



NTNU – Trondheim
Norwegian University of
Science and Technology

Implementation of Management Concepts within Multinational Corporations

A Case Study of Communities of Practice in a
Norwegian Automobile Subsidiary Facing a
Management Concept

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PREFACE

This is the result of our master's thesis in the final course TIØ4950 - Strategic Change Management, at the Norwegian University of Science and Technology, NTNU. The aim has been to develop in-depth knowledge on core issues of organizations by addressing actual development challenges in a company. This is done by finding and reading relevant literature, choosing and using an applicable research design and methodology, and applying these on the specific case, as delineated in this scientific report.

The case company of our project is a Norwegian manufacturer of parts for the global automotive industry. Almost four years ago, this company became part of a multinational corporation that is present in 38 countries worldwide, and with headquarters situated in a Central European country. We have studied the company, looking at their change efforts in implementing a management concept that is developed at the headquarters. Data has been collected in multiple ways, such as through a short term employment at the plant, interviews with more than a hundred employees, observations, and field notes from previous studies of the company.

We want to thank our supervisor, Monica Rolfsen, for excellent guidance, and Jonas Ingvaldsen for valuable input during the whole process. We would further like to express our gratitude to co-workers in a project on Lean Production for providing us with relevant empirical data. Furthermore, we have been thoroughly grateful for the opportunity to present some of our work at the International Workshop of Team Working in the Netherlands, November 2013 and at the International Conference on Organizational Learning, Knowledge and Capabilities in Oslo, April 2014. Finally, we would like to thank the case company for providing us with the needed information and for letting us work at the plant, and especially thanks to all the inspiring employees that we have gotten to know.

Trondheim, June 2014,

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EXECUTIVE SUMMARY

Due to increased competition and fluctuations in the highly globalized business environments, managing change has become a key to organizational success. However, changing organizations is difficult. As a consequence, the world has witnessed an ever-increasing focus on management concepts, or fads, that promise success. As such practices are complicated to transfer, especially across national borders within multinational corporations, this is a topic of high current interest. The purpose of this thesis has been to address possible explanations for difficulties in implementation of management concepts within multinational corporations. Not only must the transfer from the headquarters to a subsidiary be understood, but also the further transfer with respect to local stakeholders within the recipient company. Companies constitute a range of different social configurations which can be identified as 'communities of practice' with respect to a set of unique characteristics. Identifying and analysing such social configurations within the subsidiary is thus a fruitful approach to gain an understanding of the further transfer of the concept within the case company. This thesis explores the organizational dynamics that emerge as community of practice within a subsidiary of a multinational corporation (MNC) is being faced with a management concept which is developed at the foreign headquarters.

This is a single case study of communities of practice within a subsidiary; a Norwegian automobile company, implementing the management concept of the MNC, which based on principles of 'Lean Production'. The implementation of this concept in the subsidiary has not been entirely successful, as many difficulties have occurred. For this reason, the thesis aims to address the possible explanations for the experienced difficulties. Data has been gathered during a period of several years – from March of 2010 to October of 2013. This has mainly been done through a research project on 'lean', in which the case company is a participating actor. Interviews and observation studies have been conducted, in addition to the writers' short-term employment in one of the units at the case company during three weeks in May 2013. Few empirical studies have been conducted on the implementation of management concepts seen from the recipient's point of view. Due to the wide access to data gathered over several years, in addition to the authors having worked at the plant, this report provides an in-depth understanding of the specific company and the challenges it is facing.

In order to carry out the analyses, a literature study was conducted on previous and current research on organizational change, management concepts and fads, implementation of concepts, the content and contextual embeddedness of transfer, and communities of practice. As the main research question is highly complex and comprehensive, six subordinate questions have been derived. For this reason, each chapter of the case study is dedicated to provide an answer to one of these, respectively. The different analyses all expand on the previous ones, but focusing mainly on the specific topic of chapter.

By drawing connections between the respective analyses, five main findings can be drawn from this study. Firstly, there is a misfit between the concept and the implementation; the concept attempts to facilitate involvement and communication, although employees are not involved in the process of implementing the concept, and the essence of the concept is not communicated to a sufficient degree. Secondly, there is a poor assessment of the employees' responses to the change efforts, as the negative response cannot only be explained as result of the concept in itself, but also of the way it is being implemented. Thirdly, the role of mid-level management is identified as problematic, since it functions as what can be conceptualized as a "buffer of hypocrisy". Fourthly, the concept is implemented, although not yet institutionalized. The use of elements of the management concept is not alone a confirmation of a successful implementation. Finally, the community of practice in itself is an obstacle to the implementation of the concept, as it resists interference from the outside. Consequently, due to the complexity of the transfer, this thesis has demonstrated that there is a wide range of different aspects that should be addressed in order to understand and thus prevent the difficulties of the implementation.

For the case company, these findings would add to the understanding of the experienced difficulties, and thus form the basis for further implementation and organizational change of the company in general. In addition, this study provides contributions to the literature in form of three frameworks for identifying communities of practice, comparing communities of practice, and finally, examining the occurring tensions as a community of practice faces a management concept. Although the master's thesis describes a contemporary phenomenon in a single company, these developed theoretical frameworks are considered useful also for other studies on similar issues.

SAMMENDRAG

Som en følge av økt konkurranse og svingninger i dagens globaliserte markeder har det blitt stadig viktigere å kunne endre seg for å oppnå organisatorisk suksess. Det å endre organisasjoner er imidlertid vanskelig. Som en konsekvens har verden vært vitne til et stadig økende fokus på ledelseskonsepter, eller -trender, som lover suksess. Ettersom at slike praksiser er vanskelige å overføre, spesielt på tvers av landegrenser innen multinasjonale selskaper, er dette et høyst aktuelt tema. Målet med denne avhandlingen har vært å finne mulige forklaringer for vanskeligheter i implementasjon av ledelseskonsepter i multinasjonale selskaper. Ikke bare må overføringen forstås fra hovedkontoret til datterselskapet, men også med tanke på den videre overføringen til lokale aktører innad i selskapet som mottar konseptet. Bedrifter består av mange ulike sosiale konfigurasjoner som, gjennom sine unike karakteristikk, kan bli identifisert som 'praksisfelleskap'. Det å identifisere og analysere slike sosiale konfigurasjoner i datterselskapene er derfor en god tilnærming for å forstå den videre overføringen av konseptet. Denne avhandlingen utforsker de organisatoriske dynamikkene som oppstår når praksisfelleskap i et selskap av et multinasjonalt konsern (MNC) møter et ledelseskonsept som er utviklet av det utenlandske hovedkontoret.

Denne er en enkeltsaks case-studie av praksisfelleskap i et datterselskap, en norsk bedrift i bilbransjen, som implementerer konsernets ledelseskonsept basert på prinsippene til 'Lean Production'. Implementasjonen av dette konseptet i datterselskapet har ikke vært utelukkende suksessfull, og mange vanskeligheter har oppstått. Av den grunn har denne avhandlingen som mål å undersøke de mulige forklaringene på de erfarte vanskelighetene. Datamateriale har blitt samlet inn under en periode på flere år – fra mars 2010 til oktober 2013. Dette har i hovedsak blitt gjort gjennom et forskningsprosjekt om 'lean', hvor case-bedriften er en av flere deltakende aktører. Intervjuer og observasjonsstudier har blitt utført, i tillegg til at forfatterne i mai 2013 jobbet tre uker i en av case-bedriftens avdelinger. Få empiriske studier har blitt utført på implementering av ledelseskonsepter sett fra en mottakende enhet sitt perspektiv. På bakgrunn av stor tilgang til datamateriale som er samlet inn over flere år, i tillegg til at forfatterne har jobbet på fabrikken, gir denne rapporten en unik forståelse av den aktuelle bedriften og utfordringene den står ovenfor.

