concept of ARE. That also accounts for the other training programs, that is, we are not at the very left.<sup>12</sup>”

The dots here are placed to ethnocentrism and polycentrism in the case of the HQ, and polycentrism in the case of the subsidiary.

### **Organizational structure**

When it comes to the organizational structure of the multinational organization, it’s about the extent to which structures are global, local or interconnected and how key functions are distributed across the

12 I.e. ethnocentric

company (Barmeyer 2018). Here, everyone immediately agrees in that the organizational structure of subsidiaries is a copy of the HQ's structure – although there might be slight variations as most subsidiaries are either focused on production or retail, a very small number on research and innovation. Key functions at subsidiaries are staffed by local managers, although “the director of [the US subsidiary] wouldn't be there if our CEO wouldn't have agreed on that” (M1, HQ). Thus, in some cases, staffing decisions are influenced by the HQ. At the same time, managers and high potential employees are dispatched as expatriates to subsidiaries to fulfill key functions. E7 summarizes the HQ expatriation motivation as follows:

“That's twofold. On the one hand, in the past, we certainly thought that if people move there they transfer a lot from our spirit. In the meantime, this is not the motivation anymore. Because on the other hand, it's about showing loyalty and ability for suffering. You want to make a career? Then you need to go to China for three years. Show us your ability to suffer. Show us how big your loyalty to the company is. That is, I think we indeed have understood that a Chinese CEO can move more in China than Germans. And still, we will always have a dual leadership or something like that because of these reasons.”

China, in this case, is the country that is most frequented by expatriates. I myself have met a lot of people who went to the Chinese subsidiary just in order to come back as managers or get access to the management development path in order to become one. Thus, in this case, although “local staffing policies is a clear strategy of the HQ” (M1, HQ), these local staffing decisions potentially are influenced by the HQ and are supplemented by German expatriates. This also explains the location of the two black dots in the Matrix. When I explain what it would mean for the organizational structure of the HQ as a whole in a geocentric setting, like locating key functions where they are most valuable, M1's reaction is: “We are very far from that.” On the sub-unit level, an evaluation results to be difficult. Subsidiary training departments are very heterogeneous, sometimes comparable with the sub-unit's structure in the case of very big subsidiaries, sometimes not comparable at

all, in the case of small subsidiaries. This is why we decide to place a red dot in the middle.

### **People, groups, climate**

This dimension is separated into three different focal points: Leadership and communication culture, principles of collaboration and intercultural competence (Barmeyer 2018). The decision is immediately taken in the HQ's case: While the leadership and communication culture is considered to be rather polycentric, principles of collaboration are directed by the HQ and intercultural competence is only relevant for subsidiaries as they are the ones needing to adapt. The annual 360° feedback is an example for an ethnocentric leadership and communication culture as it is mandatory for both HQ and subsidiaries without allowing for adaptations: It even has the same German name all over the world. The unilateral adaptation from the part of subsidiaries is getting visible, for instance, in the German language skills of a lot of subsidiary employees and managers. At more than one occasion when attending the international training conferences I was surprised to hear about the German language skills of people. In the sub-unit's case, the workshop participants all agree in that leadership and communication culture is polycentric with regards to the training business, whereas they consider our collaboration with international subsidiaries geocentric. M1 (HQ) states: "That's what we live at its finest: Cultural differences are complementary and enriching. That's absolutely true." E6 adds that also in terms of intercultural competence, the geocentric definition is true for the sub-unit and that mutual adaptation or intercultural competence demonstrated by all interacting parties is important. Thus, again, two red dots are placed on the polycentric and geocentric attitude.

### **Individual functions and institutions**

This dimension refers to company-wide projects that are either steered centrally, locally or in cooperation (Barmeyer 2018). Here, the discussion is quickly done for the sub-unit's case: Projects related to training are mainly initiated centrally, but are steered by the subsidiary. In this regard, the Fürberger Matrix does not allow a clear, differentiated mapping. Therefore, two red dots are placed again on ethnocentrism and

polycentrism. On a headquarter level, M1 names one global, company-wide project as an example, where “we sent people around the world and said: ‘Dear national sales company, here we are coming with two people, that’s the topic, that’s the goal. Find a meeting room, provide some people, we tell you how it will work.’ That’s pure centralism.” All others agree in that there probably is no company-wide project which is not characterized by ethnocentrism: “I don’t think that our culture provides for anything else” (E7, HQ). For instance, E7 states that each subsidiary eventually has its own marketing spot, but the decision which cars need to be marketed more – due to poor sales figures, for instance – is taken centrally at the HQ. E3 refers to the newly built production site in Mexico as another example for a central initiation of projects. Also, the national sales company in China is steered in a German-Chinese tandem – “whereas this joint venture was not born because we thought that’s cool but because there wouldn’t have been any other way for market entry” (E3, HQ). E3 further points out that international markets hardly are integrated in the high-level decision bodies of the company. After therefore placing the black HQ-dot to ethnocentrism, I guided the discussion back to the sub-unit’s dealing with the initiation and steering of projects. E6 again states that polycentrism is best describing the “normal” training business. M1 throws in that ethnocentrism per se doesn’t necessarily need to be a bad thing – in the case of ARE, the central steering of best practice exchange is key. The sub-unit team’s ethnocentrism with regard to ARE was also getting visible in the team’s enthusiasm about the decision for rollout taken by the member of the board of management for marketing and sales. E7 states: “At the beginning, we felt very comfortable saying: That’s decided by [name of the member of the board for sales and marketing]! Saying that made us feel really good.” E3 adds to that: “Yes, because by doing that we were able to be in line with the dominating organizational culture which is characterized by this [ethnocentric] attitude and used this productively as a bridge into another dimension<sup>13</sup>”. Thus, for her, demonstrating ethnocentrism with regard to this particular situation was used as a culturally accepted starting point from which the team was able to move on to a

13 I.e. geocentric strategy



rather new way of engaging with subsidiaries. Here, E3 again demonstrates her capabilities of thinking in both worlds simultaneously and finding a way to – how she puts it – *bridge* them to ultimately reach a state everyone is fine with although it is highly different from the normal and known ways of operating.

M1 further states that the sub-unit is not that far from a geocentric initiation and steering of projects. E7 agrees:

„I believe that, too! By the way, I see our future exactly here<sup>14</sup>! Because, sooner or later, on a subsidiary level, there will be less human resources available for training. But that doesn't mean that the necessity of the topic is gone as well. And we will distribute resources globally and maybe, this makes it really special because the interculturality we are speaking about right now will be triggered enormously.”

This is why red dots are distributed across all three attitudes, the geocentric one having a little arrow which is indicating the direction of development as this dot has not yet completely reached the geocentric field but points to small tendencies and the willingness to do so.

### **Procedures, processes**

This dimension is again composed of three categories: working processes that can be centralized, local or optimized through exchange in the case of the geocentric attitude, information and knowledge management which might equally be centralized, localized or globally shared and innovation for which accounts the same (Barmeyer 2018). At the HQ level, everyone agrees in that ethnocentric and polycentric attitudes are simultaneously prevailing. The HQ sets a lot of standards for processes, but subsidiaries do have own processes as well. Similarly, there are central solutions for information knowledge management but at the same time, a number of subsidiaries do have their own versions. A lot of innovation happens centrally, for instance, when it comes to the development of engines, but also locally:

“Of course, there is a lot of local knowledge. By the way, there is also a lot of knowledge we don’t have, simply because it’s local, we couldn’t have that knowledge. And there is a lot of decentralized innovation happening. The IT strategy of the US in sales, for instance, is far more ahead than ours. The same accounts for China. That’s decentralized, that’s where they are more ahead than us. For me, the markets are more innovative.” (M1, HQ)

Obviously, as far as the sub-unit members are able to judge the situation on a HQ level, there is a lot happening in parallel with regard to innovation and knowledge management both centrally and locally. Therefore, we allocated the black dots to both ethnocentrism and polycentrism. In the case of the ARE transfer, as E2 explains and is agreed on by the others, the sub-unit acted ethnocentrically insofar as the team collected the ideas and local interpretations centrally in order to share it back again with the subsidiaries. Thus, in this regard, information and knowledge management is centralized which, in this case, is found to be “positive” (E2). In parallel, also with regard to training, subsidiaries act autonomously, thus, local innovation and knowledge management takes place. E3 states: “I wouldn’t know where to quickly look up how a classical Spanish training concept looks like. It is not yet a reciprocal process.” On the other hand, the ARE team has set up an online platform where subsidiaries can exchange on the transfer of ARE, post ideas or share questions. Thus, although initiated centrally, the technical foundation for a geocentric approach to innovation and knowledge management is laid but is not yet made real use of. At the same time, the Qualification summit which will be a topic of discussion in the following chapter, for instance, is one example where innovations are openly shared and allowed to be used by everyone. Also, the lessons learned workshops which took place together with the first pilot markets is aiming for an optimization of processes, in this case, the ARE concept and all its related processes, roles, etc., just like it is described by the Fürberger Matrix. Thus, again, even within the same sub-unit, a clear evaluation of the international strategies is not possible. Red dots can therefore be found at each of them.

### **Physical-material world**

The last dimension of the Fürberger Matrix is describing the centralization or localization of systems, standards and work places, or the combination of being locally usefulness and usable globally respectively (Barmeyer 2018). On a HQ level, a clear ethnocentric approach is the globally relevant standard of how a dealership building should look like. At the same time, small adaptations are possible – dealerships in the Middle East, for instance, have different kinds of floors in order to prevent sand sticking or Chinese dealership very often serve lunch and tea or offer massages which requires different facilities. Also, subsidiary office buildings are highly diverse, demonstrating a polycentric strategy. Systems are localized as well, for instance, the IT systems for dealership management or training course management. On the geocentric side, the ARE practice again is an example: Here, after the pilots and lessons learned workshops, a smallest common denominator was defined in terms of its physical aspects which both ensure its memorability and commonality and its openness and flexibility. Therefore, everyone agrees in putting the black dots to both ethnocentrism and polycentricism, the red ones to polycentricism and geocentrism.

After jointly categorizing the HQ's and sub-unit's strategic orientations, I explained that this was, in my opinion, a good task to reflect on one's own position, to become conscious about it. Barmeyer (2018) considers the Fürberger Matrix as a diagnostic tool which allows to determine the starting point from which an organization can then be accompanied by specific interventions on its way towards higher intercultural competence and more efficient intercultural behavior. The participants agree and propose to do the same diagnosis with the whole company, curious to see the resulting picture:

“I consider it as highly useful to go through that and trigger the process of consciousness raising, i.e. enlightenment in its best sense. That's a huge step to recognize, okay, these are the strategies, where am I and where are we, what are the differences. To make that visible and transparent for the whole company would be really valuable.” (E3, HQ)

The joint evaluation has shown that, first of all, one needs to differentiate between the different organizational layers: Right from the beginning, there was the need to distinguish between the HQ as a whole and the sub-unit which is why two different colored dots were used. Second, as a consequence, it is not always that easy to evaluate the HQ's position due to a lack of overview over concrete HQ actions and underlying strategies which in turn might be marked by different organizational culture realities. In order to solve that issue, further investigations and discussions with other HQ sub-units and higher level management would have been necessary. Third, equally, some dimensions of the Fürberger Matrix were not really applicable for the sub-unit, such as the organizational structure. In this regard, the Matrix as a whole is better usable on a broader company level. And fourth, as one can see from the distribution of dots across more than one strategy within the same dimension, the lines between the strategies are often not clearly set or, in other words, a clear mapping is sometimes not possible like it has become apparent in the dimension of individual functions and institutions and procedures and processes.

However, the feedback provided by the sub-unit team members shows that this task was beneficial for situating oneself. The probably most reflective conclusion is drawn by E3:

“I was just thinking... Yes, we are [the HQ], but we are different sub-cultures. And the maturity level of each organizational unit is different. All that together will hopefully develop further and grow, but that means nevertheless, that everything on that wall is existing in parallel.”

She names three important topics here: First, she again refers to the different organizational cultures that are existing in parallel within the company which was recognized previously at several occasions. Second, she refers to the “maturity level” of sub-units and their “further development” which indicates that for her, the three strategic attitudes can be understood as development lines a company can go through – having the clear vision of “hopefully” reaching geocentricity. And third, from these two realizations she further reasons that all three attitudes are

existing in parallel within the same company. This is very much in line with what Perlmutter (1969) theorized about a company's EPG profile.

What this task also revealed were several additional insights about the power relations between the HQ or sub-unit and the subsidiaries (Ferner et al. 2012) and the latter's weight and voice (Bouquet/Birkinshaw 2008). For instance, it became clear that the intensity of cooperation is depending on certain characteristics of the subsidiary: Bigger subsidiaries, for instance, seem to work more independently. The second category of strategy, policy and programs has revealed, that the HQ has much power over processes as it defines sales targets or brand strategies centrally, for instance, but the sub-unit does not possess much power in this regard as "subsidiaries do whatever they want" (E6, HQ). The discussions about the individual functions and institutions additionally show how much power over resources and processes the HQ has, at it is the one which is able to decide where to build production facilities, for instance.

The diagnosis we undertook by going through the three different strategic orientations provides of course only with one perspective on a way of interaction where more parties are involved. Thus, this diagnosis is only depicting our self-awareness and is not reconciled with the perception of international subsidiaries. For instance, the sub-unit's perception of considering cultural differences as complementary and enriching might or might not be felt by subsidiaries – this evaluation is only referring to one side of the coin. Similarly, like it was already addressed in the first part of the workshop, the fact that HQ representatives suddenly adapt to subsidiary representatives behavior probably isn't what they already have experienced that often. Thus, the subsidiary training manager's evaluation of the perceived current importance of intercultural competence on both HQ and subsidiary side might look completely different. However, there are some small signs that subsidiaries sense the sub-units change in attitude. For instance, the Spanish transfer responsible commented that through ARE, she got to know our "human side", because we "always have been there to support" and that the dedicated amount of support was not usual in the past. Additionally, her boss once mentioned in a meeting, that he feels that the HQ is more and more open for alternative, local opinions. Another subsidiary

view will be provided in chapter 7.2.2.1 when the French ARE transfer responsible states that the HQ sub-unit had become more confident in the subsidiary and granted more freedom. But still, the diagnosis we undertook only accounts for one involved party's perspective.

From this diagnosis of the current state on, I invited the sub-unit members for the last short part of the workshop to think ahead and visualize their individual future of the sub-unit's collaboration with international markets.

### **The vision**

I asked them to individually answer the question of "Where do we want to go in terms of international collaboration?" graphically. Half an hour later, we collected our visualizations on a wall and everyone shared his thoughts about his individual vision. On almost each paper, a globe was drawn and numerous connecting arrows between countries. The words "exchange", "together" and "mutual" are frequently mentioned in the presentations of the visions. E4, for instance, highlights the umbrella of the brand under which exchange happens and "middle ways" are found in terms of concept development. E2 also highlights the exchange between subsidiaries – in the ideal world, for him, the HQ is not necessary anymore in order to connect subsidiaries. In this ideal state, subsidiaries support each other by themselves, without the HQ being the one who, for instance, invites for a training conference in order to make this exchange happen. E1 metaphorically speaks of different maps or world views when referring to the different, interacting cultures:

"The binding element of these different world views is the company's brand and the joint goal is to move things forward for the brand. And within this brand we have a lot of great opportunities to align our maps, to exchange, to learn from each other and to become conscious about the fact that the brand is filled with life very differently across these different maps." (E1, HQ)

Similarly, E6 speaks of the common language of the brand that unites the different parties which at the same time sounds a little bit different around the globe. M1 specifically refers to ARE in his vision in that it

shall be implemented however it fits best to the local market but that, at the same time, everyone is connected to everyone, aiming for innovation, co-creation, synergies and best practices exchange. E3 visualized differently looking people who join hands around a globe:

“They are united by our brand’s purpose. Innovation and ideas emerge at the most different edges and places and we manage to keep it running, the whole thing turns, moves, we are all connected and no matter where the innovation comes from, we always integrate it and make it productive. Consequent, permanent, connected, exchange, agile, eye-level, with fun and spirit, innovative... That’s my vision.” (E3, HQ)

What is common to almost all the individual visions is the common ground, the unifying element that forms the basis for the appreciation of diversity, exchange, joint actions and mutual learning. The resulting picture is a very homogenous one, indicating that the sub-unit as a whole is on an agreed way of heading towards a future geocentric state.