For å kunne utføre analysene er en litteraturstudie blitt utført basert på aktuell forskning om organisatorisk endring, ledelseskonsepter og trender, implementasjon av konsepter, innholdsmessige og kontekstuelle faktorer av overføring, og til slutt praksisfelleskap. Siden det overordnede forskningsspørsmålet er komplekst og omfattende, er det inndelt i seks underspørsmål. Av den grunn har hvert kapittel i case-studien til hensikt å gi svar på hvert av disse. De ulike analysene bygger på hverandre, men de fokuserer i hovedsak på det aktuelle temaet i kapitlet.

På grunnlag av disse analysene kan man trekke ut fem hovedfunn fra denne studien. Først og fremst er det en mistilpasning mellom konseptet og implementeringen. Konseptet har som mål å legge til rette for involvering og kommunikasjon, på tross av at de ansatte ikke blir involvert i implementeringen av konseptet og at essensen av konseptet er ikke tilstrekkelig kommunisert. For det andre har det vært en dårlig vurdering av de ansattes reaksjoner på endringen, siden de negative reaksjonene ikke bare kan forklares som et resultat av konseptet i seg selv, men også av måten det blir implementert på. For det tredje er rollen til mellomledelsen identifisert som problematisk, da den kan sies å fungere som en "buffer av hykleri". For det fjerde er konseptet implementert, men ikke ennå institusjonalisert. Bruk av elementer fra ledelseskonseptet er ikke alene en bekreftelse på en suksessfull implementering. Avslutningsvis er praksisfelleskapet i seg selv identifisert som en hindring for implementeringen av konseptet, ettersom det motsetter seg påvirkning utenfra. Følgelig, på grunn av kompleksiteten i overføringen, har denne avhandlingen demonstrert at det er mange ulike aspekter som må tas til vurdering for å kunne forstå og avverge vanskelighetene i implementasjonen.

For case-bedriften vil disse funnene bidra til forståelsen av de opplevde vanskelighetene, og på denne måten danne et grunnlag for videre implementering og annen organisatorisk endring i bedriften. I tillegg gir denne studien bidrag til litteraturen i form av tre rammeverk for å kunne identifisere praksisfelleskap, sammenligne praksisfelleskap og til slutt, undersøke spenningene som oppstår når et praksisfelleskap blir møtt av et ledelseskonsept. Selv om denne masteravhandlingen beskriver et gitt fenomen i en spesifikk bedrift, er disse rammeverkene ansett som nyttige også for andre studier på lignende tema.

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Chapter 1:

INTRODUCTION

The ever-increasing fluctuations in present business environments have made the ability to change a key to organizational success (Burnes, 2005), and today's organizations seem to recognize that the options are to change or die (Beer and Nohria, 2000a). Since many organizations are trying to change, enormous amounts of resources are invested in these change efforts worldwide. Organizations do, however, tend to find change difficult, and only few of change efforts are considered very successful (e.g. Kotter, 1995). In fact, Beer and Nohria (2000a) argue that as much as "70 % of all change initiatives fail" (p. 133). This has led to a persistent discussion of the most appropriate ways to manage organizational change (Burnes, 2005). For these reasons, gaining an understanding of occurring difficulties of change efforts is a matter of great importance.

1.1 Theoretical background

As a consequence of the increased focus on organizational change, the world has since the late 1970s witnessed a considerable increase the phenomenon of management concepts or fads. These are described as concepts that promise success (Birnbaum, 2000), and for this reason become fashionable among managers worldwide. Although descriptions of the concepts themselves are numerous, there is a scarcity in literature regarding the actual implementation of such concepts (Carson, Lanier, Carson, & Guidry, 2000; Clark, 2004). Consequently, management fashion literature seems to ignore organizational implications of the fads: Little is known about how management fads are processed in different domains (Clark, 2004), and if studied, the processes of implementing management practices have mostly been examined from the supplier's perspective (Benders & van Veen, 2001). By not giving careful attention to the demand side, existing research has left the client organization merely a passive consumer of the concept. The literature also tends to treat implementation of management concepts as though it was pure technology, which is, in our opinion, an oversimplified perspective.

As the tide of globalization surges, there has also been an increased interest in how multinational corporations (MNCs) transfer their management concepts and practices from one country to another. This issue is less examined; even if much is written about cross-national transfer. One theoretical position is that MNCs are standardizing their practices from the country of origin and to all their subsidiaries across national borders (Ritzer, 1996), thus making practices globally standardized. Others claim that even the most global companies remain deeply rooted in their own national business system (Almond, 2011). Within this position, practices are complicated if not impossible to transfer, due to different contexts and interpretations. As it will always have to be changed when moved into a different context, it is stressed that a practice has to be translated rather than transferred (Czarniawska & Sevón, 2005). That is, alignment with existing practices inherent at the recipient unit is eventually the key for successful implementation.

Identifying and analysing communities of practice within the subsidiary is a fruitful approach to gaining such an understanding. The focus on communities of practice as a key to improve performance of organizations is under constant increase (Wenger, McDermott, & Snyder, 2002). Communities of practice are defined as “groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis” (Wenger et al., 2002, p. 4). Rationalization, for instance through the implementation of a management concept, tends to make knowledge explicit and standardize work routines in order to make them manageable and objects of cumulative ‘continuous improvement’ (Anand, Ward, Tatikonda, & Schilling, 2009). It can thus be incompatible with the informal, mutual learning processes described within communities of practice theory. We therefore argue that a throughout analysis of the implementation of management concepts within MNCs not only concerns the transfer from the headquarters to the subsidiary as a whole, but also the further transfer within the recipient unit, that is, to the members within different communities of practice. We thus want to combine the theoretical positions of organizational change, management concepts, multinational corporations, and communities of practice, assessing the difficulties experienced when implementing a management concept in a particular company.

1.2 The case

The empirical material of this study is from a Norwegian company that specializes in manufacturing parts for the global automobile industry; an industry characterised by high competition and low margins (Holweg & Pil, 2005). In January 2010 this plant was acquired by a large multinational corporation with companies in 38 countries worldwide, and whose headquarters are located in a central European country. This corporation has developed its own production system, or management concept, based on main elements from lean; a concept we choose to call Lean Enterprise. As a consequence of the current change in ownership, the case company has had to adapt to this system, and efforts have been made in the past four years to implement this corporation specific concept in the plant's units one at a time. The case company is a subsidiary of the corporation and a recipient of the management concept. 'Subsidiary' and 'recipient unit' are thus both terms that are used when referring to the case company in the analysis.

This company has long traditions for applying lean as the basic way of coordinating work, first introduced as a demand by their main customer in the mid-1980s (Interview with team leader, November 2011). For this reason, Lean Enterprise represents the latest version of a known philosophy. The company has got a strong and influential trade union, whose perception of Lean Enterprise and the implementation has been mostly positive (Field notes, November 2011). Some employees have mentioned that things in general have become more structured in the years after the acquisition (Field notes, October 2012).

However, many employees have found this change effort difficult and the implementation has been not entirely successful. The results from studies in the autumn of 2012 showed that about 40 % of the respondents state that they do not use Lean Enterprise at all, while an additional 49 % answered that they use only elements of the system (Status report, March 2013). The respondents were people in different units and at various hierarchical levels at the plant, hence constituting as what is considered representative group of employees. The data further implies that Lean Enterprise tends to diverge between the organizational borders of the units within the case company. Even though Lean Enterprise is meant to concern all employees of the corporation, several do not consider the management concept fit for their work:

It is mostly for the production employees, not so much for us. Here things are the same as they used to be (Interview with maintenance worker, October 2012).

We propose suggestions on processes, but other people are using the actual system (Interview with operator, October 2012).

Other employees, however, had heard about the concept, but admitted that they did not really know what it means in practice:

I have heard of Lean Enterprise, but I do not know what it is (Interview with toolmaker, October 2012).

Furthermore, some had gained a misinterpreted perception of the concept, missing the idea that the concept is supposed to involve and improve the whole organization, both in terms of hierarchical levels and units:

Lean Enterprise is much focused on production, and not administrative and support processes (Interview with unit leader, November 2011).

Lean Enterprise is for the managers (...). I don't think it is very useful (Interview with operator, October 2012).

All these factors indicate that the MNC has experienced difficulties in the implementation of the management concept, thus, the change initiatives cannot yet be considered successful.

The access to data gathered over a period of several years has provided the valuable insight necessary to examine the implementation of a management concept as it is perceived by the case company. Having worked at the shop floor at a unit during a period of three weeks, we have gained detailed knowledge of the day-to-day activity. We were also fortunate enough to witness the first days of the implementation of Lean Enterprise at this unit, as well as being provided with field notes that dates a couple of months after the first introduction. This has enabled us to closely study a community of practice facing a management concept. For this reason we propose that our study can add to an alternative understanding of the matter.

1.3 Research question

We thus want to explore the organizational dynamics that emerge when a work organization, which is highly dependent on communities of practice, is confronted with rationalization through the implementation of a management concept that is based on the principles of Lean Production. This is done by studying the transfer of the management concept from the foreign headquarters to the subsidiary company in Norway. Based on the arguments in the theoretical background (cf. 1.1) and our empirical foundation, we will also take the analysis one step further, by closely examining a community of practice and assessing the implementation with respect to this community in particular. This is interesting due to upcoming research that argues that within capital intensive sectors, long term tendencies of rationalization may undermine community of practice reproduction and its associated learning mechanism (Ingvaldsen, forthcoming). In other words, communities of practice and the implementation of a management concept may be incompatible. This has led to the following research question:

What are the possible explanations for the difficulties in implementation of a management concept from a headquarters to a community of practice within the recipient unit of a multinational corporation?

This is a comprehensive and complex research question with a wide range of influencing variables, and it therefore requires a structured and stepwise approach. Firstly, the particular management concept must be analysed with regard to its characteristics, as its nature is expected to affect the implementation outcome. Secondly, as the aim is to examine the act of implementation, the implementation approach and choice of change strategy is relevant. Thirdly, one should address the necessary considerations related to the implementation happening cross-border from the headquarters in a Central European country to the recipient unit in Norway. In order to expand the analysis with respect to a given community of practice within the company, one must start by identifying a set of social configurations that can be considered communities of practice. By comparing these, the most distinct community of practice can be selected and more profoundly described, forming the basis for the further analysis. Due to limitations regarding the length of the report, just one community of practice is selected in this study. An assessment of the implementation of the management concept must then be made

with reference to the characteristics of the selected community of practice, hence examining the tensions when the community of practice are facing the management concept. Finally, the different analysis can form an aggregate evaluation of the difficulties experienced in the implementation efforts. Consequently, the following set of subordinate research questions has been developed:

1. What characterizes the management concept and how does this affect the implementation?
2. How does the choice of change strategy affect the outcome of the implementation?
3. What considerations must be made given that it is an implementation cross-border from a headquarters to a recipient unit within an MNC?
4. How could social configurations be identified as communities of practice, and how could they be compared?
5. How could the selected community of practice be described?
6. What happens when the community of practice faces the management concept?

To address and provide answers to these questions, a theoretical foundation is needed. The next chapter provides a literature review which, in turn, founds the basis for the refined research questions introduced in chapter 3. This is followed by short description of the structure of the remaining chapters with regard to the developed subordinate research questions. Later, the methodological approach is presented in chapter 4. The actual case study and analyses are found in chapter 5 to 10, followed by the final conclusions of the study in chapter 11.

Chapter 2:

LITERATURE REVIEW

As the research question is a fairly comprehensive and complex one, the need for a thematically structured review is considerable. This chapter thus provides an overview of the current research on the different topics studied in this thesis. The overall theme of this thesis is strategic change management, and the aim is to develop in-depth knowledge of core issues with regard to organizational changes. For this reason, section 2.1 presents the evolution of theory on organizational change in general, addressing the reasons for why organizations change. As current literature propose a range of ways to approach change initiatives, this section further include the most well-known contributions to literature on change strategies and approaches to change. During the last decades the case company has gone through a number of different change efforts, both in terms of changes in ownership and in introduction to new production systems and concepts (cf. 1.2). An examination of possible consequences of repeated change efforts is therefore included at the end of section 2.1.

The organizational change in this case concerns the implementation of a management concept. It is therefore interesting to understand how and why these concepts become fashions, and the degree to which the concept in this case, Lean Enterprise, is such a management fad. Theory on management concepts and lean in particular, is thus provided in section 2.2. However, understanding the nature of the concept is one important aspect; understanding the method of implementation is another. Implementation of management concepts is therefore addressed in section 2.3, as well as theory on the implementation of lean in particular.

As the objective of the study is to examine a management transfer from a headquarters to a subsidiary, a more throughout analysis of the content of transfer is important. In this case this implies a categorization of Lean Enterprise. For this reason, section 2.4 provides literature on how to categorize the subject of transfer in general, before using the method as a means to describe lean in detail. Due to the fact that the change initiative in this case involves a transfer cross-border within a multinational corporation, one should expect differences in contexts to

influence the implementation. Important contextual perspectives are therefore addressed in section 2.5. Since the subsidiary is a Norwegian company, literature on contextual characteristics of Norwegian employment is also presented in order to fully understand the environment in which the case company operates.

The research question further specifies that the implementation is to be examined on the basis of a community of practice within the subsidiary. One must therefore clarify the notion of 'communities of practice', as well as how to identify and describe such social configurations. In addition to a review of current research on the topic, section 2.6 also includes our theoretical contributions in terms of frameworks for identifying and comparing communities of practice on the basis of the existing literature. This is followed by section 2.7, which combines the theories of the content of management transfer and the elements of communities of practice in a third framework, serving as a tool for analysing the occurring dynamics as a community of practice is faced with a management concept. Finally, section 2.8 provides some short concluding comments to the literature review.

2.1 Organizational change

Today's business environments have in recent years witnessed a high pace of organizational change (Doyle, Claydon, & Buchanan, 2000). One approach when interpreting organizational change is to perceive it as an "empirical observation of difference in form, quality, or state over time in an organizational entity" (Van de Ven & Poole, 1995, p. 512). In general there is a common perception that organizations tend to find change difficult (Burnes, 2005). Changing organizations seem to be even more important now than in the past, due to increased fluctuations in the business environments. This has led to a lot of discussion on the most appropriate ways to manage change (Burnes, 2005), making the selection of change strategy a key issue.