### 7.2.1.3 Summary

In order to sum up this first time period of learning and reflection, the following main insights can be highlighted: First, the re-analysis of the interviews has shown that the newness of the way the ARE practice was transferred, the possibility to directly observe the process and outcomes of the transfer on recipient unit level as well as the experience of failures and successes affected the transfer team’s learning process. That learning was possible is also thanks to individual characteristics of the people involved, such as the individual intercultural competence developed from continuous exposure to intercultural situations during the daily work, openness and interest in other cultures, as well as a general orientation to change like it is, for instance, clearly displayed by E3. That there is already intercultural competence developed within the team was also shown by the first part of the intercultural workshop: Openness, flexibility and empathy as well as the practical expression of these affective dimensions in actual behaviors like listening, granting adaptations and showing interest into the other person’s culture seem to be already practiced by the team members. Merely the cognitive dimension, accord-

ing to them, could be better developed by acquiring more conscious knowledge about one's own and the other's culture. Additionally, on a collective level, the emerging ARE spirit simultaneously fostered this learning process and simultaneously is the result of it. Collective reflections like it was pursued by the lessons learned workshops as well as my own workshop intervention additionally helped becoming aware of one's own attitudes and behaviors as a basis for change. Thus, what Bartel-Radic (2006) describes as powerful conditions for developing intercultural competence, namely experiencing intercultural interactions practically, a desire to learn, positive emotions and self-reflections, is what also in this case helped developing an ethnorelativistic mindset by an even higher intercultural competence.

The learning itself primarily consists of the increased awareness of the heterogeneity and diversity of cultures. On an organizational level, this learning on individual level resulted, first, into an adaptation of the transfer strategy by flexibilizing the ARE practice and allowing for local adaptations on a single-loop learning level, and second, into developing positive emotions towards the resulting diversity of ideas and the active search and willingness for this diversity to happen as well as into a team or project culture in a double-loop learning sense. Second, the re-analysis also has shown that there is still development needed in order to reach full ethnorelativism and a geocentric attitude – not just within the sub-unit but also within the broader HQ. Third, both the interviews as well as the workshop illustrate the attitude of the sub-unit's leader M1. He has shown a lot of interest into the topic of culture and interculturality, demonstrated his intercultural competence and his willingness to learn and gain deeper knowledge about culture – which is essential especially during the development of an organization towards an interculturally competent one (Barmeyer/Mayrhofer 2016). The workshop intervention, fourth, primarily revealed the existence of multiple cultures and therefore multiple strategies and attitudes in dealing with international subsidiaries within the HQ. That this tension is felt even more by the team members who haven't been involved in the practice transfer has also been discussed – which adds another cultural reality to the equation. Also during the discussions about the old and new world of qualification, the different development stages of the



two teams become visible. Fifth, the juxtaposition of the characteristics of the old and the new world of qualification helped gaining a clearer picture of the “starting point” of the intercultural OD as well as the current status and allows to term the old world a rather ethnocentric one, while the new world shows clear signs of geocentricity and ethnorelativism. The joint evaluation of the Fürberger Matrix, then, went into more detail regarding the different international strategies and once more revealed the co-existence of different attitudes and strategies within the same organization. And last but not least, the visualization of the future state of the sub-unit’s international collaboration showed a clear and homogeneous tendency towards even higher ethnorelativism and geocentricity.

From a methodological stance, the workshop can be considered both as a space for reflection as well as an action research intervention targeted at the further intercultural organizational development of the sub-unit. It can also be considered as a deliberate initiative that potentially triggers an organizational unit to move more and more to an ethnorelativistic attitude (Taylor/Osland 2011). Drawing on Senge’s (1990) five disciplines of the learning organization, the workshop helped activating respectively was able to retrace all of them: First, *personal mastery*, i.e. that workshop participants are committed to their lifelong learning becomes apparent simply by the fact that discussions were so lively and engaged and brought many more topics to the surface than I had planned for, that my theoretical inputs were appreciated, further discussed and enriched with own experiences and that some people openly expressed wanting to know more about, for instance, own cultural specifics (E2; M1) or the theory about culture in general (E3). Second, the workshop contributed to becoming aware of one’s *mental models*, i.e. the assumptions and pictures of how the department makes sense of its actions and tasks, by diving into its roles and practices in the past compared to those in the present as well as by reflecting on and becoming aware of the own team and sub-unit culture which is conflicting with the broader HQ culture. Third, a *shared vision* emerged during the last workshop activity as the individual visions were very much aligned, the leader’s vision being one of many. A shared vision which is not dictated by the management makes a team wanting to learn and

outperform. Similarly, within an appreciative inquiry, envisioning an ideal, future state is part of the second dream phase which is seen as fostering change and a positive attitude towards it (Cooperrider/Godwin 2012). Fourth, team learning was fostered by the workshop as the whole sub-unit team was thinking together, dialoging and reflecting jointly on several topics related to its intercultural OD. And fifth, *systems thinking*, the overarching discipline, is mastered by the sub-unit members. This becomes apparent, for instance, by the reflection of own approaches towards subsidiaries which are often not in line and conflicting with the HQ ones which in turn provokes an inner conflict and also might have a certain impact on subsidiaries. Another example for demonstrated systems thinking are E3's reflections about the simultaneity of international strategies across organizational units. Additionally, looking at Dixon's (2019) learning cycle, both the workshop as well as the reflections that happened before that contribute to the collection of information, its integration and interpretation by dialoging as a team and questioning current assumptions which, supplemented by the cycle's last step of acting on the interpreted information, constitute organizational learning. The workshop therefore contributes to the disciplines of a learning organization and can be considered as an important reflection space and intervention for the sub-unit's further learning and development process (French/Bell 1994). Apart from that, the actual development of increasing ethnorelativism and considering culture more and more as a resource and value-adding asset became visible and was formulated for the first time collectively and in such a condensed manner. Thus, the workshop not only further fostered this development but also made it tangible for the team and for me as a researcher by, for instance, contrasting the sub-unit's roles, approaches and tasks of today versus the past. Similarly, the joint revision of the Fürberger Matrix allowed to reflect on own attitudes and make them visible, also in relation to the HQ as a whole. This reflection and questioning of assumptions and values held by the team constitutes a powerful means for double-loop learning by moving these values towards even higher ethnorelativism (Bartel-Radic 2013). Additionally, the workshop also allowed to depict the status quo of the intercultural competence of the sub-unit. All in all, thus, as individual intercultural competences constitute the orga-

nizational unit's intercultural competence as well as practices and roles already have been adapted (Bartel-Radic 2013), the intercultural OD can be considered as already far developed.

## 7.2.2 Consolidation and internationalization

It's of course a good thing to talk about the HQ's or the HQ sub-unit's strategic orientation towards its international subsidiaries. It's necessary, in order to develop further, to reflect on past and current actions and envision some future state of international collaboration. However, this is of course only one part of the coin. On the first international training conference I attended in 2017, the broader unit's leader ended his opening speech with the appeal to put all resources together as a global training community and co-create training concepts together. He openly invited subsidiary training managers to approach the unit's and sub-unit's members whenever they have an idea for a co-creative training concept development project. In the following – among more than 40 participating subsidiaries, only one training manager, the Argentinian one, reacted to this appeal. Also, at some occasions during the intercultural workshop, the necessity of developing further and demonstrating intercultural competence on *both sides*, i.e. the HQ and subsidiaries, is highlighted. E6, for instance, states that “one may be even so empathic, open and full of respect, when you face a culture, an organization or a person who just don't want that, you are lost.” The concrete subsidiary, E6 is referring to here, is the US one. E3 shares a similar experience with the US subsidiary:

“I sense a murmur when I think of the US. For me, it wasn't about different national cultures, but the organization just blocked. We weren't able to find a common language and something stayed obscure, it was not open from both sides... We have signaled openness and willingness but we haven't reached a mutual openness.”

Thus, like it also was highlighted at the end of chapter 7.2.1.3, the self-perception of the HQ sub-unit as well as its further development in terms of reaching ethnorelativism is only one side of the coin. The mere will-

ingness to cooperate geocentrically, the mere appeal for more co-creative international collaboration or the fact that the sub-unit changed its attitude towards the subsidiaries does not automatically mean that geocentricity in international actions is born. So far, the learnings and the reflections on intercultural competence and the own further development have only taken place at the HQ level. Although this development has in parts manifested itself in the sub-unit's practices and routines (Argyris/Schön 1978) as it was shown in chapter 7.2.1.2, when it comes to international collaboration, new supporting practices and structures have not yet emerged. Thus, after recognizing the development of my sub-unit and while supporting this development even more through, for instance, offering spaces for collective reflections, I started to think about how the intercultural organizational development may be "extended" to the subsidiaries and how subsidiary actors can actively become involved and equal partners in the training organizations intercultural organizational development (Barmeyer 2010) – not least for the sake of consolidating the ongoing intercultural OD within the sub-unit.

### 7.2.2.1 Intervention II: The Qualification Summit

One first opportunity for action arose shortly after the intercultural workshop took place, when the eight biggest and most important subsidiaries were invited to Germany for a training conference called Qualification Summit. On this summit, various topics were planned to be discussed and shared with subsidiaries, among them the transfer of ARE. I volunteered together with E2 to take over the responsibility of designing the informative agenda item about the current state and future directions of the ARE practice. I quickly proposed to break a very traditional pattern of these kinds of conferences: It's mostly HQ representatives being on stage and sharing information. As five among the eight participating countries were engaged in the transfer of ARE, I proposed to let those people talk who are most directly affected: The training managers who were responsible for the transfer into their respective countries. M1 and the broader unit's leader immediately agreed on this idea. For the design of the topic, I proposed to leave as much creative leeway as possible and only define one central question or task as well as the framework for presenting the answer. In the end, we asked the

subsidiary training managers to prepare a Pecha Kucha<sup>15</sup> presentation in order to share their local “ARE story”.

Everybody at the sub-unit liked this idea. I also asked the Spanish transfer responsible if she thinks that that’s a good idea and she did as well. That’s why we asked all five candidates if they could imagine to prepare such a presentation for this conference and all of them agreed. E2 and I also prepared a presentation for two reasons: First, we wanted to demonstrate eye-level and togetherness by being on stage together. And second, I wanted to use the opportunity to share our HQ-sided story of ARE, i.e. the story about the organizational learning process and development we went through. I wanted to show that we have become more open, more willing to really cooperate on eye-level and learn from subsidiaries. As an action researcher, I saw it as an opportunity to demonstrate once more, by reference to a real and tangible example, that our attitude changed and that we are serious in proceeding to a geocentric level – together with our international training partners. I wanted to share our learning history to a broader public in order to promote it and potentially spread these learnings further (Roth/Bradbury 2008).

The whole presentation went really well. Except for the Canadian and German training manager, all adhered to the Pecha Kucha format in terms of the length of the presentation and the usage of pictures primarily. One could go into detail about the different styles of presenting and the different points highlighted from a culture comparison point of view, but that’s not the main goal here.

However, one statement from the French presentation shall be analyzed as it corresponds well with the organizational development the HQ sub-unit has gone and still is going through: The French training manager stated: “With ARE, [the HQ] surprised us with a new method, a new way of working, [the HQ] made things easier with having more confidence in us, with giving us more freedom and it connects us with other countries.” A note is important to be made here before analyzing

15 Pecha Kucha is Japanese for “continuously chatting”. In this context, it describes a presentation format consisting of 20 presentation slides with as little text and figures as possible for which the presenter has 20 seconds each to explain. Telling a story by using pictures is the underlying idea of this format while reducing the given information to its very core. For more information see: <https://www.wissenschaftskommunikation.de/format/pecha-kucha/>

ing this statement in more detail: At that time, *surprising*, *simplifying* and *connecting* were the brand values which refer to the way the brand wanted to interact with and be for customers. Thus, on the one hand, the French transfer responsible wanted to mention these brand values in his presentation – maybe in order to show that he had internalized them – but on the other hand, he decided to relate these values with the new kind of behavior demonstrated by the HQ during the transfer. We didn't predetermine anything regarding the content of the Pecha Kucha presentations, that is, the French transfer responsible found it important to highlight how new the practice was for him in a positive way, how good he felt about having more freedom and sensing more confidence as well as the increased connection to other countries through ARE. Nobody asked him to say that, nor did he see the HQ's presentation beforehand where E2 and I retraced our intercultural development and placed a big emphasis on our willingness to cooperate and foster mutual learning more and on being on eye-level. That is, he also didn't make this statement because of some sort of social desirability. That means that the different way, the HQ ARE team approached the training managers with within the transfer, was felt “on the other side” and was positively reacted to – at least in France.

What is common to all of the presentations is the enthusiasm and openness to share their stories and learnings with other subsidiaries and the HQ as well as the local touch each of the presentation had: With no exception, the presenters explained at one or several occasions the respective local specifics with saying, for instance, “well, we are in Spain” or “you know, in Canada it's like...”. And this was exactly what I was hoping for: I was hoping for diversity in pictures, approaches, emotions and examples in order to make transparent – to both HQ and subsidiary representatives – how innovative and creative subsidiaries can be and what solutions are born if they are allowed or actively asked to be. After this session, I received a lot of positive feedback from both presenters and people from the audience, especially about the “innovativeness” and “freshness” of this agenda item. With designing the session like that, I wanted to make others, who are not yet or not directly involved in the practice transfer of ARE, experience how it is and how enriching, funny, emotional, human it can be to listen to people who really

are working with the practice. During the transfer of ARE so far, we experienced what a big “currency” (E1, HQ) these stories from all over the world are – for both other subsidiaries and HQ representatives. By making storytelling the method of presenting on a bigger conference, a broader audience gains access to these stories. That way, the presenters from both subsidiaries and HQ basically created a learning history by summarizing their experiences and making them accessible for more people (Roth/Bradbury 2008). This accounts especially for our, HQ-sided presentation of the ARE story, as this story specifically retraced the department’s intercultural learning process. By summarizing the learnings and our development following on that in a presentation, we basically produced a learning history that we were able to share with other, until then uninvolved stakeholders. At the same time the way of designing this agenda item is new for these kind of conferences – before that, I only experienced that subsidiary representatives were invited to share their opinions or do group work and present the group’s results afterwards, i.e. the HQ-subsidiary relationship was more of a teacher-pupil kind of relationship before. This time, I was able to show that a joint creation and design of a conference topic is possible and good. Thus, one could name the configuration of this slot geocentric in that HQ and subsidiaries both contributed their individual views and experiences on and with ARE to the common, shared ground of wanting to keep dealerships competitive by making them more customer-centric. It would have been even more geocentric when we would have thought about and negotiated the concrete design of the presentations together – in that case, the HQ proposed to do a Pecha Kucha and nobody openly disagreed. It nevertheless was a first step towards a new practice of the design and setup of international conferences.

I’m not able to evaluate how this intervention contributed to the further intercultural organizational development of the sub-unit and the training departments of the subsidiaries. I think I wanted to set an example of how an alternative way of interaction on conferences could look like. I wanted to show that everyone can benefit from a different approach and by doing that potentially trigger the willingness to change this current practice of conducting

international training conferences. However, I am not sure whether this really led to reflection on the part of the audience. But, for sure, it was another grist for the ARE team's mill and its approach to the ARE transfer and interaction within international training departments.

### 7.2.2.2 Digression: The beginning of the turnaround

So far, the intercultural organizational development of the HQ sub-unit has evolved more and more and – as has been shown by the first intervention – is already far developed: Experiences were made during the international practice transfer. The experiences were made in intercultural situations, were new and directly observable and involved both failure and success – characteristics that contribute well to learning (Argote 2013; Bartel-Radic 2013; Taylor/Osland 2011). These experiences were reflected individually in the interviews I conducted and collectively in the lessons learned workshops. The learning processes and the individual and joint reflections on them form the very basis of the sub-unit's organizational development (Gairing 2017). While the transfer strategy was adapted by granting more local adaptations in the sense of a single-loop organizational learning, new attitudes, roles and practices in the sense of a double-loop organizational learning (Bartel-Radic 2013) become apparent, too, in the reflections on the old and new world of qualification during the intercultural workshop – a primary condition for making the learnings “stick” in the organization and a central part of the intercultural OD (Barmeyer/Mayrhofer 2016). Apart from offering spaces for reflections during interviews and in the intercultural workshop, as an action researcher, I'm additionally fostering the sub-unit's development through sending out science snacks, how I named it, i.e. short emails with interesting information from the scientific literature I have read. I thus tried to further contribute to the team's cognitive dimension of intercultural competence. For instance, one science snack summarized the paper of Dickmann (2003) called “Implementing German HRM abroad: desirable, feasible, successful?” More specifically, the science snack focused on the German business system characteristics which influence the German way of thinking of



HR management, such as long-termism or its developmental orientation. Even a year after I sent out this science snack, some colleagues still refer to it when discussing whether to really “over engineer” things and making them bigger and bigger or better not to overwhelm subsidiaries with the “German steamroller” (Barmeyer 2018). Moreover, I tried to apply my intercultural view on things whenever I sensed that in a particular situation, colleagues are going back to old habits or are thinking ethnocentrically. For instance, during a meeting where we discussed a presentation (internal document, sub-unit overview, January 2019) that was meant to give an overview over our sub-unit and its tasks, the overall goal of the sub-unit was formulated like this: “We support our global retail organization with the right tools, programs and strategic ideas for selection, training and development of dealership staff in order to deliver a customer-centric retail experience.” When discussing this particular sentence, I immediately shared my feeling that speaking of “the right tools” is not what we really want to do and that our tools are maybe not the *right* ones for everybody. I remember the eyes of my colleagues growing bigger, like if they thought “Oh my god, she’s right, what were I thinking?” E5 said: “It’s so good that you have this special perspective!” In the end, we removed the word “right” without any replacement.