2.1.1 Different perspectives of change

Tsoukas and Chia (2002) state that how people perceive change depends on their view on organizations, that is, whether it consists of things or processes. The first and best-known approach is founded in the classical organization theory, where organizations are perceived as stable structures. This traditional perspective derives back to the work of Taylor (1911) and Weber (1978), among others. Both of their theories, the scientific management and bureaucracy theory respectively, are characterized by a rational decision-making process with a clear hierarchical division of powers and a distinction between planning, decision-making and practice (Klev & Levin, 2012). Weber (1978) argues that the bureaucratic organizational structure dominates in business environment as it is the most efficient. Another important theoretical contribution that presents change as a linear, planned process was developed by Lewin (1947). In his general framework for understanding organizational change, he presents it as a planned three-step process of unfreezing, changing, and then refreezing. In order to achieve change from such perspective, Cummings and Worley (2009) argue that it is necessary either to increase the forces that push for change or to decrease the forces which are trying to maintain the current state.

Even though the environments in which organizations operate are rapidly changing, DiMaggio and Powell (1983) state that there is a high degree of organizational homogeneity worldwide, and that the interesting question revolves around of why this is. As opposed to the thoughts of

Weber (1978), they maintain that this existing homogeneity is due to external, institutional pressures. Following the institutional theory approach, DiMaggio and Powell (1983) argue that “organizational change occurs as the result of processes that make organizations more similar without necessarily making them more efficient” (p. 147). They further describe mechanisms; coercive, mimetic and normative, through which isomorphic change occurs, related to the issue of legitimacy and political influence, responses to uncertainty and the professionalization of managers (DiMaggio & Powell, 1983).

In contrast with the theories of DiMaggio and Powell (1983), Pettigrew (1985) perceives change as complex, situation-dependent and continuous processes, where an understanding of the interconnectedness of all factors involved is needed in order to succeed with the change efforts. He further suggests that research on organizational change must especially take into consideration the interplay between the context of change, the process of change and the content of change (Pettigrew, 1985).

Taylor (1911) and Weber’s (1978) perceptions of organizations as stable structures contrast with more recent literature, that rather tend to perceive organizations as processes. Already in the late 1970s, Argyris and Schön (1978) introduced the perspective of organizational learning. The essence is that each person has a potential which could be beneficial not only for the individual itself, but also the employing organization, which means that organizations should be more open to change and be able to participate in new learning. Consequently, change in organizations was understood as learning processes (Argyris & Schön, 1978; Argyris & Schön, 1996). In the 1990s, a debate arose on how the organizations should be developed in order to have the inherent capacity of learning (Klev & Levin, 2012). Senge (1990) describes how the organizational members should cultivate disciplines for creating a learning organization. In this way, the objective is to make the organization able to learn continuously in order to achieve successful long-term change (Senge, 1990). Consequently, the conceptualization of learning organizations was related to the perception that organizations are changing continuously and that organizational change is rather a product of its members (Klev & Levin, 2012).

To add to the understanding of organizational development and change, Van de Ven and Poole (1995) have introduced four basic theories for explaining the change processes - life cycle, teleology, dialectics, and evolution, each of them illustrating that change processes are driven

by different conceptual motors. Thus, the complex change processes are driven by an interplay among several of these mechanisms (Van de Ven & Poole, 1995). Organizations are truly diverse, and much literature describe them as characterized by complex and ambiguous, or even rational, natural or open systems (Bolman & Deal, 1984; Scott, 1981). Vidal (2007) argues that it is the different interests in the organization that form the basis of the organizational change. Jacobsen (2012) further claims that all changes eventually happen in different ways, hence making it difficult to find universally common features. As a consequence, there are several different change strategies and theories for describing these. Literature do, however, tend to refer to research by Beer and Nohria (2000b) who distinguish between two main perspectives of change. These are described in the next subsection.

2.1.2 Change strategies

Based on existing literature and business practices, Beer and Nohria (2000b) argue that there are mainly two different approaches to organizational change; economic value-driven and organizational capability-driven change. These are referred to by them as ‘theory E’ and ‘theory O’ respectively (Beer & Nohria, 2000b). This framework represents one of the best-known strategy categorizations, and is by other researchers referred to as strategy E and O (e.g. Jacobsen, 2012). Within strategy E, the goal is to maximize economic value, focusing on formal structures and systems. Change is seen as planned and programmatic, and accomplished through top-down implementation (Beer & Nohria, 2000b). The objective of this strategy is further related to the results that can be measured from a given change effort (Jacobsen, 2012). The purpose of strategy O, on the other hand, is not result-oriented, but rather related to developing organizational capabilities by focusing on creating a high commitment culture through participative leadership. In this perspective, change is perceived as emergent and less programmatic (Beer & Nohria, 2000b). Table 1 illustrates the main differences between these two approaches to change, derived from Jacobsen (2012):

	Strategy E	Strategy O
Purpose	Clear results	Learning ability
Leadership	Top-down	Bottom-up
Content	Strategies, structures and	Individuals, groups and cultures
Planning	Formal and sequential	Incremental and experimental
Motivation	Use of financial incentives	Participation and intrinsic motivation
Consultants	External specialists	Process specialists

Table 1: Change strategies (Jacobsen, 2012)

Consequently, one of the main differences between strategy E and O, is that the latter perceive change as a continuous development process with incremental and experimental planning, while the change process as seen from the strategy E perspective is linear, formal and sequential.

In reality, however, change strategies often fuse together, making the clear theoretical distinction between strategy E and O primarily an analytical approach (Jacobsen, 2012). Based on the framework presented by Beer and Nohria (2000b), Huy (2001) argues that large-scale planned change implies an alteration of several organizational elements, requiring different approaches to change. He has conducted a conceptual framework of the following four generic change strategies; engineering to change the work processes, commanding to change the formal structures, teaching to change the belief systems, and socializing to change the social relationships. The content of change is described as tangible within the engineering and commander intervention, which represents theory E. Similarly, the two latter strategies are characterized by an intangible content, thus constituting theory O (Huy, 2001).

Other differentiating characteristics regard the strategies' view on the role of management: Kotter (1990) argues that change is the primary function of leadership; leadership thus produces change. In order to understand the different approaches to change in line with the second subsequent research question, one must therefore address the role of the management. As

shown in table 1, strategy E involves a top-down approach to leadership while strategy O takes on a bottom-up perspective. The two approaches, which can be expected to affect the change process in different ways, are described in the following subsection.

2.1.3 Approaches to change: Top-down and bottom-up leadership

As mentioned, the top-down leadership is a characteristic of the strategy E perspective. In such cases, and following the traditional organizational theory, change and organizations could be considered contradictory, as organizations are seen as predictable, and changes are actions that disturb the stability (Jacobsen & Thorsvik, 2002). This implies that bureaucratic organizations as described by Weber (1978) will not easily adjust to change, as rigid organizations tend to resist as much as possible. Consequently, when perceiving organizations as stable, the decisions must be made where the power lies, implying that a top-down approach to change is necessary (Crozier, 1969). Thus, the change becomes a consequence of rational analyses (Klev & Levin, 2012), where it is considered as a process in which organizations have to adapt, and the focus is centred around the development of the strategy rather the forthcoming implementation phase (Jacobsen & Thorsvik, 2002). Klev and Levin (2012) describe this approach as a mechanic understanding of organizations, where the managers act as masterminds whose main task is to keep the “machine”, hereunder the people and the technology, running smoothly. In other words, by taking this perspective the change is regarded as planned actions derived from the top management’s choices (Jacobsen, 2012).

A top-down approach is characterized by clear objectives and thorough plans, making it ideal for decisive organizational changes (Kerber & Buono, 2010). One of the main reasons is that the plan works as a “roadmap that outlines a project management approach to the change process” (Kerber & Buono, 2010, p. 12). Such executive-led change efforts is said to have a wide range of advantages (Jacobsen & Thorsvik, 2002), and it seems reasonable to believe that this has contributed to its popularity throughout the years. Conger (2000) states that top management has a favourable “breadth of perspective”, which is useful when coping with the organizational environments. Based on the perspective of Mintzberg (1973) on organization’s having both an internal and external environment, the broad access to information is of importance both externally and internally: Primarily, top management hold the overall picture of the organization. It provides them with an understanding of the mutual dependency of the units, and offers

valuable insight to the need for change (Conger, 2000). Secondly, top managers function as a link between their organization and the business environment, providing the organization with an overview of the threats and possibilities in the competitive market, as presented by Porter (1980). The formal positioning power gained by a top-down strategy is useful to be able to force changes (Nadler, 1993), and it also helps in gaining access to resources, which is important as change efforts tend to be highly expensive (Conger, 2000). Furthermore, top managers are often seen as figureheads for the organization (Mintzberg, 1973), providing a symbolic effect to the positioning power (Pfeffer, 1992), which, in turn, could facilitate the change effort as they function as change agents in the top-down implementation (Jacobsen, 2012). The use of force and the management's autocratic decision-making approach are seen as effective where the authority is respected by the stakeholders (Heller, Wilpert, & Docherty, 1981), or when the top management has sufficient power to control the strategy implementation (Dunphy & Stace, 1988).

Despite the number of advantages, the most obvious challenge with a traditional top-down change is the actual implementation of the pre-set plan. Although mistaken, a common assumption is that good analysis and right decisions lead to an easy implementation process (Klev & Levin, 2012). As Bourgeois and Brodwin (1984) point out, it is impossible to analyse the whole range of potential outcomes before the strategy implementation, and even so, few managers have the concentrated power needed to force the wanted strategy. Similarly, Crozier (1969) states that there are always parts of the organization where the managers do not control the power, making the assumption of rationality and concentrated power a possible pitfall in practice (Jacobsen & Thorsvik, 2002).

Even though a strategy is seemingly unambiguous, the interpretation of it can differ substantially among the various members of the organization (Jacobsen & Thorsvik, 2002). As a possible consequence, the top-down approach could create a lot of internal resistance (Abrahamson, 2000), resistance that is not necessarily due to the content of the change alone, but also to the method of implementation (Jacobsen & Thorsvik, 2002). Another important factor is the limited amount of time to conduct the planning phase, which could result in reactive, rather than proactive, change strategy development (Mintzberg, 1978). When planning, the concept must encompass the whole organization, which again leaves no room for comprehensive adjustments (Crozier, 1969). This might lead to the idea of the concept not being likely to fit the

organization's real problems. Top managers also need to rely on the employees to actually carry on the actions as intended (Jacobsen & Thorsvik, 2002). Despite such well-known shortcomings related to the top-down approach, there is a lot of examples from the business life illustrating the commonality of applying of this change strategy (Dunphy & Stace, 1988).

In the top-down management approach problems are thus likely to arise in the phases of implementation, and not necessarily just as a response to the content of the change itself (Jacobsen, 2012). Besides, as it takes time to plan and implement new solutions, such change efforts could be out of date when actually implemented (Amundsen & Kongsvik, 2008). This is because both the organization and the environment might have gone through further changes, which again would require new solutions. The objective of the bottom-up and participative approach of Strategy O is to make organizations able to develop continuous improvements in order to constantly adjust to changes in the fluctuating environment (Jacobsen, 2012). Strategy O could thus be perceived to compensate for some of the downsides of strategy E.

The bottom-up perspective of leadership could also be seen as a criticism of the strategy E's focus on the economic results, as the strategy O approach in addition to this focuses on improving the working conditions and the social relations at the workplace (Jacobsen, 2012). By encouraging involvement and co-determination in decision-making, the legitimacy of the decisions are more likely to increase, which again would prevent reluctance to change and also enhance the ownership of the new solutions (Jacobsen, 2012). As change in organizations is understood as learning processes (cf. 2.1.1), the basic idea with the bottom-up approach is that all individuals of an organizations need the ability and willingness to learn, and share the knowledge in order to create a learning organization (Jacobsen, 2012); hence making the whole group as a collective to learn.

Kolb (1984) defines learning as "the process whereby knowledge is created through the transformation of experience" (p. 38). In other words, knowledge is a continuously created and recreated transformation process, and thus not an unambiguous entity that can be easily transmitted. Similarly, French and Bell (1999) also describe change as a cyclic process, that is, an iterative and continuous, rather than a linear, process. In most cases there is an uncertainty in how the organization's problems are best solved. An advantage of this perspective is

therefore that it opens for experimentation, enabling the systems to learn from the previous experiences (Shapiro & Kirkman, 1999).

When it comes to the management's role in bottom-up change, leading change implies the ability to involve people, challenge the theories of actions, and facilitate the learning processes in the organization (Klev & Levin, 2012). In the long run, the objective is to gradually reduce the influence of the management, as the driving force of the change process is supposed to be the actual problem owners, that is, the employees (Jacobsen, 2012). This is in line with the perception of Bennis (2000) on leadership in change processes, as "no change can occur without having willing and committed followers" (p. 117). This means that instead of being the ones developing the changes, the top management should facilitate and encourage the employees to develop the solutions themselves, by putting the individual's ability to learn and experiment in focus. The reason is that it often is the employees at operative level that have the best insight in the organization's problems, and in how they should go about solving them; hence they are often the first to see the need for change. Since employees represent different viewpoints of the organization, actively involving them would also provide a wider range of suggestions, which in terms helps clarifying the actual organizational problems and possible solutions (Gustavsen, 1990; Jacobsen, 2012). In spite of such advantages of using a bottom-up approach to change, most change efforts in today's organizations, however, take place through top-down strategies (Dunphy & Stace, 1988).

When developing and deciding upon a change strategy, it is important not to act without taking into consideration previous experiences with changes in the organization. The next subsection therefore provides an examination of possible consequences of repeated change efforts.

2.1.4 Repeated change efforts: Change fatigue and the BOHICA effect

Throughout the last decades, the case company in this study has gone through several changes in ownership, and has as a consequence also been faced with a wide range of concepts and systems. Due to the recent acquisition, the case company has been enforced to adapt to yet another management concept (cf.1.2). Previous experiences with change efforts are assumed to have a great influence of the success of the current implementation of Lean Enterprise.

Change fatigue and occurrence of the BOHICA effect are possible consequences of such repeated change efforts; concepts further given account for in this subsection.

In recent years, the pace of organizational change is experienced as high and the frequency appears to be growing exponentially (Doyle et al., 2000). Using the argument of “practice makes perfect”, one could expect this ever growing rate of change initiatives to leave employees well equipped to deal with change. Proof, however, suggest otherwise. Research by Doyle et al. (2000) has shown that change in many cases is accompanied by stress and management–employee distrust. Even more importantly, it is found that lots of people are basically just tired of constant change (Doyle et al., 2000).