These are just two small examples of my interventions apart from the ones that already were discussed. All in all, in May 2019, I felt that the intercultural development of the sub-unit is on a good track and that my ongoing smaller and bigger interventions are bearing fruits. The extension of the sub-unit’s development to the subsidiaries was carefully initiated on the Qualification Summit. But still, when it comes to the collaboration with international subsidiaries, new geocentric practices and structures have not yet emerged. However, later in 2019, another, bigger international training conference was planned with more than 40 subsidiaries from all over the world and the preparations have already started – in a wholly different way than ever before: A plan was set up, mainly by E3, E5, E6 and E7 which involved several new characteristics: First, the conference itself was planned to combine the classic presentation mode of new training contents that have been centrally developed and an innovative, open space format in order to collaborate on fur-

ther ideas for concepts and co-create market-specific implementation planning for the practice of ARE. The latter one is what Barmeyer (2018) calls “negotiated transfer” and “negotiated adoption” as a way of constructively approaching practice transfer in order to reach the practice’ recontextualization. It was even planned to start with the classic conference mode on the first day of the conference in order to then find a good bridge to the second, open space day. Thus, inspired by the old and new world dichotomy we applied and worked with in the intercultural workshop, the conference was meant to take the subsidiaries on that way with us. I offered to build this bridge from the first, “old world”-day to the second, “new world”-day by giving a talk about the necessity of breaking with traditional patterns in a world which is more and more interconnected, diverse and complex and about the possible ways of organizing international cooperation, namely ethnocentrism, polycentrism and geocentrism. The responsible colleagues were very happy about this proposal. Second, the open space day – although being a rather self-organized format – however, was not thought off as being unstructured and messy. Rather, it was planned to develop ideas about topics that are to be discussed there together with the subsidiaries. That is, the sub-unit wanted to involve the subsidiaries into the setup and content of the conference. This was a completely new approach compared to the traditional one-way communication of the newest, central developments in terms of training concepts and materials, I experienced on the past conferences – a pattern I also wanted to break with on the Qualification Summit as described in the previous chapter. For this joint setup of topics, contents and agendas, some virtual meetings before the conference were planned in order to agree on them. A third idea was to engage the Spanish CC as an expert on the transfer of ARE for sharing his views and experiences with other interested subsidiaries. The plan was to design content for the conference together with him in order to provide not just the theoretical perspective but also practical experiences. This is different insofar as traditionally, its only HQ representatives who are responsible for teaching subsidiaries about training content on these conferences.

In summary it can be said, therefore, that this training conference, being the main and most important means of interacting with a broad

group of subsidiary training representatives for the HQ sub-unit, was aiming at moving as an essential international organizational practice from an ethnocentric to a geocentric level, considering cultural diversity as a resource for learning and development (Adler 1980, Blanche/Depuis 2019). For me, at that point in time, this conference would have been the logical next step or result of all experiences and learnings, individual and collective reflections and collective diagnosis that had happened before. It would have been the attempt of embedding the learnings into the organizational unit's practices and routines, its theory-in-use (Argyris/Schön 1978). It would have contributed to what Søderberg and Holden (2002) consider the core task of cross-cultural management: the facilitation of "synergistic interaction and learning at interfaces, where knowledge, values and experience is transferred into multicultural domains of implementation." (p. 113)

And here is the but: In July 2019, M1 and the broader unit's leader left, M2 and a new unit leader replaced them. This change in leadership was already announced when the intercultural workshop took place and E5, above all, indirectly expressed her concerns during the workshop:

"It's my wish to... So, M2 will come, he is a different kind of person, the topic of leadership, we are indulged by yours in this regard, [M1] [...] But we nevertheless can set an example of how we collaborate! [...] When we all are on the same track and set the example, it can bear fruits. There isn't much more that we can do."

Thus, even before M2 officially started to be our new leader, concerns were expressed, and not only by E5. It's important to note that we all already knew M2 as he was heading the neighboring sub-unit so far which pertains to the same broader unit like ours. In the first interview round I did in 2018, E2 has already talked about the importance of a certain kind of leadership for a project like the ARE transfer and the collaboration with international subsidiaries as a whole:

"Being brave and saying to our bosses, 'no, we want it to be like that, we do it like that' is working well in our department. In this regard we get a lot of support by [M1] and [the broader unit's leader]. Because normally,

managers always want to move higher and higher within the hierarchy. It's all about their reputation. For our work, it's all about the dealers, the customers and not about making the managers moving higher and higher. You recognize that, in [M1's] case, he is satisfied with where he currently is, he doesn't take ARE as a reputation project in order to move higher. You sense that because he likes to participate on our level, he allows everything, we are trying things out... By contrast, if you look at [M2] from the neighboring sub-unit, he is a young manager, he wants to move upwards, he would take the project just in order to promote himself and not in order to satisfy the actual target group. And that's what in our case has changed as compared to earlier times [...] and moved us a big step forward and made things easier for us. That is, the freedom especially when it comes to collaboration, has a huge priority within our team and the broader unit and really is beneficial for our project."

E2 clearly and honestly describes the characteristics of the current leadership culture at the point in time of the interview and contrasts it with the attitude of M2. It seems like the current organizational environment of having a leader who allows to try things out, who lets people take decisions because he trusts them, who takes the transfer of ARE seriously and not as a project to further foster the proceeding of his career had a very positive impact on the transfer itself and the department's development. E2 considers M2 as being motivated differently which implicitly means that this kind of motivation – in his opinion – would have the opposite effect on the transfer.

Things changed a lot after M2 took over: First, E3 left the sub-unit. This was, in my opinion, a huge loss for the department and for its intercultural organizational development in particular. As already stated at several occasions, E3 was an essential driver of moving the department into new, geocentric directions, of placing emphasis on and fostering the collective reflection of learnings and also because she was acting as – how she called it herself – “subversive change manager”, continuously balancing and bridging the old and new world of qualification. She also was the main driver in the preparation and design of the upcoming training conference like it was described earlier. Thus, thinking of Argyris and Schön's (1978) questions which help to evaluate the state of

embedment of learnings in the organizational theory-in-use, her departure might harm the further embedment of organizational learnings as she was essentially responsible for the learning process of the sub-unit in the case that full embedment hasn't been reached yet. In addition to that, she was always interested in the scientific perspective on things as well as motivated to learn and personally develop further. With her leaving, I lost an important partner for my action research endeavor.

The second big and immediate change related to the setup of the conference that was about to come. M2 cancelled both the plan of involving the subsidiaries beforehand into the setup of the conference's topics and agendas as well as the plan concerning the second, open space-day. He wanted it to be only informative without any interactive parts. He wanted to "just show the subsidiaries all the great concepts we have". Of course, we resisted and tried to keep our plans, but in the end, the whole conference setup, i.e. the contents and the agenda was designed by the sub-unit – without involving the subsidiaries. Simply put, the training conference, the key international organizational practice that could have been made perfect use of in order to develop towards geocentricity together with subsidiaries, returned back to its most traditional execution. Only the idea of inviting the Spanish CC as well as my talk about the breaking of traditional patterns was retained. In addition, arguing that I still needed some data for my dissertation, I got the chance to propose a workshop under the broader headline of international collaboration. In the following chapter, I will describe my approach to designing the workshop, the challenges I had in negotiating its concrete way of execution with M2, how it ultimately turned out to be and what the results were.

To sum this digression up: In my viewpoint of both being an employee of the sub-unit and a researcher investigating and fostering its intercultural OD, this change in leadership was highly harmful for its further development. Instead, the development went backwards in a number of senses: By turning back to a traditional conference format, the teacher-pupil relation was reinforced which doesn't demonstrate eye-level or encourage exchange, learning and the mutual appreciation of strengths. Additionally, by again defining the agenda and contents, a clear ethnocentric attitude was displayed: Subsidiaries had no chance to

express their needs or preferences with regard to the topics discussed or methods used. With my workshop, I nevertheless tried to keep some of the geocentric collaboration spirit, hoping for consolidating and internationalizing the sub-unit's waning development, believing that maybe, M2's attitude could change once he had experienced the benefits of cultural diversity and the beauty of intercultural interactions in general.

### 7.2.2.3 Intervention III: The international training conferences

In June and July of 2019 I spent quite some time with reading the literature about organizational development and action research which also inspired my workshop design proposal: I came across the practice of appreciative inquiry (Cooperrider/Srivastva 1987) which immediately caught my attention because of its positive view, its solution orientation and confidence in the generative capacity of individuals and organizations (Gergen 1982). My feeling was that this practice would fit well into an intercultural environment because it acknowledges and centers on the organizational system's strengths without rating them. This way, there is no better or worse, stronger or weaker. Through its clear resource orientation this AR practice shares the same paradigmatic assumption as a constructive understanding of culture, where cultural differences are viewed as a resource and not as a problem (Barmeyer 2018; Barmeyer/Franklin 2016; Blanche/Depuis 2019; Søderberg/ Holden 2002). The focus on strengths was a view I wanted to strengthen even more in the department's intercultural interactions, in the sense of bringing the resources and competencies residing unnoticed in the global training community to the surface, appreciating them and start integrating them geocentrically – and by doing that potentially reaching cultural synergistic outcomes (Adler 1980). This is exactly what the AI process aims at in its four phases (see chapter 6.2): Finding the best of what is, envisioning an ideal state, designing and co-constructing this ideal state and ultimately defining actions that help making this ideal state come true (Ludema/Fry 2008). Thus, on an intercultural stage, this approach of appreciating strengths and jointly negotiating a future state of international cooperation seems to be a perfect intervention to promote intercultural organizational development where both HQ and subsidiaries are part of and contributing to.

My workshop was scheduled for the last day of the conference right before M2 was planning to summarize and end the conference as a whole and everyone would start returning back home. The time I was able to fill was two and a half hours. Directly before the workshop, my talk was scheduled which served as a kind of introduction to the workshop itself. I called this speech “Musterbruch – About the necessity of breaking patterns in today’s world”. I specifically left the German word in there because I wasn’t able to find an English translation and somehow thought that this term could become a shared, kind of company speak (Björkman/Lervik 2007; Logemann/Piekkari 2015) expression that symbolizes the new way of cooperating we hopefully would define in the workshop afterwards. The speech started with talking about the uncertain, volatile and complex times we are living in and ended with asking what our – as a global training community – Musterbruch could be before providing an overview over the three international strategies ethnocentricity, polycentricity and geocentricity. I explained all three strategies and stated that a geocentric version of international cooperation potentially is the best way to deal with these complex and fast-changing times in the most productive way. This speech “survived” all discussions with the organizing team and M2 and I held it exactly the way I planned it to on these conferences. Thus, within this talk, I introduced the participants to an alternative way of collaborating internationally and they already were familiar with the term geocentricity before starting with the actual workshop.

I designed the following AI workshop: For the first phase, the discovery phase, I was planning to invite the training managers on stage in order to pitch their most favorite training concept within three minutes. Of course, I was just assuming, first, that there are almost all subsidiaries developing own training concepts and second, that they are willing to share them with others. I was planning to dedicate much time to this pitch session in order to make visible how big the variety of ideas and initiatives is within the global network and how little we know about each other’s work. This first phase was meant to lay a positive foundation, to get to know each other and introduce the own work to both the HQ sub-unit and to fellow subsidiaries and maybe even initiate or at least make participants think of a potential horizontal transfer of prac-

tices (Chiang et al. 2017). For the second, dream phase I was then planning to ask them to mentally connect with the future state of our global training community, where this type of exchange and mutual appreciation of strengths has become normal and a daily routine. I wanted to ask them to think of this future, geocentric training community as a real or imaginary creature, a metaphorical task which was meant to help the participants to release what currently is and really think out of the box without being bound by current routines and practices. I wanted to guide this metaphorical exercise with some supporting questions such as: How would the creature look like? How would it move? How is it healthy and striving? What are its needs and challenges? I was planning to ask them to draw their very own creature and collect these drawings in a collage on a wall afterwards. After that, the design phase would have centered on bringing these visions down to the real world again, thus, translating the characteristics, needs and challenges of the creatures into our common training business and jointly designing its future architecture. The destiny phase would then have focused on agreeing on some next steps in order to make our jointly constructed geocentric training community come real.

I presented this plan various times to a lot of colleagues and especially E3 – who wasn't part of the sub-unit anymore but nevertheless was happy to support me and my planning – E2, E5 and E7 liked the idea and supported it. I also introduced M2 several times to my idea and the planned setup of the workshop and, although I sensed some reservations from his part, he finally agreed on it. Four days before the first conference started, however, the agenda of the conference was changed and my workshop time was reduced by one hour from two and a half hours to one and a half hours. I fought again for returning to the original workshop time but didn't succeed. This finally canceled my plan, because time just wouldn't be enough to go through the whole AI circle. That's why, in the end, I focused on the first two phases of the AI circle, i.e. the discovery phase – everyone liked the pitch sessions – and the dream phase – but without the metaphorical task. This task basically was, I guess, what made my whole workshop too out of touch with the real world for M2.



In the following, I will summarize my observations and review the results of each of the conference groups before then turning to the analysis of the final round of short, reflective interviews with E1, E2, E4, E5, E6 and M2 as part of the turnaround period.

### **Conference group 1**

The conference as a whole was split into three different European locations and dates in order to give a wide range of training managers the possibility to join for one conference. The agenda and setup was the same for all three of them. The first conference took place in Belgrade and participants originated from 15 different countries, mainly from Eastern Europe, but also from France, Mexico and the Middle East. During the first two days of the conference I already asked some of the participants whether they would like to pitch their most favorite training concept in my workshop. I did that on the other two conferences as well. All participants already had been asked to prepare a pitch in the final email the participants got one week before the conference started. In the end, six participants pitched a training concept by relying on presentations, videos and websites. The atmosphere was very open and appreciating, everyone listened carefully and attentive, including all HQ sub-unit representatives. We would have had time for more pitches but the majority of participants was rather reserved. One possible explanation for that is that the training managers mostly were from small subsidiaries from small countries with only few dealerships. In most of the cases, they were the only ones within the subsidiary who took care for training issues and even performed as trainers at the same time. One of the participants I had asked before the workshop whether he wanted to pitch a concept said that he cannot really think of an own concept that would be worth pitching. Another participant from the small Bulgarian subsidiary told me that he isn't able to design own concepts due to limited financial and time capabilities and that he, instead, refers to the centrally developed ones. This also served as an explanation of why he cannot participate in the concept pitch in the workshop. From that, I reason that the smaller, less "potent" subsidiaries in terms of financial and personnel resources dedicated to training happily draw on the centrally developed concepts proposed by the HQ sub-unit because they are

unable to develop own ones. And indeed: The participants who pitched concepts all originated without exception from relatively bigger subsidiaries such as Austria, Middle East, Greece or Turkey. This was one of the most important insights I gained on this first conference which shed additional light on the heterogeneity of subsidiaries.

One could go deeper into the individual contents of the training concepts, their focus and cultural specifics but that's not the focus of this thesis. Instead, the discovery of locally developed training concepts was meant to make local ideas and initiatives visible in order to illustrate that there are more good, non-central concepts and that it does not always have to be the centrally developed ones that are shown on these kind of conferences. In the second part of the workshop, I then asked the participants to gather in groups and imagine a geocentric world of training in our global community and think about first, what topics would be most important for exchange and mutual learning and second, how a training conference could look like in a geocentric world and visualize the answer on a piece of paper. Especially the reflections on mutual learning and exchange by the Latvian-Czech group are to be highlighted here: They started by reflecting on the current status of what they as (small) subsidiaries are doing and what possibilities there are to change by drawing the following picture:

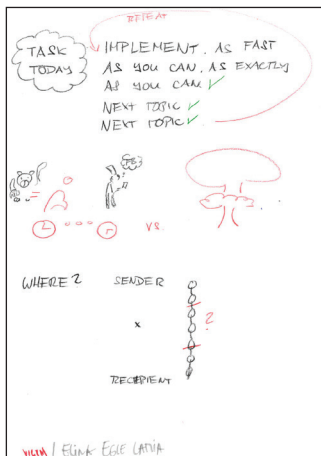


Figure 39 Reflections on current and future state of HQ-subsidary interaction

They explain it in the following way:

“We somehow realized that **what we do today is implement**. As fast as we can, as exactly as we can. We have standards, we have descriptions, we are being taught project management which is nothing else then removing obstacles that hinder us from the most efficient and fast implementation of something. As soon as we have, certification, next topic. Roles, implement as fast as you can, as efficiently as you can. **Done, tick,**

**next topic.** Basically the trigger for the implementation comes from [the HQ]. If I'm implementing something, I love you guys, but why would I contact anyone of you to help me with that? What we were talking about was, how do we implement the stuff that somebody created and has asked us to do? **In a geocentric world, we are partners.** Where every one of us has the responsibility for his business. So, this is what we do now [...] there is an idea born centrally, there's an idea implemented at our importers. Do we want to break the chain? That's the question! If the chain is not broken, in five, ten or 15 years, **we will still be exchanging about the same topics in the same manner. Because what we do hasn't changed.** So, is it a good thing or a bad thing, I don't know? So, if we assume that we want to keep it: Nothing bad about this. We'll go on. If we assume that it would be better for us, for the community, to break this chain, there is two ways where this chain can be broken. One is at the sender and the other one is at the receiver. What do I mean by that? [...] **Either the sender will stop sending.** No projects to implement, projects need to born at the importer level. Then it would make sense to exchange. Or, alternatively, if the chain needs to be broken, the **sender keeps on sending, but the recipient says: No!** The US, for example, they have their own stuff. If it's better or worse than ours, I don't know! They did it like that. So, I mean, the decision that we will probably have to make is, if we decide that it would be viable to discuss different topics in the future than today is whether we break the chain and how do we do it best for the benefit of our community."

The middle part of the picture is described as the way change can happen – evolutionary or revolutionary. I find it worth to depict almost the whole explanation of the group because it gives a very clear picture about the reality of the “normal” training business from subsidiary perspective: Neither the Czech Republic nor Latvia has been part of the ARE transfer so far, i.e. they are able to refer only to the other, “normal” training business of the HQ sub-unit. This quote is very insightful for two reasons: In the first half of the quote, the group describes their perception of today's HQ-subsidary interaction which fits well to the HQ sub-unit's description of the old, ethnocentric world of qualification analyzed in chapter 7.2.1.2. Here, it's all about the implementation of

standards and prescriptions dictated by the HQ. By contrast, in a geocentric world, they would consider the HQ and subsidiaries as partners. In the second half of the quote, they focus more on the topic of exchange as an important part of a geocentric world which, for them, only makes sense when the “sending chain” between HQ and subsidiary is broken: That way, ideas would have to be born locally and it would make sense to exchange on them. This is very comprehensible and fits well to the observation of only bigger subsidiaries pitching concepts while the smaller ones aren’t because they are not able to develop own ideas: The bigger subsidiaries, according to the group’s description, have broken the chain right in front of them, so that the HQ may keep on sending, but the subsidiary shuts down and decides to not receive anymore. Thus, the conclusion that can be drawn from combining this reflection with the observations of the pitch sessions and the comment made by the Bulgarian participant that bigger subsidiaries are more likely to find themselves in a polycentric world of qualification and training while smaller, less powerful ones in terms of resources (Ferner et al. 2012) are caught in an ethnocentric relationship with the HQ. According to this group, a polycentric development of training concepts would be necessary in order to geocentrically exchange on them. It again gets visible, that according to Perlmutter’s (1969) assumption no multinational company follows one strategy in its pure form but that each company has a certain EPG profile.

Other groups answered this first question about topics where exchange and mutual learning could happen in a geocentric world in a rather practical way: Here, topics were named such as talking and sharing insights about the different technical infrastructures or training methods used.

The second question about how an international training conference – being an essential practice of the international training community – could look like in a geocentric world, revealed a lot of interesting answers: Figures 42 and 43 summarize some quotes.

| Group              | Statement Number | Statements about a geocentric training conference  |
|--------------------|------------------|--|
| Subsidiary Group 1 | 1                | "Training Days or conferences or TT should be F2F. Because, we also notice that we exchange a lot of information, we ask a lot of questions, we afterwards catch the guy or lady and ask for more questions. So it's very important to be in one place and to interact."   |
|                    | 2                | "There maybe should be more about gamification, <b>not so many strict powerpoints</b> , sometimes you are a bit tired of them."  |
|                    | 3                | "What we are missing is <b>training content in more detail</b> , not just saying this is the program, in two days, this is blablabla, but dig into more details, maybe talk about the challenges, the new things that are added, so, just go into more details. Yeah, this is about new training courses you are providing us."  |
|                    | 4                | "There should be real cases and benchmark studies as well, because <b>sometimes theory is not enough</b> , you want to know something already from the practice."  |
|                    | 5                | "We also had the idea that maybe want to make market specific workshops like, we are a small country, we not always can do the same things like biggest countries. So maybe it's worth to sometimes <b>we should be moved into different rooms</b> and we could actually <b>talk about our actual topics</b> with those which are the same size as we are."  |
|                    | 6                | "Gossip and stories. If we share stories what's happening at our importers... In Czech Republic we say: Who with whom and how many times? This kind of gossip. You just tell the other party situations and they think: Is it applicable? Can I use it? Very often, today, <b>we present one and the other already with solution process, this is how you do it</b> . I can follow it, <b>but if I haven't the process before, can I learn from it?</b> Sometimes I can, sometimes I cannot. <b>But if I know what's happening in the grassroots in [the NSC Baltics, if I know what's happening in [the NSC Poland, how the whole power struggle looks like, for example, there is a new boss, he doesn't like this guy and the got kicked because of that. It gives me a possibility to think: What is it that in that context, these people would require on training?</b> Because what we sometimes do, and it's not bad, it's a decision and it works. We take training which of itself is very sound and we place it on a setting that may not match the training. So, for me the point of gossip is very important in that, if I know what my colleagues are going through [...] <b>The more we know about the situation, just the situation, not the solution, of our colleagues, the better our view what's happening and the better I think we can foresee the future.</b> Yeah, that's the gossip and stories." |
|                    | 7                | " <b>Keynote speaker from different industries.</b> I remember, it was 100 years ago, but still, there was this training conference, and there was this Lufthansa pilot telling about how they practice, how they keep on practicing every day and every week to be on this perfect level of the lowest damage accidents etc. It always inspires and actually, I still remember what he said and it's a long time ago, but maybe it's useful to check and maybe invite if we talk about this new strategy of surprising etc., maybe there is a company which has a success story behind already."  |

Figure 40 Statements about a geocentric training conference

| Group                 | State-<br>ment<br>Number | Statements about a geocentric training conference  |
|-----------------------|--------------------------|--|
| Subsidiary<br>Group 2 | 1                        | <p>"We like <b>this concept of best practice sharing</b> and maybe it could be expanded. So, for example, we were asked to bring a concept along and I talked about the Management Academy, which might be of interest for no one. So, why don't we share the best practices beforehand? Example: What best practices have you got to share? We put it on a platform, every participant votes and if we want to go deeper into the topic, then we could do it during the market days, the Training days. We could do it using a market place concept, we could do it through a presentation, but <b>I think sharing ideas and experiences will become more and more important, because, my understanding is, we are going towards this geocentric approach. So, we are moving away from the top-down approach, or from AG to the importer approach.</b> So, sharing is essential, we imagine more sharing. And of course, it would be time consuming for us as well, but <b>I think we would all benefit from that.</b> Because there would be some preparation work to be done, but then we could really benefit from your experience in your market on that particular project and maybe I haven't thought of it! [...] <b>And thank you, Carina, for giving us this opportunity.</b>"</p> |
| Subsidiary<br>Group 3 | 1                        | <p>"<b>Bring people from other industries.</b> We know that car industry is not the only one which is struggling with having difficult times, tough market conditions, whatever, so bringing someone from toher industry to see another perspective of how to tackle problems, I mean, just because they are in a different industry or different ambient, that doesn't mean they don't deal with the same, so maybe we can learn from them also to how to tackle our own problems, how to get out of tough situations."</p>   |
|                       | 2                        | <p>"<b>An ideas exchange forum.</b> We know that we are from different backgrounds, different markets, different mentalities. But probably we all share something in common, like you said probably to put some ideas beforehand ist, <b>these are the best practices around the world, which of those we should share and get a deeper knowledge of how to implement it.</b>"</p>   |
| HQ Group              | 1                        | <p>"<b>That we are consistently co-creating together,</b> so that we have a TTT Lab, where we work on concepts or, not only to present what we think and today, we presented a lot of ideas and then to work on this, maybe even develop some little concepts, so that you can go home with something in your package and not only what you have in mind what you can get on the ATO. So, yeah, the <b>co-working lab and then to bring it on the road.</b>"</p>   |

Figure 41 Statements about a geocentric training conference (continued)

Not all participants actively participated in the second, interactive part of workshop. I also asked the HQ representatives to participate in visualizing the future geocentric training conference, but only two colleagues finally followed my appeal.

In a retrospective, I should have been more demanding in this regard and clear in that true intercultural development cannot take place without one or the other party. In general, the attitude displayed by the majority of colleagues during the whole conference didn't demonstrate any eye-level or togetherness. Colleagues very often only were present during the breaks and in the moment they had to do a presentation or workshop. They mostly didn't listen to other colleague's presentations nor did they take part in the few interactive workshop parts. For me, this attitude and behavior wasn't a good sign for respect and interest into the subsidiaries' needs and challenges. Also, during the preparation phase before the conferences, I asked whether someone of my colleagues would want to also pitch a concept in the pitch session – to demonstrate this eye-level and togetherness. But nobody wanted to do that. And then, during my workshop and especially the second half of it where it was all about dreaming of a future, geocentric version of a training conference, a lot of colleagues were gone and only two of them participated in this phase. This is, in my opinion, not showing the HQ's commitment to a change into that direction. Rather, this shows huge indifference. At that point in time, I was just angry about this kind of behavior. I really wanted it to work, I wanted to develop towards a more partner-like cooperation with subsidiaries like we already experienced it during the practice transfer. Now, I'm sadly noticing that the lack of active participation is pointing out that the intercultural development, the increased ethno-relativism I was able to observe during the first two and a half years of my research period hadn't survived.

The present quotes, however, provide a lot of useful insights: First of all, the pitch session as a kind of good practice sharing method was highly valued by all groups and constitutes for them an important part of a geocentric training conference in the future. There even emerged ideas about how to make it even more efficient and useful by, for instance, voting beforehand about which training practices to talk in more detail. However, the statement of group two leads to an import-

ant interpretation: By stating that “sharing ideas and experiences will become more and more important, because, my understanding is, we are going towards this geocentric approach” one could reason that the presenter perceived “this geocentric approach” as being set, as if the decision to go into that direction is already taken and they as subsidiaries once more are mere receiver of HQ instructions and decisions. And because this decision is taken, the exchange of ideas and experiences is perceived as needed to be important.

I cannot deny a certain bias from my part here. By explicitly favoring the geocentric strategy as being the best one among the three possible ones in my keynote speech before the workshop as well as by asking the question like I did I ethnocentrically set the agenda and didn't allow for geocentrically negotiating it. Actually, I already came across this potential ethnocentric trap I was about to walk into as a researcher during my preparations: I decided to take this risk and to ethnocentrically announce this shift in strategy in order to maybe reach geocentricity in the end. This way, I used the present dominating culture – just like E3 had described it during the intercultural workshop – in order to pave the way for an alternative approach.

The second main insight is provided by the first group: Statement five refers to the previously discussed heterogeneity of subsidiaries in that they wish to talk more to other countries of the same size and therefore facing similar challenges. The following sentence, again, allows for drawing two important conclusions: “Maybe it's worth to sometimes we should be moved into different rooms and we could actually talk about our actual topics.” That the presenter here uses the passive form in the first part of the sentence indicates that even in a geocentric world it is expected to be the HQ who decides about what to happen and how the execution of a conference looks like exactly. This shows that the group – still – cannot think of geocentrically deciding these things together and on eye-level, there still is expected to be a hierarchy. The term “move” supports this even more as the presenter doesn't use the word “go”, for instance, which would imply more self-responsibility. Instead the “we should be moved” leaves very little room for self-initiative. The second half of the sentence gives another important indication: The term “actual” is used twice within a half sentence containing eight words. The



fact that the term is highlighted that much leads to the conclusion that the topics discussed on the training conferences so far, very often, do not really target the subsidiary's needs. As the presenter is relating it to the subsidiary's size, she obviously feels that the majority of topics that are normally discussed on the conferences don't really touch on the actual problems or needs of smaller subsidiaries and markets. By dividing the participants into their markets' size, the opportunity would be born to finally talk about things they actually are most interested in and needing to talk about.

The third important conclusion can be drawn from the same group's statement six about what they call "gossip and stories". What is meant by that is the context or situation within which a training concept was developed by the HQ or a particular subsidiary and which had informed the development of that particular concept. What the group indirectly criticizes is that very often, they are confronted with solutions from which they aren't really able to tell if they "match" with their own situation. Thus, getting to know each other's contexts more would foster learning from each other because the rationale behind the specific training concept would become clearer. This also means that in the past, it was all about ready-made solutions, i.e. training concepts, and not about really getting to know each other. In a geocentric world, however, getting to know each other for better being able to exchange and learn from each other, for this group, is an important part.

Another, concluding thought arises when looking at the difference between the responses given by subsidiary training managers and those given by the two HQ representatives who participated in the dream phase of the workshop: While the training managers offer concrete ideas which aren't breaking sharply with the current practice of conducting a training conference and still fit into their mostly unconscious perception of an ethnocentric HQ-subsiary relationship, the HQ representatives are talking about co-creation and joint development of concepts. This shows that – on a developmental continuum from ethnocentricity to geocentricity – the HQ representatives are much more ahead, have a higher maturity with regards to geocentrism – at least rhetorically – than the subsidiary representatives.

The workshop on this first conference was the most insightful one because there was enough time left after the pitches in order to enter the dream phase and discuss the two guiding questions.

### **Conference group 2**

The second conference took place in Dublin. Representatives from 14 subsidiaries took part in a conference setup that was exactly the same like the first one. Nationalities ranged from the US, Canada, Ireland and UK to Brazil, Portugal, Spain, Poland, Slovakia and Japan, among others. Again, I started to “recruit” speakers for the workshop’s pitch session and in the end, almost every single country presented a concept or idea for future development. Some spoke freely without any supporting materials, others showed videos, websites or presentations. Everyone seemed to be really proud to introduce the fellow participants to one’s ideas and concepts and even participants who first denied to do a pitch because they couldn’t think of a good concept or idea to share (these were smaller countries like Rumania and Bulgaria) or because they were afraid of talking in English (Brazil) came in front in the end and said some words. I recognized a lot of people taking notes from the other’s presentations. After the conference, the Spanish transfer responsible who took part in that conference as well, told me that she will adopt the idea presented by the Portuguese training manager – a horizontal practice transfer (Chiang et al. 2017) has therefore been encouraged by the pitch session. Again, it would exceed the scope of this thesis to go into more detail regarding the concepts that were presented. Rather, the Dublin pitch session, in my view, was the best example for demonstrating the big number of local initiatives and the willingness to share them on the part of the subsidiaries.

Regarding the second part of the workshop, there was merely enough time left to tackle only one question, namely the second one about how a training conference in a geocentric world could look like. All of them wished to further institutionalize the best practice exchange by, for instance, prepare it better beforehand and agree on questions that then are to be discussed when meeting on a conference physically. One group, for instance, summarized pointedly:

“If we could have some voting on maybe the topics that are covered [...] If we could maybe submit some of our own ideas or things we’d like to talk about or have a blank, like an open discussion session here for an hour and a half or something, that would be nice to have. We really liked the last session that we did and I think having like a template or structure ahead of times that we can share these ideas, present them here and then ask questions and maybe dive in a few of those over here and see them ahead of time. [...] Also, being able to get together either virtually or in person during the year as the different markets and there are some sort of performance groups and sharing some best practices among each other and not have to wait the year and a half or two years to come here.”

Just like it became apparent within the first conference group, the HQ is still perceived as being the one who is deciding upon a specific conference design: The presenter of this groups’ answers to the question introduces his group’s propositions with “if we could maybe” – like if they were solicitants in a child-parent, pupil-teacher or subordinate-boss kind of relationship, fully dependent on the decision of the superior person. However, at the same time, this statement shows particularly well, how keen subsidiary training managers are to actively participate in the design of such conferences. They are explicitly asking for involving them in some sort of negotiated conception (Barmeyer 2018) of conferences and even beyond that. By involving subsidiaries into the conception of practices like this one different worldviews and competences could be integrated and thus lead to a true intercultural organizational development everyone commits to (Barmeyer 2010). This second workshop showed again how ready the international subsidiaries are to develop further into a geocentric direction. On the other hand, another group, composed among others of the smaller subsidiaries Bulgaria and Rumania, clearly depicted in their visualized answer to please not change things that are working well and to “maybe do not develop a new concept of training conference”. This again fits well into the notion of parallelism of bigger subsidiaries, on the one hand, which have the power to act independently with regards to training issues while smaller ones, on the other hand, are dependent on the training concepts provided by the HQ because they don’t have the resources to act independently. They therefore also want to keep on listening to the

latest central developments on these kinds of conferences like it always have been the case.

### **Conference group 3**

The last conference took place in Copenhagen and involved participants from 18 countries, among them the Scandinavian countries, the Netherlands, Japan, China, Hong Kong, France, Belgium, Spain, South Africa, Australia and Canada. Here again, the pitch session was so popular that in the end, there was no time left at all for further investigating into a future, geocentric version of our training community. That is, unfortunately, no insights are gained from this conference group about their visions of a geocentric training community.