The number of changes an organization undergoes appears to be the origin of ‘change fatigue’. This phenomenon is established through recent and extensive studies by Elving, Hansma, and de Boer (2011). The term ‘change fatigue’ can be defined as “the individual’s response of becoming disoriented or dysfunctional as a result of too much stimulation” (Stensaker, Meyer, Falkenberg, & Haueng, 2002, p. 298), and it is has later been explained as “a state that can be described as resigned attitude towards change. Not willing or feeling able to put an effort into the change” (Elving et al., 2011, p. 1632). What is an important aspect of both definitions is that the term describes an individual state. The studies by Elving and his co-researchers (2011) resulted in the following hypothesis being supported: (1) Evaluation regarding the former change projects in general will be negatively related to the experienced change fatigue, such that higher-level employees will experience lower change fatigue and lower-level employees will experience higher change fatigue. (2) Function will be negatively related to the experienced change fatigue. (3) Age will be positively related to the experienced change fatigue. (4) The number of changes undergone is positively related to the experienced change fatigue. (5) Change fatigue is negatively related to (a) support for and (b) intended contribution to the change. (6) Perceived quality on information on the change will have a negative influence on change fatigue. In consistence with their findings of change fatigue being one of the influences for change (Elving et al., 2011), Abrahamson (2000) suggests that change fatigue would result in resistance to change.

Closely related to the idea of change fatigue is the slightly more examined concept of BOHICA - ‘Bend Over, Here It Comes Again’. Dunsing and Matejka (1994) define the BOHICA as “a

grinding down of the will to change and the overt and covert sabotage of the new, better ways of doing things” (p. 40). A common interpretation of the term among change-weary employees is “a critical assessment of the procedural and substantive issues associated with organizational change” (Connell & Waring, 2002, p. 349). This is a perception of BOHICA as a syndrome; describing employee cynicism degenerated by uncertainty, doubt, scepticism and distrust. It is found to arise as a response to repeated violations of the psychological contract arising from successive change initiatives. Findings of studies conducted by Connell and Waring (2002) suggest that employees, as a result of failing to perceive a rationale for change, learn to expect further changes to eventually be discarded in favour of future changes. This phenomenon may cause employee preparedness to consider new change proposals to be significantly reduced. By consciously keeping their heads down, chances are that the intended change would miss the employees completely, making them not having to deal with it (Connell & Waring, 2002). Another perspective is presented by Stensaker et al. (2002), describing BOHICA as a frequently reported coping mechanism in response to employee perception of excessive change. As a common consequence of this resigned state, employees tend to concentrate on their everyday tasks, making them passive to change (Stensaker et al., 2002).

Given the corporate mantra “to change or perish” (Abrahamson, 2000), and the understanding that employee reactions to change are pivotal to its long-term success, management must put an effort into understanding employee reactions to change , thereby decreasing the probability of change fatigue and the BOHICA effect. In this regard, one must consider what the intended change actually is. In our particular case, this corresponds to the implementation of a given management concept. The following part therefore provides a review on current research on management concepts and fads.

2.2 Management concepts and fads

The actual change effort that the case company is currently experiencing is the implementation of a management concept. In order to examine the implementation, one must therefore first try to grasp the notion of 'management concepts'. Literature on the topic often applies the term 'management fashions', or 'fads'. The following subsections provide a description of the nature of management fads in general, before introducing the term 'lean' and explaining how it may well be designated as a management fad.

2.2.1 What is a management fad?

Manuals and techniques of management and organizations have existed since the 19th century (Huczynski, 1993), and one of the first books providing a recipe for successful management was Taylor's (1911) work of scientific management from more than a hundred years ago. Since then, an ever-increasing number of management concepts and models have been introduced, with a dramatic rise since the late 1970s (Huczynski, 1993; Pascale, 1990).

The phenomenon of "management fads" describes concepts that are fashionable and draws managers to them by promising success (Birnbaum, 2000). There are, however, many words describing the same phenomenon. Other well-known labels are management fashions (Abrahamson, 1991), business fads (Pascale, 1990), management ideas (Huczynski, 1993), and management theory (Micklethwait & Wooldridge, 1996). According to Abrahamson (1996), existing theory tend to conceptualize management fads by treating the techniques as aesthetic forms, and the demand of management fashion as generated from social and psychological forces (Abrahamson, 1991; Mintzberg, 1979). Abrahamson (1996) presents an alternative approach, where the demand is shaped by a competition between both socio psychological and techno economic forces, as he argues that also intra organizational contradictions have an impact on the demand.

Management fads can be seen as results of new understandings of both the challenges and opportunities of business environments (Klev & Levin, 2012). Kieser (1997) conceptualizes management concepts as the natural outcome of the modern capitalist economy, stating that that management fads have the ability of triggering changes as they contain ideas that actors in organizations find useful. It has also been argued that management fashions "shape the

management techniques that thousands of managers look to in order to cope with extremely important and complex managerial problems and challenges” (Abrahamson, 1996, p. 279). Moreover, management fads could also function as “safety harnesses” in the ever-more competitive business environment (Bradley, Erickson, Stephenson, & Williams, 2000). As this environment becomes more and more competitive and complex, the life spans for today’s management fashions tend to be significantly lower than the ones of previous decades (Carson et al., 2000). Lean Production, Business Process Re-engineering, Total Quality Management and Total Productive Maintenance, are all examples of fashionable management concepts extensively presented in business literature, consequently exposing managers to contradictory and changing advices (Noon, Jenkins, & Lucio, 2000; Rolfsen & Knutstad, 2007).

According to Pascale (1990), the evaluation of whether or not a concept is a trend depends on how perceiving, long sighted and persistent the enterprise makes an effort to implement the trend. Similarly, Huczynski (1993) claims that a concept has to fulfil certain aspects in order to be characterized as a trend: It needs be up-to-date and correspond to today’s challenges, and the message must reach out to the potential followers. The concept theory must propose changes that meet the individual needs of the management, and the essential ingredients need to be made out in such a way that the followers find it relevant. Finally, the theory must be presented in an enthusiastic way (Huczynski, 1993). Abrahamson (1996) argues that a management technique can be labelled a fashion “only when it is a product of a management-fashion-setting process involving particular management fashion-setters” (p. 256). The latter is described as either organizations or individuals that are supposed to dedicate themselves to producing and spreading the management knowledge. Together they constitute the management fashion-setting community, which is supplying the mass audiences with ideas and techniques, making the followers of the management-fashion consumers. Important actors are management consultants, business schools, and academic and consultant gurus (Abrahamson, 1996). As the popularity of the management ideas fluctuates, so does the legitimacy of this particular management fashion-setting community (Clark, 2004). Consequently, the popularity of the ideas depends on the ability to always meet the consumers’ needs. This implies that the fashion setters must sense the preferences of managers for new ideas, in addition to developing rhetoric to describe the ideas, and finally spreading these ideas to the managers before others do (Abrahamson, 1996). Moreover, when a management concept becomes popular, it will

generate preferences for new fashions, making each succeeding fashion build on the previous ones (Abrahamson, 1996; Clark, 2004).

According to Benders and van Veen (2001), management fads are best conceptualized as “the production and consumption of temporarily intensive management discourse, and the organizational changes induced by and associated with this discourse” (p. 33). They define the ambiguity as “interpretative viability”, which could possibly strengthen during the management fads’ life cycle. Furthermore, management ideas are characterized as malleable due to broad principles, making them ambiguous and vague (Clark & Salaman, 1998; Kieser, 1997). Huczynski (1993) argues that this vagueness is a success criterion in the implementation, because different actors worldwide has the ability to become able to customize the concepts with regard to different contexts, and more precisely to their own values. Similarly, Clark (2004) describe this phenomenon as management fads viewed as a “universal panacea”, as the ideas could be transferred across different domains.