All in all, the workshops went well in the sense of that they worked out as I was planning to: I intended to make our community's strengths and competences visible in the discovery phase for both the HQ sub-unit as well as the fellow subsidiary training managers. I sensed a great willingness to share and pride on the part of the subsidiary representatives, especially in the Dublin and Copenhagen group. The second, dream phase of the workshop provided me with a lot of useful insights about the current perception of the HQ strategy on the part of the subsidiaries and demonstrated the – although sometimes very carefully expressed – willingness to participate more in the design of joint practices like the training conferences. It also revealed that, first, whenever this most important international interaction format in the organization's training business was to be changed, the initiator of such a change was expected to be the HQ. It seems that, in order to reach a geocentric form of collaboration on these conferences, it would have to be ethnocentrically dictated or initiated by the HQ. Second, it showed again the heterogeneity of the subsidiaries in terms of power and voice and weight – just like it already was reflected on by the sub-unit team members in the intercultural departmental workshop – as well as its consequences in terms of the adoption or adaptation of central concepts or the local development of own concepts respectively. Third and adding to that, an alternative way of organizing such a conference may not be the best solution for all subsidiaries as some of them are highly dependent on centrally provided training measures and benefit from the classical one-way street communication. This intervention therefore

again shows how complex reality is and that there are a lot of effects and cultural realities to be taken into account when thinking of new ways of collaborating internationally.

### 7.2.3 The turnaround: Reflections part III

Although, in my perspective, the turnaround of the sub-unit's intercultural OD chronologically already started before the training conferences with the advent of the new leadership team, it became even more apparent during the interviews I conducted afterwards. I conducted short, unstructured, reflective interviews with almost all involved HQ sub-unit members in order to evaluate the conference itself and the workshop I conducted in particular regarding its contribution to the joint development towards geocentricism. The guiding questions were how they felt about the workshop, what surprised them positively or negatively, what we as a HQ have learned and if and how the workshop would impact our future work after these conferences. The first thing that immediately became apparent is that almost all interviewees only referred to the first part of the workshop, i.e. the pitch discovery session. Only E2 mentioned the second, dream phase, saying: "I liked that very much because it was a first step of saying, 'let's work on things together!' This being more together, that was nice." All others merely referred to the first, discovery phase of the workshop. Of course, most of the time was dedicated to the first part. It might therefore be remembered the most as well. All of them share positive emotions about its aim and impact: M2 talks about the "inspiration" the participants were able to gain. E4 considers it as being "appreciative" for subsidiaries as "they were given the opportunity to show theirs, they were able to also show what they are able to do" and further adds that that way, the HQ sub-unit was able to better get to know "what's going on out there and what they need". For E2, it was great to see "what moves their minds and what new, innovative and creative ideas came up." The notion of "appreciation" as well as "to get to know about these things, that everyone gets to know them" (E2, HQ) is present in several interviewee's accounts. E5, for instance, states:

“I think it was very appreciative for the participants and you sensed that they really liked doing it. It impressed me to see how much they are all doing! For me, that’s a signal to use all that potential even more, the pitches virtually were an invitation for that. But first of all you need such a session in order to know that! To make it transparent, visible and to give each other suggestions. And I like that kind of format because it was not only the subsidiary communicating to us, like if it was forced to report that it has a professional program, but that the goal rather was to fertilize each other. That is, not a presentation only for us but for everyone who is participating.”

Thus, obviously, the first part of the appreciative inquiry literally led to the discovery of the best of what is, of the company’s global training community’s strengths – just like it is the goal of the first phase of the 4-D-cycle – and therefore potentially would have laid a powerful foundation for further, joint thoughts about organizational change (Ludema/Fry 2008).

The last part of E5’s statement additionally gives an indication of how it obviously felt in former times when subsidiaries gave a presentation somewhere: a report of the things they are doing for the sake of pleasing and satisfying the HQ. That the HQ is now open for the great variety of local solutions and concepts is what is stressed by E6 as being one impact:

„The workshop showed how diverse the concepts are. [...] I think each market has a little different framework conditions and when I can draw on this variety, first, I feel more comfortable and second, I can pick out what is most fitting for me. Theoretically, we cover all topics with our [central] proposal. We know, however, that a lot of them do it again because they think they can do it better or because it’s simply not fitting 100% to the market’s situation. And instead of adapting ours they develop it from the scratch. Now, we have more things to offer. And above all, the openness for exchange, I think, has shown that we don’t stick to a single concept but it’s all about finding the best solution. And that’s why I think it was really good. Of course, it also was very appreciative for each single subsidiary to present its concept.”

What additionally becomes apparent from E6's statement – who also was the one who highlighted the good things about the old world of qualification in the intercultural workshop – is his individual, not very far developed intercultural competence: Saying that the HQ would theoretically cover all topics the subsidiaries would possibly need in terms of training as well as his assumption that subsidiaries develop own training concepts because they think “they can do it better” points to an ethnocentric (Perlmutter 1969) or even parochial view of seeing the world (Adler 2008).

All interviewees further agree on that it is now all about sustaining and further institutionalizing this spirit of togetherness and exchange, also in the daily work life after the conferences – and that this is the most difficult part. The statements regarding this difficulty of sustaining and institutionalizing the exchanging and collaborative spirit that was fostered during the workshop are summarized in the figures 44 and 45.

| Inter-viewee | Statement Number | Statements about sustaining and institutionalizing a new way of cooperation   |
|--------------|------------------|---|
| M2           | 1                | “I fear <b>we haven't learned as much from it</b> as we would have wanted. Because, the thing is, you hear that in that particular moment and think, nice, amazing and so on. [...] And <b>then nothing happens because I cannot find the time to do it</b> . And that's crap. That's crap because that's always the thing: You do something, the impetus actually is great. In my opinion, <b>it's a problem of our capacity</b> . [...] I am <b>not able to set priorities</b> right now. They are just there.” |
|              | 2                | “When I look at it from the outcome, I wouldn't change much in terms of the conference setup itself, acutally <b>I wouldn't change anything</b> . The question rather is <b>what happens afterwards</b> .”  |
|              | 3                | “ <b>Detailing a person for that doesn't lead to anything</b> .”  |
| E1           | 1                | “ <b>People are now needed who actively work on these new ways of cooperation</b> in the sense of trying out exchange formats and following up on them. Just the fact that we now did that [pitch session] and <b>just from seeing that it worked out well, does not lead to any change</b> .” It's the job of every single one of us to find out what I can learn from that and were I can turn the one-way street around because otherwise it will <b>just stay a mock exchange</b> .”                          |

|    |   |   |
|----|---|---|
| E2 | 1 | "There is <b>someone needed who takes on the leadership</b> in that. You, for instance, you initiated it, you have worked on it, you have the overview, you could keep on going and [...] coordinate. That's what is needed now. But I guess, when I look at the current chaos here ... I don't think that there will be <b>a responsible person who further takes care</b> for that. And the <b>support of [M2] is needed</b> . That's missing now." |
| E4 | 1 | " <b>Everyone falls back into daily routines</b> . During the conferences, everything is cool, everyone is saying 'oh yes, this is what we need to follow up on, nice, this is what we need'. But afterwards all that is forgotten quickly. [...] It's just because we all have so much to do. <b>We all fall back into short-term tasks that need to be done. We cannot sustain that.</b> "  |

Figure 42 Statements about sustaining and institutionalizing a new way of cooperation

| Inter-<br>viewee | Statement<br>Number | Statements about sustaining and institutionalizing a new<br>way of cooperation   |
|------------------|---------------------|--|
| E5               | 1                   | "When we want to establish a different form of cooperation, it's even more important <b>that we dedicate effort</b> in order to foster that. I'm also flip-flopping. I got a new topic to work on today and <b>everyone has limited capabilities</b> . There is indeed this feeling of 'job done'. [...] We reported to our bosses how it went and that's it. The danger is there that it seeps away. <b>What can we do to establish a continous process?</b> In my opinion, probably, <b>a kind of regular meeting is needed</b> , once a month or so, were we say, we as a department communicate something to the markets." |
|                  | 2                   | "When we really mean it, <b>we need to set an example</b> . Otherwise the geocentric approach doesn't work. I mean, I could also live with a centralized organizational structure. If that's the way, I'd say, okay, these are my ToDos, I start controlling again: Have you done that? But that's of course ... [Interviewer: But you wouldn't be satisfied with that.]" No! <b>But this isn't reached by itself.</b> "   |
|                  | 3                   | " <b>If [M2] wants that, if he says that we do wanna cooperate geocentrically</b> , I could say, well, I already have exchanged with a market this week about this and that. Because, if we want to institutionalize it, <b>we need some kind of assistance</b> . Otherwise we won't reach that."  |
| E6               | 1                   | "I cannot judge what people now really take with them. You can't look into their head. But I think, <b>from our side, we have provided those with the possibility to learn</b> from it who are willing to learn. <b>Who doesn't want to learn – bad luck!</b> But we definitively gave them the possibility and <b>that's our job.</b> "   |

Figure 43 Statements about sustaining and institutionalizing a new way of cooperation (continued)

Interviewees state that most often, after these kinds of conferences, the daily work and everyone's limited capacity gets in and doesn't allow to



further work on things that were discussed and maybe agreed on during the conference or on the way of intercultural collaboration as whole. E1 sees it as the responsibility of every single sub-unit member to dedicate effort to it. E5, too, points to the importance of setting an example as a HQ and to keep on dialoguing with international subsidiaries. She also feels that there are some kind of practices needed, like a monthly meeting where the HQ agrees on some sort of communication to the subsidiaries. She feels that it would just take some effort from the HQ's side. E6, by contrast, sees the responsibility of keeping the momentum of exchange and mutual learning on the part of the subsidiaries by stating that the HQ's job is done with providing the opportunity for exchange. E2 thinks that there probably would be a responsible person specifically dedicated to intercultural cooperation needed, while M2 doesn't think that this would lead to anything. E2 further details his opinion:

„It now needs to roll on. And that's where I'm skeptical. I don't know whether I'm too pessimistic but, when we look at you, we don't know what will happen, but I think apart from you, there is no one who drives and demands it. I think from the top, there won't be much. And that's where you are such an asset because you bring in this different perspective while we all are rather focused on our [training] topics. And the topic of cooperation and intercultural cooperation in particular was on nobody's radar. I'm scared that there is no one who takes care for that from now on.“

Three important conclusions can be drawn from this statement: First, E2, just like E5, feels that a change in responsibilities and practices is needed in order to formally support the geocentric mindsets most of the team members have developed. Thus, using Barlett and Ghoshal's (1998) words, the sub-unit's *anatomy* and *physiology* needs to be adapted in addition to its changed psychology of ethno relativism (p. 286ff) – just like E5 highlights in statement 2 and 3 of table 45, change isn't reached by itself, but requires effort, leadership support and some kind of “assistance” in order to reach institutionalization. Establishing a role which is particularly responsible for intercultural cooperation would be a kind of “assistance” as well as an indication for the institutionalization of

ethnorelativistic and geocentric attitudes (Sievers 2000). Second, E2 doesn't feel any leadership support in terms of further fostering and actively demanding geocentric behavior. Once more, the leader's influence is highlighted as being one major – and in this case missing – factor (Perlmutter 1969). And third, he is taking notice of my impact as an action researcher in the sense that I have brought in a perspective nobody have had before and nobody is able to take on in the future when I am gone. When I conducted these last, reflective interviews, I was right before withdrawing from my operational tasks in order to finalize my thesis – without a chance to gain an employment at the sub-unit after my doctorate. Thinking of Argyris and Schön's (1978) questions that can be asked in order to evaluate whether double-loop learning, i.e. an embedment of learnings in the organizational theory-in-use, has taken place, the third question of whether the results of an inquiry were encoded in the organizational theory-in-use and whether individuals in the following acted accordingly even in case of the departure of the individual who initially was responsible for this learning needs to be answered with "no". In other words: Even if I, for sure, wasn't responsible for the learning that took place and was described in the past chapters all by myself – E3 who has left the department earlier, for instance, has another important stake in it –, I nevertheless was supporting it through my presence, my interactions with the sub-unit and my interventions. The fact that E2 feels that no one will take care for taking on that perspective and the topic of intercultural cooperation in particular once I'm gone shows that this *perspective* is not yet encoded in the organizational theory-in-use and thus, cannot be taken on by the sub-unit as a whole and guide its future intercultural interactions in an ethnorelativistic way.

However, on an individual level, ethnorelativistic attitudes are still visible: E5, for instance, states that:

"I'm a firm believer in that we aren't the brightest bulb in the box and that we cannot cover all needs. When we find a way to make use of this collective intelligence, we will be much more successful. Especially in the

future: They are much closer, they know much earlier what they need and if we are able to find fast ways of communication, we'll make sure that our business survives.”

Even M2 agrees with a statement I made during the interview, saying „Isn't that our main business: the contact and work with international markets? Actually, there, we shouldn't be short in time” with saying „Right, absolutely, I agree on that at 100%.“ However, this statement isn't in accord with the team members' perception: E4 states that “having a good rapport to the markets is not that important for him right now”, E5 indirectly expresses the same with saying: “If we as a team consider it as being right and good, we also can convince [M2]. We don't have to wait until he is pushing it.” Most critical about the new leadership's attitude and influence is E2:

“Under the new leadership this spirit is getting lost. I mean, [M1] was excellent in this regard and even [the former broader unit's leader] was open for those kinds of things. Now, I feel that it's all about implementing, implementing, implementing. What are we implementing? Our central strategy, the things we developed need to be implemented. As soon as we have developed something, isn't it then all about: ‘How many markets are using it?’ That shows that they have to implement what we are giving them.”

This is in accord with my observations of the behavior and focus of the new broader unit's leader. As part of the onboarding to her new unit, each sub-unit guided her through its main concepts and topics. [M2] prepared a presentation together with the whole team, each team member was then supposed to present his or her topic. One of the things, [M2] specifically paid attention to was placing the flags of countries behind each topic or concept that have implemented the concept or program under discussion. The underlying assumption was that the higher the number behind each program the more successful it was. In other words, ethnocentric behavior – in this case expressed by making subsidiaries adopt centrally developed training practices – was about to getting rewarded again. And actually, during the presentation to the

new unit's leader, those programs gained most attention or, put differently, were seen as unproblematic which had a high number of implementation. Those where a low number indicated low levels of implementation, the responsible people had to explain themselves. E2 has an important explanation for that: For him, the new leadership team is lacking the experiences made by the ARE transfer team:

“Well, they haven't dealt with [international subsidiaries] the way we did over the past years within ARE. It was a longer process. Of course, we neither started to say overnight ‘hey, we actually need to listen more carefully to the markets, to adapt ourselves to them and do things together with them.’ They are still at the point of saying: We have developed that and it needs to be implemented. We are again in this dilemma: We tell them that this program is good and they need to recognize that and do it. Our current leadership team doesn't have that on its radar like we already have internalized it. [...] And we currently experience them saying: ‘Why don't the Netherlands have [that]? I cannot accept that!’ Instead of listening to the reasons why the Netherlands don't have that! [...] To engage with our actual target group doesn't count anymore. It doesn't count for them. [...] Direct collaboration isn't wanted. Or at least I haven't sensed it yet.”

What he is depicting here is that the practice transfer of ARE and the different way of interacting with subsidiaries therein, just like it has already been discussed during the intercultural workshop, has helped to initiate a development from an ethnocentric to an ethnorelativistic stage. He explicitly contrasts the ethnorelativistic attitude on the part of the ARE transfer team with the ethnocentric attitude displayed by the new leadership team and even depicts this attitude as not being as far ahead as the team's attitude by using the words “still” and “already”. Thus, this time, there aren't only different cultural realities existing in the ARE team and the non-ARE team but there is another cultural reality added on the part of the new leadership team.

After this essential statement and still in the run of the interview, I shared a question with E2, which I was frequently posing myself at that time: “I always ask myself how to achieve the point that the people who

haven't experienced what we did within the transfer of ARE still can take on the perspective that we have." His answer was:

"Well, you need to let them take part in that spirit. We tried to do that with [M2] during our visit to Spain and the conferences and I think, he has seen the good side about it. The [new broader unit's leader] would have had the same opportunity. But if I do not bother to try to experience it how we work with them, I won't learn it. Then, I just sit on my chair, thinking that everything what I am doing is right and my team has to do it like that, not to mention the markets. [...] I'd say: Experience it! But they are not even interested in that. That's the mistake: That they don't actually engage with the markets."