In general, existing literature on management concepts tends to focus on the rhetorical strategies of management fashion suppliers, missing the importance of the potentially active role of both those involved in shaping and implementing the management ideas (Clark, 2004; Newell, Robertson, & Swan, 2001). In other words, focus has been on the “supplier” side of the relation. While the recipient unit is described as a slavish follower, the literature presents management “gurus” and consultants offering ideas with persuasive rhetoric communication, for instance through best-selling books (Abrahamson, 1996; Clark, 2004; Clark & Salaman, 1998; Huczynski, 1993; Rolfsen, 2000). When it comes to managers, they tend to be presented as victims of the clever “witch doctors” (Micklethwait & Wooldridge, 1996).

In the efforts to offer an alternative understanding of implementation of a management concept, our case study is developed based on the recipient party, rather than the supplying party, that is, the headquarters. Having introduced the range of criteria for a concept to be known as a management fad, lean is now described in the next subsection, as the corporation of this case study is using an adapted version of this concept. The subsection also present arguments as for why lean can be considered a management fad.

2.2.2 Lean

The case company has been enforced to implement the company-specific system Lean Enterprise after a change in ownership in 2010, a concept which is derived from Lean Production. The concept of lean was originally developed within Toyota in Japan in the 1940s, as the Japanese automotive manufacturers needed to pursue radical changes due to decrease in sales (Rolfsen, 2000). Later, Krafcik (1988) labelled the concept Lean Production, and in 1990 this term became immensely well-known after the publication of “The Machine that Changed the World” by Womack, Jones, and Roos (1990). Benchmarking Japanese against Western automotive industry, Womack et al. (1990) concluded that the Japanese organizational system was considerably superior, and based on these findings the concept was introduced as the future global standard for high volume production. The effects of the book were tremendous, and Lean Production became a megatrend in the USA as well as in the global automotive industry (Levin, Nilssen, Ravn, & Øyum, 2012). The concept of Lean Production was later rewritten in more general terms, such as “Lean Thinking” (Womack & Jones, 1996) and “Lean Consumption” (Womack & Jones, 2005). Abrahamson (1996) proposes that, when a management technique becomes popular in a collectivity, it will diffuse rapidly across organizations within this particular collectivity. This is more than evident in the case of Lean Production within the automobile industry (Benders & van Bijsterveld, 2000; Benders & van Veen, 2001). Not only has lean become one of the best-known concepts within this industry, but it has later also affected other businesses. For instance, Bowen and Youngdahl (1998) argue that services can apply revised, progressive manufacturing technologies, calling this a “production-line approach to service”.

No consensus is reached on a definition of ‘lean’, and authors seem to have different opinions about which characteristics best describe the concept (Pettersen, 2009). In 1996, Womack and Jones published their second book on the theme, this time with the encouraging title “Lean Thinking - Banish waste and create wealth in your corporation”. They describe ‘muda’, the Japanese word for waste, as activities that absorb resources but create no value, and they define ‘lean thinking’ as the antidote to such waste. The book provides a set of principles that are to guide organizations in eliminating waste, hence becoming lean; accurately specifying ‘value’, identifying the entire value stream, making the value-creating steps for specific products ‘flow’ continuously, letting demand ‘pull’ the value from the enterprise, and striving for

'perfection' (Womack & Jones, 1996). Most literature has followed this description of lean mainly as waste reduction, often speaking in terms of "elimination of muda" (Morgan & Liker, 2006). According to Hopp and Spearman (2004) this is too simplified a view, often creating misunderstandings. In their opinion, lean represents a more fundamental framework for enhancing efficiency. For this reason, the two have offered a definition, which we have chosen to quote, as it is general yet precise:

Definition (Lean): "Production of goods or services is lean if it is accomplished with minimal buffering costs" (Hopp & Spearman, 2004, p. 144).

The first source of excess buffering is obvious waste. Such waste includes, among others, unneeded operations, rework that can be eliminated and excessive setup times. The second and not so obvious source of buffering costs is variability, both with regard to internal and external factors. Variability can take on many forms, like variability in process times and demand rates. All that is not absolutely regular and predictable exhibits variability. Minimizing costs of variability and obvious waste is thus the key to accomplishing a Lean Production (Hopp & Spearman, 2004). A recent alternative definition is provided by Modig and Åhlström (2012), as they describe lean as a strategy where efficiency in flow is prioritized over efficiency in resources. As an argument for their definition, they further refer to a saying by the founder of Toyota Production, Taiichi Ohno, that also emphasizes the importance of efficient flow: "All we are doing is looking at the time line, from the moment the customer gives us an order to the point when we collect the cash" (Modig & Åhlström, 2012, p. 122).

Since the birth of the concept in the 1940s, the focus on lean in various industries and corners of the world has reached its peak at different points of time. Even so, there is no doubt that the concept is still highly relevant (Benders & van Bijsterveld, 2000). According to Shah and Ward (2007), the ability of lean to provide competitive advantage, and its link with superior performance, is well accepted among today's academics and practitioners. The fact that alternatives to lean have not really found widespread acceptance is even acknowledged by its critics (Dankbaar, 1997). Thus, lean has clearly not just been a passing fashion, and does therefore not fit neatly into Kieser's (1997) argument of today's management fashions as short-lived.

Returning to the above-mentioned criteria (cf. 2.2.1) for a concept to be characterized as a trend or a fad, there is, however, considerable evidence that lean is in fact a management fad. Firstly, it corresponds to current challenges, as efficiency and optimal supply chain flows are essential for competing in the global market. These are challenges experienced by most enterprises, regardless of business specifications. Secondly, the message of lean has been communicated through several different channels, among them best-selling books, papers, magazines, consultant recommendations, and academic forums, hence reaching out to potential followers globally (Womack & Jones, 1996). Further, the theory on lean is often presented in creative and enthusiastic ways, and using simulations as a means for communicating the potential improvements is typically common among consultants (Badurdeen, Marksberry, Hall, & Gregory, 2010). Moreover, consultants are, according to Abrahamson (1996), important actors in the world of management concepts. Last, but not least, the criterion of triggering changes (Kieser, 1997) is fulfilled; in order for a company to be lean it needs to change not only its ways of doing things in practice, but also the business philosophy and culture (Angelis, Conti, Cooper, & Gill, 2011). This shows that lean satisfies most of the criteria for being a fad as presented by Huczynski (1993). In addition, one can turn to the argument of Birnbaum (2000), that the phenomenon of fads can only be used for describing concepts that are fashionable and draw managers to them by promising success. As mentioned above, the link between lean and superior performance is well accepted among both academics and practitioners (Shah & Ward, 2007), and it is even referred to by some as a megatrend (Levin et al., 2012). Additionally, Lean has been explicitly studied and referred to as a 'fashionable' concept by previous researchers (e.g. Benders & van Bijsterveld, 2000).

A widely discussed criticism of lean regards contradictions between standardized concepts and employee participation (Vallas, 2003). One theoretical position is that lean is based on improved process control, and not worker empowerment (Vidal, 2007). Berggren (1993) further argues that the Japanese focus on standards seems "incompatible with the emphasis on autonomy, freedom, and worker discretion heralded in human-centred production" (p. 254). As lean is trust-based, it cannot function if the "workforce feels that no reciprocal obligations are in force" (Womack et al., 1990, p. 103). Findings from Vidal (2007) support the idea that lean improves process control by engaging workers in standardization, although it does not necessarily improve the worker's interest in participation.