This again goes in line with the organizational learning literature (Argote 2013; Argyris/Schön 1978; Senge 1990) where the main trigger for learning to take place are experiences – preferably first handed. In an intercultural sense experiencing intercultural interactions practically fosters intercultural learning (Bartel-Radic 2006). What the leadership team is lacking besides the experiences regarding the practice transfer, according to what E2 hints at, is a core component of cultural intelligence: motivation (Ang/van Dyne 2009, p. 6). One of my first observations of the differences between M2's and M1's interaction with subsidiaries adds to this perception: While M1 was always engaged in conversations with international markets on conferences or meetings and additionally encouraged the team to do the same – by, for instance, asking team members to split up during dinner and do not build HQ employee-groups – , M2 either stayed in a group composed only of sub-unit team members or avoided any informal contact by being absent or working on his laptop. According to Ang and van Dyne (2009), motivational cultural intelligence is a source of drive – a person who does not like to be in intercultural situations might avoid engaging in such situations (p. 6). That M2 is just not interested in culture and intercultural cooperation gets also visible from his statement 2 in figure 44: In his opinion, there is no need to change anything regarding the conference setting – although there has been important feedback from subsidiaries of how to set it up in a different, more geocentric way. A

person who is interested into the subsidiary's voice would potentially have remembered that and would at least have had a second thought about the feedback and how it could be integrated into the next conference. At the same time, M2 agrees with my statement that the contact to and cooperation with international markets is the department's main business – there seems to be an inconsistency in rhetoric and actual behavior which is contrary to acting as an authentic role model (Frey et al. 2006; Peus/Frey 2009).

Simultaneously, M2's first statement indicates that, even if he wanted to dedicate effort to further establishing a new way of cooperation with the subsidiaries in a geocentric sense, he would not have the capabilities to do so because different priorities are set by the higher management respectively the company as a whole which he has no influence on. This reminds me of a statement by E3 in the very first interview round in 2018: At that point in time, I was still focusing on the practice transfer and asked her, what potential danger the practice itself and its spirit could face. Her answer was:

„I think that the current situation the company is facing right now triggers deep-rooted traditional behavior patterns, triggers the fear system and might lead to a stop. [...] I don't feel that a deep embedment of the transformation is already reached. It's a fight for survival right now.”

Also later, during the intercultural workshop, E3 referred to the situation of the company and the upcoming changes, stating that corporate communication is triggering the fear system instead of “establishing an authentic openness” which would allow to use this uncertainty productively and establish a good vision. Similarly, E5 mentioned that volatile times obviously trigger behavioral patterns that are the pure opposite of interculturally competent behavior:

“On the one hand, I would love to be the one who is open and co-creative but when I see that there are such tough instructions and hard cuts made that I cannot collaboratively advocate for with clear conscience but that I'm forced to crack the whip... That's not fitting for me. I would love to live interculturality but I'm not sure if that's even possible in the future.”

And indeed, just like it was described in chapter 6.5.1, the automotive industry as a whole and the traditional, long-established German manufacturers in particular were and stayed under great pressure when I entered the company and even more when I finalized my research. One could investigate this in an entire own doctorate, but, potentially, so far, the company had missed to develop new key basic assumptions in the sense of double-loop learning which would impact a change in corporate strategy and thus lead to its survival (Gairing 2017). Gairing (2017) summarizes in his chapter on the current challenges for industrial society resulting from VUCA and the accompanying disruptive changes:

“Profound change requires a de-learning of old patterns and routines. If the prognoses about the upcoming, radical changes are only partly true, this quality of change will be undoubtedly necessary.”<sup>16</sup> (Gairing 2017, p. 182).

A whole stream of organizational crisis research deals with the question of whether companies encounter crisis situations, provoked for instance by external disruptive forces, with innovation and change or, by contrast, with sticking to old and tried solutions and behavioral patterns. Obviously, there are lots of theoretical and empirical arguments for both organizational reactions (Sakar/Osiyevskyy 2018). One would need to investigate that more deeply in order to give a solid answer. But as Wittgenstein is wisely saying “getting hold of the difficulty *deep down* is what is hard” – might hold even truer in unsecure times.

Thus, in order to sum this last data collection up, the HQ sub-unit team saw the benefits of letting subsidiaries participate in providing content on these kinds of training conferences in that it surfaces the great diversity, is appreciative and allows for fertilizing each other. However, it is also clear that this spirit of exchanging and an alternative way of collaboration needs to be sustained and facilitated by the definition of new roles and new practices. For that, management’s commitment and interest is necessary which obviously is not provided. A possible explanation for that is, on the one hand, lacking individual motivation

to engage in intercultural situations and, on the other hand, lacking the experiences and the learnings and developments following on them from the ARE practice transfer. What additionally makes things even more complicated is the state of the automotive industry as a whole which might, in this case, rather foster traditional behaviors and thinking patterns instead of innovation and change.

## 7.2.4 Summary and Discussion

If I had to depict the intercultural organizational development of the sub-unit in a curve and map it against the three temporal brackets, it would look as simple as that:

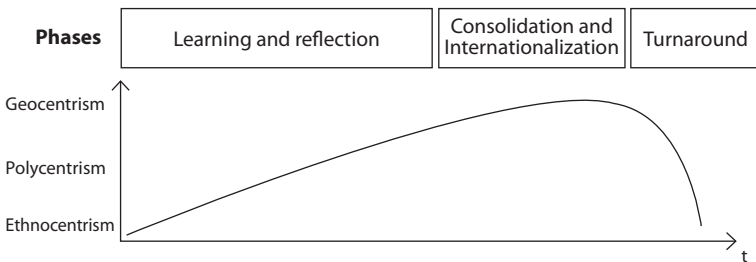


Figure 44 The sub-unit's intercultural organizational development along the three phases

If I now review the curve more carefully, the chronology of the sub-unit's development can be described as follows: A new kind of training practice was developed centrally – new in the sense of being a development program for dealers instead of “just” a training program which is what the department normally takes care for. A training concept was developed in order to transfer the practice. This concept was piloted in several national cultures and organizational cultures which was another new aspect. The experiences made during the pilots led to a change in the team's attitude – forcedly at first and intendedly after some time. My presence and perspective as an interculturalist as well as the closeness to the pilots thanks to my assignment of investigating the transfer to Spain helped moving this forced openness for local adaptations and own solutions to a level of active search for these local ideas. I thus served as a promoter for organizational learning (Bolten 2010). Addi-



tionally, individual and organizational learning was supported by reflections in the shape of interviews, reflective lessons learned workshops and the intercultural workshop I conducted. The later one additionally helped becoming conscious about one's own development, the differences between past and current assumptions as well as thinking ahead and visualizing some future state of intercultural cooperation. In the meantime, subsidiaries and other HQ representatives were confronted with a new way of interacting in order to spread the "spirit", i.e. the ARE transfer culture to more people. A training conference was planned to be designed and conducted in a very geocentric sense, i.e. in close negotiation and participation of subsidiary training managers. In the end, the departure of M1 and E3, the arrival of a new leadership team as well as increased pressure on the industry and the company as a whole stopped and even reversed the development. All in all, the result, thus, is rather disillusioning.

While the ARE transfer team – as well as the team responsible for the normal training business in parts – has realized and learned that power and control doesn't lead to anything respectively that the HQ sub-unit's power is rather limited and that it's more about reaching goals through cooperating on eye-level (see chapter 7.2.2.1), the new sub-unit's context doesn't support this view anymore. The leadership's influence on the strategic orientation and attitude towards subsidiaries (Perlmutter 1969) has become once more clear at numerous occasions during analysis. Potentially, the new leadership acknowledges that there are multiple ways of seeing the world but misses to value them which would be necessary in order to allow this diversity to unfold and produce synergistic outcomes (Adler 2008, p. 107). The constructive understanding of cultural differences that developed within the ARE team and in parts also within the second sub-unit's team does not apply for the new leaders' attitudes. It seems like if the team's culture, characterized by the ARE spirit, that emerged as a result of the experiences and learnings made during the practice' transfer is standing in conflict again with other cultures (Schein 2016), namely the leader's individual culture, but also with the broader company's culture which according to especially E3 and E5 doesn't allow for unfolding in an interculturally efficient way – also because the critical situation of the company seems to foster old

and tried behavioral patterns (Sakar/Osiyevskyy 2018). A new, geocentric way of managing the cultural diversity within the global training community which focuses on viewing it as a resource (Adler 1980) is thus not reached although there have been great tendencies pointing into that direction. Going back to the initially quoted statement of Wittgenstein and E2, who also was conscious about the challenge of pulling others along with the team's learning process and development, the intercultural organizational development needs to happen on various levels and needs to cover a wider scope than "only" a sub-unit team in order to reach true ethnorelativism and a geocentric strategy.



## 8 Discussion

### 8.1 Main empirical insights and contributions from both research phases combined

This chapter intends to summarize the main empirical insights and contributions from both research phases. Finally, the conceptual framework presented in chapter 5 shall be used in order to provide a summary of the empirical findings.

#### **The triangle of context, institutionalization and recontextualization**

The main empirical insights from research phase 1 have already been discussed in chapter 7.1.4. It is nevertheless useful to, once again, refer to the self-enforcing circle composed of the three applied perspectives: the transfer's context, the recontextualization of the practice and its institutionalization. The transfer to Spain is certainly a very positive example of a successful practice transfer. The reasons for that can be found in the nature of all dimensions and factors that emerged as being the most important ones during my investigation of the transfer: the change in HQ transfer strategy that allowed more adaptations and started to actively seek for them, the relationship between the involved parties and the transfer coalition, the shared cognition in the sense of sharing stories of implementations and practical examples and the great compatibility of the practice with the encountered reality regarding different levels; the institutionalization of the practice which was primarily fostered by the members of the transfer coalition and facilitated by the freedom that was granted in order to really make it the recipient's own practice; and the recontextualization of the practice which is closely linked to its internalization and involves the attachment of new, existing meanings originating from the Spanish family- and social-relationships orientation (Rehbein et al. 2009). The analysis showed that it is beneficial to consider various perspectives in order to completely understand the phenomenon of international practice transfer. One could even have

had a look at additional concepts in order to complete the picture even more, such as the boundary spanning concept (Barner-Rasmussen et al. 2014; Birkinshaw et al. 2017; Schotter et al. 2017). It thus contributed to the current literature on international practice transfer by providing an empirical example of a transfer which is well understood from a contextual, a processual and a content-perspective including their interrelations, just like Pettigrew (1978) proposed to proceed when analyzing organizational change. Additionally, it contributed by providing an empirical example for the process of the practice' institutionalization that has been called for (Chiang et al. 2017): Research phase 1 revealed that all three dimensions of implementation, internalization and integration (Ahlvik/Björkman 2015; Björkman/ Lervik 2007) are relevant within the transfer as they first, were actually encountered in the field and second, delivered an indication about the success of the transfer and the practice' institutionalization (Kostova 1999): In this regard, at least for this sample transfer, the dimension of implementation was a necessary condition for the practice' internalization. Trying out the elements of the practice was fostered by the coaches and a number of statements of dealer employees show that this testing of the practice helped gaining commitment as a first step of internalizing the practice. However, implementation in this regard does not necessarily refer to adopting the practice in its original form. At first, it might have been tried out the way it was intended to be by the HQ, but in order to reach internalization, it got recontextualized. Looking at the integration of the practice is another contribution as this last dimension hasn't been paid much attention to so far (Ahlvik/Björkman 2015). Here, results show that integration can happen in three different ways: First, by adapting surrounding or neighboring practices which are somehow connected to the newly introduced practice, such as performance measurement practices; second, by introducing new, supporting practices, such as the Spanish social media challenge; and third, by extending the practice or its core idea to neighboring or related departments, such as the Dutch case of involving the after sales department or the provision of an ARE training for subsidiary stakeholders. All that helped to make the practice stick in its new environment and thereby fostered its institutionalization. The most important insight for this thesis in particular,

however, is the change in the sub-unit's transfer strategy as it informed the nature of the further research process.

### **International practice transfer as facilitator for development**

Among the main overall empirical insights of research phase 2 is the fact that a single project, i.e. the international transfer of the ARE practice, was able to trigger the department's intercultural organizational development – thanks to some supporting effects: First, the team members already displayed a high intercultural competence, fed by both personality traits (Gertsen 1990), past international working experience as well as ongoing and continuous intercultural interactions in their daily work (Bartel-Radic 2013). Second, at least at the beginning, the unit's leadership was of a kind that supported effective intercultural behavior by, for instance, asking employees to actively engage in intercultural situations and serving as a role model for that, that fostered the team's self-leading and active participation in decision-making and a culture of trying out new things and innovative ways of working. Thinking of Frey's principle-based model of leadership (Frey et al. 2006; Peus/Frey 2009), a number of principles seems to have been applied by the leadership team. Third, the way the practice of ARE was transferred to international subsidiaries and dealerships was new for the sub-unit in the sense of involving more than just one pilot country and more than just one dealership as well as by accessing all three organizational levels, i.e. the HQ, subsidiary and dealers, which resulted into being able to observe the actual outcomes of the transfer at the recipient dealer level. The experiences made during this new kind of approaching the transfer of a practice involved both successes and failures (Argote 2013; Senge 1990; Taylor/Osland 2011). Fourth, these experiences were reflected on together in dedicated lessons learned workshops as well as in regular ARE transfer meetings which helped learning from them (Bijlsma 2015; Senge 1990; West 1996). They literally – also by investing in my research – dug into their own experiences and unconscious mindsets which facilitates organizational learning tremendously (Argyris/Schön 1978). Fifth, the emerging ARE spirit as a kind of team or project culture additionally fostered a sense of belongingness and commitment to the transfer project among the HQ team members and probably had a positive effect on the team's learning (Bijlsma 2015). Thus, the transfer

of ARE helped develop the sub-unit further in an intercultural sense by drawing on the involved individuals' intercultural competence, joint and direct experiences, collective reflections and a – at least during the first half of the transfer project time – supportive leadership and organizational culture context.

### **Single- and Double-loop learning**

Results additionally show that learning has taken place in both a single-loop and double-loop way: At the beginning, increased flexibility and adaptability of the practice to local circumstances was felt to be needed in order to successfully transfer the practice. Thus, first, the change in the HQ sub-unit's transfer strategy and general approach towards subsidiaries in the sense of leaving more freedom for local adaptations was a rather rational reaction to encountered difficulties during the transfer. This is what single-loop learning constitutes (Argyris/Schön 1987; Bartel-Radic 2013). However, later, as more and more local examples were fed back by the subsidiaries, the sub-unit started to actively want to understand local environments better and seek for these local versions of the practice and feedbacks from local implementations. For instance, subsidiaries were invited to join the reflective lessons learned workshops, to share their individual ARE stories on an international training conference and were even planned to be asked to design another training conference together with the HQ sub-unit in order to better account for their respective needs. These are clear indications for intercultural double-loop learning, where mental modes are changed and ethnorelativistic attitudes emerge for the sake of more effective intercultural behavior (Bartel-Radic 2013). However, the analysis of the interviews conducted after the international training conferences revealed that, in order to keep the flame of mutual learning and geocentric collaboration resulting from double-loop learning alive, there are more supporting practices and roles necessary in order to make it stick in the organization's mental mode. In other words: The organizational memory (Argyris/Schön 1987) has not yet been completely changed in a way that a new member of the organizational unit would have "automatically" been socialized within this new way of thinking.

### **The development's internationalization**

Trying to “extend” the HQ sub-unit's development to international subsidiaries also revealed some interesting insights: First, especially Intervention III displayed the ethnocentric socialization of the subsidiary training managers, that is, the expectation to be treated ethnocentrically by the HQ and to have not much say, for instance, in the design of training conferences. This was primarily shown by the words and expressions used during the presentation of the results of the dream phase, such as “be moved” instead of “go” or “if we could have” instead of “we want to”. Although being asked to think in geocentric terms, the answers nevertheless implied the expectation of further ethnocentric behavior. This shows how deeply rooted this mindset is within the subsidiary actors. It additionally became apparent in some stories that were told by sub-unit team members about subsidiary actors automatically adapting to German behaviors. Second, the heterogeneity of subsidiaries became once more clear, especially in terms of their financial and human resources they are able to dedicate to training issues: While smaller subsidiaries tend to be more dependent on central developments due to less financial and human resources, bigger subsidiaries tend to rely more on local developments and are therefore more happy to shut down in front of the HQ's “sending chain”. Third, as a consequence, smaller subsidiaries potentially are happy with the ethnocentric, one-way communication traditionally practiced by the HQ sub-unit on such training conferences. Others, however, do want to practice more local practice exchange and also do want to geocentrically negotiate the setup of training conferences. Thus, it seems like there is a parallelism of all three international strategies needed in order to account for this heterogeneity encountered with regards to subsidiary environments and needs.

### **Multiple cultures**

Among the main empirical insights of the second research phase is the omnipresence of multiple cultures which are resulting into various inner conflicts of the sub-unit team members: First, multiple, conflicting cultural realities become apparent between the HQ sub-unit and the broader company. Second, they become visible within the sub-unit as there are two teams with different kinds of projects and tasks



that yielded different experiences and learnings. The same accounts for other sub-units of the company. And third, another individual and team culture gets in in the form of the new leadership which holds a different attitude than the present organizational team culture does. I haven't had the notion of multiple cultures in mind when I started to dive deeper into the topic of intercultural organizational development. It merely emerged during my research on constructive interculturality as a modern and necessary way to think of culture (Leung et al. 2005; Maimone 2018; Romani et al. 2018; Söderberg/Holden 2002). As the analysis has shown, obviously, multiple cultural realities have a stake in the intercultural organizational development and therefore need to be included into the conceptual framework that was set up in chapter 5. In this case, the conflicting nature of these multiple cultures is posing an obstacle to the further development of the sub-unit, especially with regards to the new leadership culture.

### **New leader's and the industry context's effect**

Just like the leadership culture was supportive at the beginning, it has also been shown that a new leader who is displaying a different kind of mindset shaped by different experiences or even lacking international experiences as well as lacking the motivation to gain them, by contrast, might stop and even reverse the ongoing development – even if new practices and mental modes already have been established. One might reason that the new, emerging theory-in-use was not yet developed far enough, the organizational memory (Argyris/Schön 1987) has not yet been fully changed or new practices have not yet been practiced long enough, so that a new, leading member would have automatically adopted it. As indicated in the literature, leaders' attitudes have a huge influence on the strategic orientation towards international subsidiaries (Adler 2008; Barmeyer/Maryhofer 2016; Bartlett/Ghoshal 1987; Perlmutter 1969; Stahl/Brannen 2013) and the present research case doesn't contradict this indication. While M1 acted as a role model in terms of not only speaking about the value of cultural diversity but also actively showing behavior enacting it (Frey et al. 2006; Peus/Frey 2009), M2 did agree in the statement of cooperation with international markets being the main task of the organizational sub-unit, but practically didn't seem to take this task that serious – which was also felt and observed

by the team members (see statements by E4, E5 or E2). The reflective interviews after the training conferences revealed that sustaining the initiation of another, more geocentric way of collaboration is the most difficult part of the community's intercultural OD. Again, it all comes down to the institutionalization of an attitude, a mental mode by developing supporting practices and new or different roles (Argyris/Schön 1978; Barmeyer 2010; Bartel-Radic 2013; Bartlett/Ghoshal 1989; Schein 2016). The main conclusion that can be drawn from these reflections is that although there is a still high proportion of team members displaying ethnorelativistic attitudes and the willingness to further proceed towards a geocentric strategy it cannot be sustained if the leadership obviously doesn't support this attitude and as a result, supporting practices and roles aren't installed. Thus, double-loop learning has taken place for the majority of the individual team members, but this is still not sufficient in order to fully reach ethnorelativism and a geocentric strategic orientation on an organizational level. An important stakeholder is missing in this loop as well as additional and new supporting practices and roles as a result from single-loop learning. Or in other words: The sub-unit's psychology, i.e. its explicit and implicit shared values and beliefs, has not that holistically changed, does not account for every single stakeholder within the sub-unit, that it would have a true impact on its physiology and anatomy (Bartlett/Ghoshal 1998). Simultaneously, tough times within the whole automotive industry and the traditional manufactures and their retail network in particular might have an impact on the further development as well in that they lead to favoring already known and practiced behaviors instead of new, uncertain ones (Sakar/Osiyevskyy 2018). Thinking of Pettigrew's (1987) holistic framework to study organizational change, in this case, the influences of the outer context may have become even more obstructive. Additionally, an important aspect of the inner context, namely the department's leadership, has changed completely and is thus embedding the ongoing intercultural OD in a new contextual environment.

Thus, in order to sum all these insights up, the conceptual framework presented in chapter 5 can be complemented as follows with empirical insights:

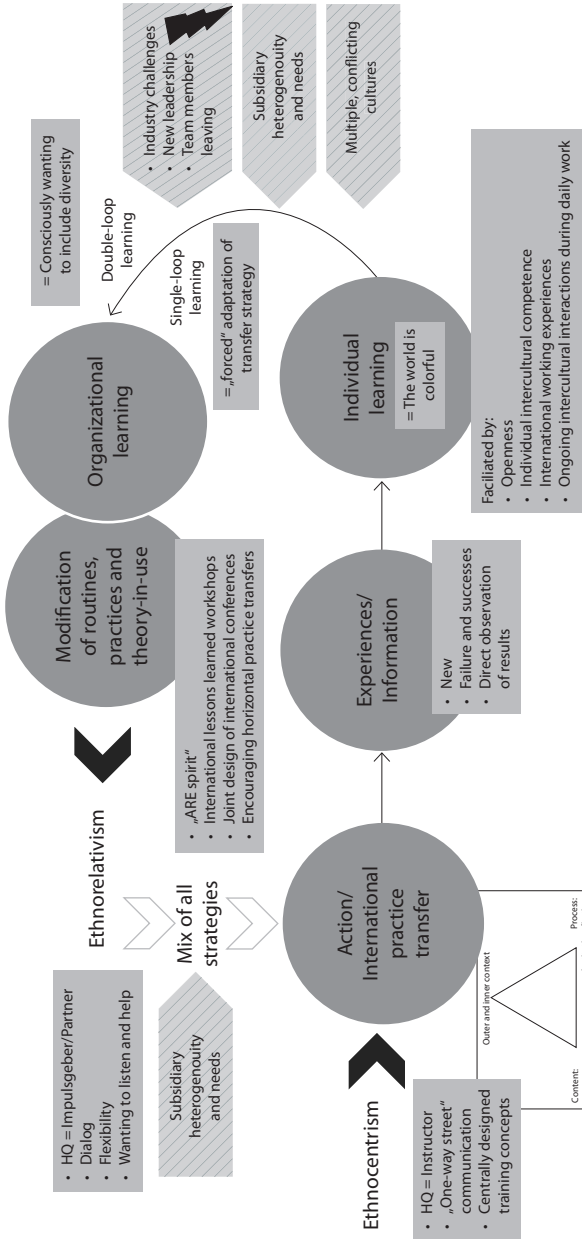


Figure 45 Conceptual framework complemented by main empirical insights

The sub-unit moved from ethnocentrism to ethnorelativism through a process of intercultural learning on both individual and organizational level which was fostered by one particular international transfer project. The hatched arrows point to effects which have been shown to pose an obstacle to the further intercultural development of the sub-unit. Although the sub-unit's culture or orientation towards subsidiaries respectively stood in contrast to other existing cultures within the company, this conflicting multiple culture reality probably wouldn't have had the power to really threaten the further development of the sub-unit. Also, the heterogeneity of the subsidiaries might have confronted the sub-unit with some dilemmas of balancing standardization and localization but the fundamental openness on the part of the team and the learnings they made during the transfer project, would have made them deal with this challenge as well. The industry challenges and the new leadership team, however, had the power to reverse the ongoing development, an effect which was additionally facilitated by the departure of team members who have been essential in fostering the development. The white arrows of the model indicate how the fully institutionalized ethnorelativism potentially would have, in the first place, translated into a mix of international strategies, depending on the needs and characteristics of each respective subsidiary.

Regarding the intercultural organizational development as a whole, there are several scientific contributions made: First, this study is an example of looking at the actual intercultural development of an organizational sub-unit. To the best of my knowledge, no study has retraced this development of ethnocentrism to ethnorelativism respectively a geocentric strategy so far. The intercultural dimension of OD in general has not received much attention until now and its understanding is very limited (Barmeyer 2018). This thesis therefore is an important empirical contribution to this new field and, additionally, provides a conceptual framework of studying it further. Second, the study contributes by looking at the actual development of a single sub-unit. So far, the development of an organization's orientation towards subsidiaries and its supporting organizational structures were – theoretically – conceptualized on a broader, corporate level (Adler 2008; Barmeyer et al. 2012; Bartlett/Ghoshal 1998; Perlmutter 1969). Perlmutter (1969) admit-

tedly notes that the strategies never exist in their pure form but that a company rather has a certain EPR-profile. He therefore also indirectly states that individual functions or projects might apply different strategies. The only empirical example for an organization's development from ethnocentrism to geocentrism I came across equally highlights that it is not the company as a whole but its individual functions that go through this development (Malnight 1995). However, still, these individual functions are located at a very high organizational layer, such as research or marketing. Thus, by looking at a single sub-unit and a specific project team in it, the study contributes by providing a perspective on the smallest organizational layers which constitute "the basic building blocks of an organization" (Beckhard 1969, p. 26). Third, team learning has not yet been empirically investigated that much, i.e. this thesis contributes to a research area which still deserves further investigation (Bijlsma 2015). Last but not least, it provides an in-depth and detailed look at the internal organization of a multinational company which has become relatively rare according to Birkinshaw and colleagues (2011) and allows a look at the difficulties of HQ-subsidary interactions which frequently is not what international companies are willing to examine (d'Iribarne et al. 2020).

The open question now is – after having filled the conceptual framework with empirical results – what actually has happened at the interfaces or more specifically, what exactly constitutes the arrows that are connecting the different notions of practice transfer, experiences and individual and organizational learning. This is where my own impact as a researcher gets in. I already have reflected on my impact and learnings at one or the other occasion during the data analysis section. In the following, I will display my impact, experiences and learnings as a researcher in a condensed manner.

## 8.2 Researcher's impact and learnings

An exceptional feature of this thesis is its research design: It starts with a single case study which naturally transforms into an action research design. An emic view on both research phenomena of international

practice transfer and the intercultural OD came naturally through my ethnographic approach and me being both researcher and practitioner at the same time. Thus, I always took on the insider's perspective (Morris et al. 1999) throughout the whole research period. I fully agree with Buchanan's (2012) and Ridder's (2016) critique of Yin's fixed understanding of case study research as being linear and plannable step-by-step as well as with Christianson's and Whiteman's (2018) and Bansal et al.'s (2018) call for more honest and transparent methodological accounts. As already was described in chapter 6.1 I wasn't able to first find a research gap, read the relevant literature and define a case. Rather, thanks to my contract ethnography I immediately got thrown into the field and got caught by practical questions I decided to find a scientific answer to. The first, practically most pressuring question I came across was: Why is the ARE practice transfer working in some countries, in others not? By taking on the responsibility for the transfer of ARE to Spain, I was able to experience one particular transfer first hand and analyze it from a scientific perspective. Thus, looking at the first arrow between *Action* and *Experiences/Information*, as a researcher, I was collecting information about the specific action by conducting a single case study. While other team members who took over the responsibility for a specific transfer also made their experiences and collected information, I was able to complement their collections by offering an additional, scientific perspective. Thanks to my role as a researcher, I was able to dive much deeper into the transfer and its outcome at recipient unit level, to collect much more information than other team members were able to. While frequently feedback from subsidiaries or recipient units is missing (Barmeyer 2010), I was able to represent the recipient unit's and subsidiary's voice at the HQ. At the same time, as a Spain-loving person and interculturalist I was very engaged in spreading the "intercultural spirit", in enthusing other team members with the beauty of culture and cultural diversity by sharing stories from the Spanish transfer and by spreading additional, more general information on culture and interculturality in the form of science snacks. Admittedly, my interventions fell on fertile soil, or in other words: Inspiring the open and interested ARE team members was not a very difficult undertaking. I find the notion of the *promotor*, which is used by Bol-

ten (2010) in the context of the development of organizational intercultural competence, a very fitting one for describing what I primarily was during the whole research period: I gave impulses which triggered the intercultural OD further. I would thus call myself an *intercultural promotor*, a role I took on during the whole research period. Regarding the second arrow from *Experiences/Information* to *Individual learning*, I offered reflective spaces by interviewing the team members. By withdrawing them from daily business for some time and asking questions, I made them think and articulate what has happened so far and what they had learned. I made them conscious about their own development (see statement of E3 in chapter 7.2.1.2). At the transition from *Individual* to *Organizational learning*, I again acted as an intercultural promotor by constantly applying the intercultural lens and proposing and trying out different, more ethnorelativistic ways of interacting with international subsidiaries as an organizational sub-unit. Intervention II is an example for that. Also, I provided the team with scientific inputs like the explanation of the three international strategies, the dimensions of intercultural competence and the Fürberger Matrix in Intervention I. I cannot prove that my influence on the transition from individual to organizational learning was essential, but it certainly had some kind of positive effect (see, for instance, the statements of E2 in chapter 7.2.3 and of E3 in 7.2.1.1). In Intervention I, I provided much space for reflection on the department's own development from a rather ethnocentric strategy and attitude to more and more ethnorelavistic attitudes and a geocentric strategy. Some statements from chapter 7.2.1.2 indicate first, how unconscious this development happened so far (E5) and second, how – in most of the cases – good this development towards geocentricity is perceived. Potentially, reflecting on the old and new world of qualification helped reassuring that the direction is the right one. Thus, all in all, in both research phases, i.e. as both ethnographic case study researcher and ethnographic action researcher, I contributed to the sub-unit's development by collecting information, providing spaces for individual and collective reflection and functioning as an intercultural promotor. Figure 48 visualizes the reflections on my own researcher's impact on the intercultural OD of the sub-unit.

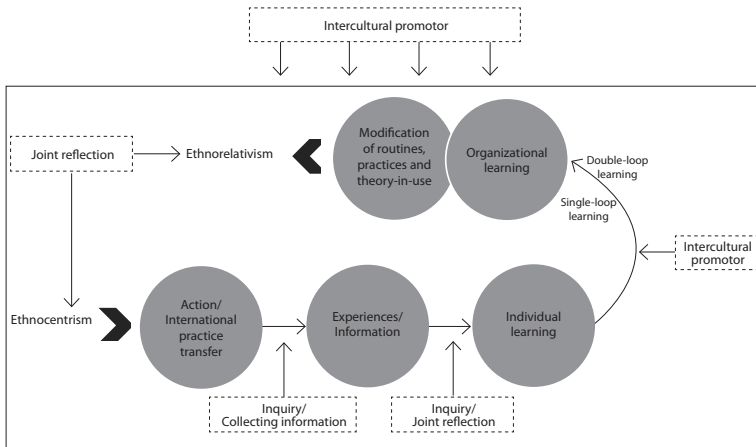


Figure 46 Researcher's impact on the sub-unit's intercultural organizational development

In retrospective, one could term the research project as a whole an action research endeavor, assuming that the close look at the transfer to Spain in research phase 1 surfaced that much information that learning on an organizational team level was facilitated – just like Lewin (1946) and Torbert (1972) highlight the importance of inquiry into action as it leads to learning from experience.

Another important part of an action research dissertation apart from the author's self-reflection is to share one's learnings (Coghlan/Brannick 2014). I already depicted some of them in chapter 6.5.4. What I had to experience myself although I had read about it before is to trust the process of writing, revising and revising again. At numerous occasions I felt lost in my "shapeless data spaghetti" (Langley 1999), unable to detach from my practical experiences in order to apply more abstract and theoretical themes to it. Paired with the highly complex reality I was confronted with, I went through more than one dark hour of frustration and demotivation. However, the process of endlessly revising what I had written so far, diving into the data once more, reading additional literature and drawing uncountable mind maps, process models and meaning systems, finally, brought clarity. In the end, the most difficult step for me was moving from the written story of "what happened" to a synthesis of "what does it mean in scientific terms and how does it



contribute”. I followed Coghlan and Brannick’s advice (2014) and wrote down a chronological story of what happened which already brought various themes to the surface. A continuous back and forth between this story, the conceptual framework I had built and additional literature step by step allowed the scientific abstraction and objectivity from my part and subsequently the transformation of the story to the final empirical analysis.

Another learning I was able to experience myself is that an action research project really means “designing the plane while flying it”, like a chapter in Herr and Anderson’s guide for doctoral students (2015) describes. I frequently thought – not just in the second research phase but also before that, during the rather “classical” case study approach – that I might not be a good researcher. This feeling became particularly apparent whenever I talked to other doctoral students or researchers who then, for instance, posed questions like “I have such a big amount of codes in MAXQDA, it’s a huge mess. How many codes do you have?” or “What? You haven’t read xy yet? But that’s like the most important author for your topic!” All this left me with the very uncomfortable feeling of not being scientific enough, of doing research too intuitively and being too close to practice. I don’t remember how many times I therefore excused myself for holding another “too practical” presentation in the doctoral colloquiums, “still lacking the link to the scientific perspective”. Reading the chapter *Designing the plane while flying it* made me think that that’s exactly what I have been doing all the time – and that this is simply a very normal part of an action research process! Very often, I had to react fast, I then just wasn’t able to read relevant literature or carefully think through an interview guideline not to speak of planning the whole research process. The art then is “just” to transfer these experiences into a body of knowledge, to find connections of what I have been doing mostly intuitively to practices and theories in order to legitimate it and thus to “scientificate” my rather practical research.

Apart from the learnings I made as an action researcher I also sense some missed opportunities. Given the great interest on the part of the sub-unit team members into the topic of interculturality that has become, among others, apparent in the intercultural workshop, I could have involved them much more into their own action research apart

from joint reflections. In my own defense, however, the research context became less open for my interventions when the new leadership team took over. The opportunities for joint research, otherwise, would have been completely different.

In sum, my recommendation for future doctoral students who benefit from a similar kind of contract ethnography and/or action research opportunity is above all to encounter the project's organizational context with openness and curiosity in order to be able to tackle issues of pressuring concern in cooperation with practitioners.

### 8.3 Limitations and future research

Of course, this thesis also has some limitations. The first one relates to theoretical concepts and notions that could have been paid (more) attention to. For instance, the notion of boundary spanning (Barner-Rasmussen et al. 2014; Birkinshaw et al. 2017; Schotter et al. 2017) was neglected although the newly introduced role of the country coach as an important stakeholder within the practice transfer would have made it more than reasonable to take a look at it and its effects. Also, although leadership was shown to have a major influence in the department's intercultural OD, the literature on leadership wasn't reviewed. Frey's principle-based model of leadership (Frey et al. 2006; Peus/Frey 2009) is the only representative of the vast amount of theories and literature on the topic of leadership. The same accounts for the topic of organizational culture as well as national culture. However, the notion of organizational culture was touched on due to its close relationship to organizational learning in 4.1.1 and 7.2.1.1. Similarly, the notion of national culture constantly resonates when talking about recontextualization or a constructive understanding of culture, for instance. A more explicit account for these two topics would nevertheless be useful.

The second limitation relates to the depth with which the conceptual framework was filled with empirical data. There is lots of data that illustrates the ethnocentric starting point of the sub-unit's development as well as its tendency to develop towards ethnorelativism. There is also lots of data which describes the practice transfer to Spain in detail.

There is some data about individual learnings that were taken away from the transfer. By contrast, there is not much data that supports the notions of single-loop and double-loop learning on organizational level. Thus, important parts of the conceptual framework stay at a rather superficial level and could have been tackled more extensively. However, thinking of “designing the plane while flying it”, very often, I had to take fast decisions and very often the developments of the practical context outpaced my scientific preparation for being able to investigate it better. That is, learning happened empirically but it was investigated scientifically only on a superficial level.

Another limitation is, of course, that I wasn’t really able to investigate the international extension of the development further. In order to be truly intercultural, a full involvement of international subsidiaries would have been necessary. Rather, the focus of attention laid on the HQ sub-unit’s development from ethnocentric to ethnorelativistic attitudes and supporting practices – which of course affected subsidiaries as well. The subsidiary view was only addressed by intervention III and only to a very limited extent due to the restrictions made by the new leadership.

Similarly, I could have investigated more into the differences between the ARE team and the team responsible for the normal training business at the HQ. There emerged some differentiating characteristics, such as the exact event that triggered the intercultural development (ARE vs. the advent of M1) or the differently perceived tension between the sub-unit and HQ attitudes and strategies. It would have been more than reasonable to ask the question about how different the development lines really are and where they potentially met in order to merge into one organizational learning and development towards shared practices and mindsets. Actually, the differentiation is paid a certain attention to but also merely stays at a superficial level.

Also, an even more extended period of research would have been needed in order to observe the further development: How might a next training conference have looked like? Might the ARE team have resisted the new leadership in some way and might it have tried to let the new leaders take part somehow in their experiences and learning in order to “lift” them to their development stage? Or might they just have given up? Might someone else than myself have taken on the role of the intercultural

tural promotor? How might future transfers have looked like based on the learnings made within the team? Might the newly initiated transfers have reflected an increased ethnorelativism? How might the characteristics of new world of qualification have been sustained? Might the subsidiaries have demanded more ethnorelativistic behavior based on Intervention III? Or might they have continued to adapt to HQ behavior? All these questions aren't answered by the present study. However, the answers to them are necessary in order to finally assess the training community's intercultural OD.

Thus, to sum up, this study can only be the beginning of further research in this regard. Future research could engage in further investigating the dynamics of intercultural OD at both HQ and subsidiaries and conduct research on the learning processes that happen on both sides. It needs to be longitudinal in order to gain a full picture of the development and its impacts on the intercultural behavior. That is, the conceptual framework can indeed be taken as a basis for future research and may be extended by closing the circle to see how newly emerged organizational practices and mindsets actually translate into action and by actively involving the subsidiary perspective.

## 8.4 Practical Implications

There are numerous practical implications resulting from this study. First, for practitioners who are involved in international projects, it is essential to reflect on the own organization's strategic orientation towards international subsidiaries and on how this orientation is perceived by the international partners. And it's not only that: The study has shown that subsidiaries are highly heterogeneous and that there is no simple way of designing intercultural interactions. A close examination of local environments, needs and expectations is needed in order to find the best strategic answer from the HQ side. In other words: For making intercultural interaction work in a good way for all parties involved, its simply necessary to dedicate effort to getting to know each other. D'Iribarne et al. (2020) put it like that:

“Plunging into the universe of each culture, focusing on its wealth and its complexity, shows the extent to which it is unrealistic to seek to grasp it in a few words. A real intellectual engagement is necessary, such as that required to learn a language. And this is the only way for managers to be able to make the best use of the potential of each culture.” (p. 51)

Second, leaders of teams which operate internationally but of course also leaders in all kinds of operations, shall be aware of their big influence in all kind of regards. In the present study’s case, the new leadership provoked a stop of the ongoing intercultural OD and even a return to traditional behaviors. Even in case that individual motivation to engage in intercultural situations might not be well developed, a new leader nevertheless shall be sensitive to the team’s past experiences that have formed its current mindset and culture (Schein 2016).

Third, for organizational teams in general, it has been shown to be highly useful to take time for collective reflection. Just like the literature on team learning points out, it’s the reflection on own behavior and action that brings about development and change (Chein et al. 1948; Lewin 1946; Roth/Bradbury 2008). In today’s complex business world, it’s an imperative for organizations to rethink their current mental modes and bring about double-loop learning (Gairing 2017). What might also be beneficial for both research and practice is to benefit from the support of an action researcher whose specific dedication is to take care for that these reflective spaces are provided and to accompany the intended development with scientific impulses and interventions. This is what Lewin (1946) and all other great thinkers in the field of action research are convinced of: that the collaboration of practitioners and scientists in handling a certain problem is what really brings about change.

## 8.5 Conclusion

Looking back to the very first, introductory quotation of this thesis which introduced the motivation behind engaging with the present study allows to résumé the following: First, the *curiosity* that triggered

the investigation into the two fields of research and their relatedness is largely satisfied. I was able to dive deeply into one particular international practice transfer, looking at it from a variety of perspectives which, taken as a whole, allowed to explain pretty well, why the transfer evolved like it did and what effects might be working in an international transfer. I further was able to go even deeper into one of the factors that were shown to be very powerful within the transfer and investigated the development and learning process of my sub-unit from ethnocentrism to ethnorelativism and its supporting strategy towards international subsidiaries. Here, my curiosity is not completely satisfied. I would have loved to further accompany the sub-unit's intercultural interactions. I would have loved to see whether – despite the turnaround – some aspects of the newly developed, individually held values and assumptions survived and were maybe lifted to an organizational level by, for instance, designing a future training conference differently. I would have loved to conduct a truly intercultural workshop with both HQ sub-unit and subsidiary in order to jointly reflect on current values, assumptions and practices and dream of, design and destine a geocentric way of collaborating in a real appreciative inquiry. I would have loved to see if cultural complementarity and synergy was possible. But probably, it's every researcher's destiny to withdraw at some point and no one ever might feel that his or her work is fully completed. I also got to some kind of *orderliness* which was, like it was described in chapter 8.2 a particularly difficult task, primarily for research phase 2. While research phase 1 provided with a quite comprehensible, simple and holistic order from the very beginning, the second research phase was more complex, involved more stakeholders, many more concepts to be taken into account, more emerging themes which were shown to be highly relevant but which also increased complexity a lot more as well as a very heterogeneous data set which made its analysis a complicated but also exciting endeavor. The result is a kind of order which tries to be holistic and encompassing and knows that organizational and cultural realities are highly dynamic. The *practicality* which motivated my research, however, is not completely given. In the first two temporal brackets of learning and reflection and consolidation and internalization, I really did feel that my research “is making the difference”, i.e. that

I was able to trigger reflections, learnings and a development towards higher ethno relativism within the sub-unit for the sake of making intercultural interactions more appreciating and synergistic. This feeling got lost during the turnaround and is now leaving me rather dissatisfied. The last reflections from the team encourage this feeling even more. Comforting, however, is Perlmutter's (1969) statement, made more than 50 years ago, that the "route to pervasive geocentric thinking is long and tortuous" and it is "not accomplished in a short span of time" (p. 16). Equally, Barmeyer and Mayrhofer (2016) describe the transition of individual ethno relativism to an organizational level as a challenging undertaking as well as Bartlett and Ghoshal's (1989) who state that a transnational organization "is not easy to develop and manage" (p. 66). The organization's outer and inner context and individual intercultural competencies and motivations need to be of a certain kind and interact in such a beneficial manner in order to reach a mindset and international strategy which increasingly *is* becoming real and represents the best response to complex and changing environments.

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# 10 Annex

## 10.1 List of interview partners

| <b>Interviewee</b>    | <b>Origin</b> | <b>Nationality</b> |
|-----------------------|---------------|--------------------|
| Employee 1 (E1)       | HQ            | German             |
| Employee 2 (E2)       | HQ            | German             |
| Employee 3 (E3)       | HQ            | German             |
| Employee 4 (E4)       | HQ            | German             |
| Employee 5 (E5)       | HQ            | German             |
| Employee 6 (E6)       | HQ            | German             |
| Employee 7 (E7)       | HQ            | German             |
| Employee 8 (E8)       | HQ            | German             |
| Manager 1 (M1)        | HQ            | German             |
| Manager 2 (M2)        | HQ            | German             |
| Employee 9 (E9)       | HQ-External   | German             |
| Employee 10 (E10)     | HQ-External   | German             |
| ARE Project Lead      | NSC Spain     | French             |
| Coach 1 (C1)          | NSC Spain     | Spanish            |
| Coach 2 (C2)          | NSC Spain     | Spanish            |
| Countrycoach (CC)     | NSC Spain     | Spanish            |
| Sales Manager 1 (SM1) | Madrid        | Spanish            |
| Employee 1 (E1)       | Madrid        | Spanish            |
| Employee 2 (E2)       | Madrid        | Spanish            |
| Employee 3 (E3)       | Madrid        | Spanish            |
| Employee 4 (E4)       | Madrid        | Spanish            |
| Sales Manager 2 (SM2) | Zaragoza      | Spanish            |
| Employee 1 (E1)       | Zaragoza      | Spanish            |
| Employee 2 (E2)       | Zaragoza      | Spanish            |
| Employee 3 (E3)       | Zaragoza      | Spanish            |
| Employee 4 (E4)       | Zaragoza      | Spanish            |
| Employee 5 (E5)       | Zaragoza      | Spanish            |
| Employee 6 (E6)       | Zaragoza      | Spanish            |
| Employee 7 (E7)       | Zaragoza      | Spanish            |

| <b>Interviewee</b>    | <b>Origin</b> | <b>Nationality</b> |
|-----------------------|---------------|--------------------|
| Sales Manager 3 (SM3) | Bilbao        | Spanish            |
| Employee 1 (E1)       | Bilbao        | Spanish            |
| Employee 2 (E2)       | Bilbao        | Spanish            |
| Employee 3 (E3)       | Bilbao        | Spanish            |
| Employee 4 (E4)       | Bilbao        | Spanish            |
| Employee 5 (E5)       | Bilbao        | Spanish            |
| Employee 6 (E6)       | Bilbao        | Spanish            |
| Employee 7 (E7)       | Bilbao        | Spanish            |

## 10.2 List of internal documents

|   | <b>Document name</b>   |
|---|--|
| 1 | HR figures, February 2020  |
| 1 | Facts and Strategy, October 2019                                 |
| 2 | Business Model, September 2019                                   |
| 3 | Brand Strategy, 2017   |
| 4 | Brand Strategy, 2019   |
| 5 | Implementation Report Zaragoza, June 2018                        |
| 6 | Implementation Report Bilbao, June 2018                          |
| 7 | Implementation Report Madrid, June 2018                          |
| 8 | Findings summary ARE Pilot Lessons Learned Workshop, August 2018 |
| 9 | Sub-unit overview, January 2019                                  |

## 10.3 Interview guidelines from research phase 1

### 10.3.1 HQ Employees

#### **Intro**

1. Seit wann bist du Teil des Projektteams ARE?
2. Was gefällt dir an diesem Projekt am meisten/wenigsten?
3. Was bedeutet ARE für dich? Was ist für dich die grundlegende Idee? Was ist für dich die ARE-Philosophie?

**Rolle**

4. Was ist deine Rolle in dem Projekt? Wie trägst du zum Transfer des Konzepts ARE bei?
5. Wie glaubst du beeinflusst deine bisherige Arbeit in einer international ausgerichteten Abteilung die Arbeit in diesem Projekt?

**Transfer**

6. Wie würdest du die Strategie beschreiben, mit der ARE transferiert wird? Was sind grundlegende Gedanken/Annahmen/Weltanschauungen, die dem Transfer zugrunde liegen (Ethnozentrismus/-relativismus, Power & Resources, Pull vs. Push)? Warum?
7. Warum gibt es deiner Meinung nach das Bedürfnis ARE genauso überall umzusetzen wie wir es uns ausgedacht haben?
8. Hat sich an der Strategie im Laufe der (Pilot-)Zeit etwas geändert? Ist deine Einstellung gegenüber der Herangehensweise an den Transfer eine andere als noch zu Beginn der Piloten? Wenn ja, warum?
9. Welche Herausforderungen siehst du bei der Implementierung auf Importeurs-/Händlerebene?
10. Welche Herausforderungen siehst du bei uns intern, die die Implementierung möglicherweise behindern?
11. Welche Faktoren beeinflussen den Erfolg des Transfers am meisten?
12. Was können wir als Zentrale noch besser steuern/anders angehen, damit der Transfer ein Erfolg wird?
13. Welche Mittel haben wir, um eine Umsetzung von ARE durchzusetzen (Power & Resources)?
14. Was glaubst du muss außer dem bloßen Transfer von ARE noch passieren, damit ARE nachhaltig in den Händlerbetrieben umgesetzt wird?

### **Adaptation/Reconstruction**

15. Hat sich an der Bedeutung mancher Konzeptbausteine (Experience Elements, Rollen) etwas geändert im Laufe der Zeit? (z.B. Bedeutung der Host) Warum?
16. Wie offen bist du dafür, dass Dinge im Markt angepasst werden? Warum (nicht)?

### **Beziehungen**

17. Mit welchen Märkten und Personen hattest du vor allem Kontakt im Rahmen des Projekts?
18. Wie würdest du deine Beziehung zu diesen Personen beschreiben?
19. Wie glaubst du hat diese Beziehung den Transfer beeinflusst?
20. Was glaubst du, wie viel Macht haben wir als AG über die Importeure?

## **10.3.2 Dealership staff**

1. Desde cuando trabajas aquí?
2. Como te informaron sobre el proyecto ARE?
3. Que tal ahora después de unos meses de implementación?
4. Cual es la idea principal del proyecto?
5. Como describirías tu propio rol?
6. Cual es la cosa que más de gusta del proyecto? Cual es la que te gusta menos?
7. Había algún aspecto del concepto del proyecto que al inicio no entendiste o que te sonaba raro?
8. Crees que el concepto se aplica bien al contexto español?
9. Como lo reciben los clientes?
10. Tienes la sensación de que puedes aportar ideas propias al concepto o ya era más fijado?
11. Hay algo que habéis adaptado?
12. Ves algún obstáculo o dificultades todavía en cuanto a la implementación?

### 10.3.3 Coaches

1. Me puedes contar un poco como iba todo con el Proyecto ARE desde el momento en el que has oído de ARE por primera vez?
2. Había algún momento en el que pensaste que es muy alemán y que no se aplica bien al contexto español?
3. Cómo os lleváis en el equipo de coach?
4. Que es lo que más te gusta del concepto ARE? Que es lo que menos te gusta?
5. Cual es la idea principal para ti?
6. Me puedes contar un poco cómo los concesionarios llevan el proyecto de tu punto de vista?
7. Notas que los empleados de los concesionarios tienen la impresión de que pueden aportar ideas propias al proyecto?
8. Crees que lo han interiorizado?
9. Dirías que el concepto se ajusta bien a las necesidades de los clientes españoles?
10. Dirías que vas a hacer algo de otra forma en las formaciones o en la implementación si van a entrar más concesionarios al proyecto?





So far, the field of intercultural organizational development hasn't received much attention in international business research but shall be the core focus of this dissertation. Triggered by the transfer of a sales practice to Spain and other countries, an organizational unit of a German automobile manufacturer develops a more and more ethnorelativistic attitude towards its international subsidiaries through processes of intercultural learning.

The author, first, ethnographically studies the international practice transfer to Spain. A central observation are the resulting intercultural learning processes on the part of headquarter actors. In the following, the author focuses her attention on this ongoing development, supporting it even more by enacting an action research approach.

This dissertation contributes by introducing an urgently needed empirical example in the field of intercultural development. Additionally, it expands the field of international practice transfer by not only looking at changes at recipient unit level but by also investigating the transfer's reverse impact on headquarter actors.

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