Another position is that Lean Production implies an increase in both productivity and quality, as well as making the processes of production more humanized (Womack et al., 1990). The argument is that lean replaces traditional rigid mass production by employee responsibility - meaning the “freedom to control one’s work” (Womack et al., 1990). Womack et al. (1990) further explain how lean contributes to “creative tension” (p. 102), making work both challenging and humanly fulfilling. The main idea is that the workers could contribute to technical aspects on the shop floor, for instance by participating in developing best practices. In other words, lean is said to improve the worker’s control in the daily work life (Adler, 1995; Womack et al., 1990). Consequently, the interest of both the workforce and the management is said to be compatible (Graham, 1995). However, researchers like Hackman and Wageman (1995) argue that only a few workers actually are involved in these kind of participating activities, making the rest of the workforce suffer from “motivationally detrimental standardized work” (Vidal, 2007, p. 206)

It is thus seen that understanding the nature of management fads and of lean in particular, is one important aspect when considering management concepts. Understanding the actual process of implementation of such concepts is another. This is therefore the next topic of this review.

2.3 Implementation

Vidal (2007) proposes that the enthusiasm or resistance of the employees to a substantial degree is affected by how the new system is being implemented. Similarly, Jacobsen (2012) argues that problems are likely to occur as a response to the methods of implementation as well as to the actual content of the change (cf. 2.1.2). In other words, the analysis must not only concern *what* is being implemented, but also *how* the implementation is carried out. The research question addresses difficulties experienced as a management concept is being implemented; hence the actual change takes place during a process of implementation. The first subsection in this section provides an overview of current research on how to go about when actually implementing a management concept, followed by a closer look at important aspects regarding the implementation of lean in particular.

2.3.1 Implementing management concepts

Despite the recent years' growing interest in management fads, there are few examples in the literature showing empirical examples of implementation of such concepts (Carson et al., 2000; Clark, 2004). The tendency is clear; researchers tend to focus on the content of the concepts rather than on how to implement them (Newell et al., 2001), leaving implementation strategies more or less neglected in the literature (Rolfsen & Knutstad, 2007).

Seen from the neo-institutional perspective, management fads tend to fail as they are applied for a short period of time, and then abandoned in favour of some more promising fads (Clark, 2004; Gill & Whittle, 1993). Gill and Whittle (1993) argue that management fads progress through a five-step discrete process of invention, dissemination, acceptance, disenchantment and finally, decline with potential abandonment of the concept. The main idea is that pre-set concepts first lead to initial enthusiasm, followed-up by a phase of disillusionment, before the concept is finally replaced by a new one (Gill & Whittle, 1993). The management fashion-setting consulting firms play a key role in creating the management fads, but also as they are forcing the fashions on to managers worldwide and functioning as change agents in the change processes (Abrahamson, 1996).

The popularity of management concepts has resulted in an increased diffusion of standardized models of organizations (Meyer & Rowan, 2002). Besides, Abrahamson (1996) states that

management fashions tend to make organizations centralize and lose autonomy in certain periods of the implementation cycles. Instead of providing actual empirical analyses of organizational implementation, the research rather focuses on managers' enthusiasm for the ideas (Clark, 2004). In other words, management fashion literature tends to ignore organizational implications of the fads. It further mostly provides descriptions of organizations following a detailed procedure of techniques, which implicitly treats the management concepts as pure technology. The management concept Total Productive Maintenance is a good example of such an approach. An example is the identification by Ahuja and Khamba (2008) of a 12-step implementation procedure, three distinct phases, a five-phase roadmap, a three-phase, nine-step plan, eight fundamental development activities, and finally seven broad elements. Another example is Total Quality Management (TQM), which according to Hackman and Wageman (1995) is characterized by beginning with training of the top-managers in quality philosophy, followed by the development of an organizational vision, and then communicating the vision throughout the organization. This description of the implementation of TQM implies following steps which go gradually down to each level of the organization (Hackman & Wageman, 1995). Such step-wise approaches are problematic due to the underlying assumption that it is possible to copy the concept within different contexts, and there are different views in the literature discussing whether such concepts are universal, or if a contingency approach is required (Sila & Ebrahimpour, 2003). However, Hansson, Backlund, and Lycke (2003) and Lycke (2003) are examples of contributions that have taken certain organizational aspects into consideration.

Another issue discussed in the literature relates to the extent of which the management concepts are actually implemented in organizations worldwide. Clark (2004) criticizes that the life cycles of management fads are mainly identified through citation analyses, and they thus do not provide evidence of the degree of adoption of the concepts by organizations. For instance, although an extensive amount of references exist on the theory on Scientific Management by Taylor (1911), this is not necessarily an implication or proof of the concept being widely implemented in today's organizations (Wright, 1993).

As management concepts are initiated and planned by managers in different companies, implementations tend to follow a top-down strategy, but with different degrees of employee involvement. Business Process Reengineering (BPR) is a management concept well-known for its top-down approach and its scarce focus on employee participation. The leader is seen as the

key initiator of the reengineering process, as he is capable of convincing the employees to accept the radical changes that the BPR will create due to his high degree of influence power (Hammer & Champy, 1994). Davenport (1995) criticizes BPR as “the fad that forgot the people”, due to its technical focus on change and lack of human development consideration. Another top-driven management concept is TQM, the program previously described as following steps that go gradually down from the top-management to each level of the organization (Hackman & Wageman, 1995). A large amount of other management fashions, such as Quality of Work life, Corporate Culture, International Standards Organization (ISO), and Core Competencies, are all characterized by high degree of burden on the top management in the implementation phases (Carson et al., 2000).

Such new trends and fads are emerging at a seemingly constant rate (Klev & Levin, 2012), and Burnes (2003) argues that continuous change appears to be the order of the day. However, before letting another management fad flounder in the organization, Dunsing and Matejka (1994) strongly advise management to make efforts to trying to understand the underlying personnel dynamics. With respect to modern perspectives it is claimed that all organizational change is mediated by employee participation, and that lack of such will entail no actual change (Klev & Levin, 2012). This in line with the strategy O approach (cf. 2.1.2), and also consistent with what Connell and Waring (2002) contend; that employee reactions to change-programs are pivotal to its long-term success.

2.3.2 Implementing Lean

As the management concept being implemented by the case company is an adapted version of lean, implementation of lean is examined in this subsection. As previously mentioned, most literature on implementation of management fads tend to be simplified (Newell et al., 2001), and in this regard lean is no exception: One of the most well-known lean implementation approaches was presented by Womack and Jones (1996) as a set of specific and unambiguous instructions, termed by them an “action plan”. The problem with such a “recipe” is that it seems to neglect the importance of incorporating the holistic philosophy behind the concept. Following Clark’s (2004) criticism on citation analysis (cf. 2.3.1), there is a great amount of “noise” generated with respect to lean; the enormous amount of references to the work of Womack et al. (1990) in the literature does not automatically verify a great extent of successful implementation in organizations.

One of the most recent additions to the literature on lean is provided by Modig and Åhlström (2012) through their book "This is Lean". As the title discloses, this book also approaches the term focusing on the content and the meaning of the concept. It does, however, in addition provide a description of how to go about implementing lean in an organization. In order for the implementation to be successful, one must gain an understanding of the concept, and be able to distinguish between its different levels of abstraction: Firstly, values are what define the organization's behaviour, as they determine the ideal state one should work towards. Secondly, principles define the organization's way of thinking, pointing out the direction to which one should move. Representing the third level of abstraction, methods define the organization's course of action, driving the company and its employees in the right direction. Finally, tools are what the organization needs in order to realize a particular method (Modig & Åhlström, 2012). They further argue that misinterpretations of the concept to some degree are a result of existing literature mixing these levels uncritically. Costello (2011) has discussed several of the same issues, and one of his arguments is that lean cannot be viewed merely as a collection of tools, because tools alone never create change. In order for an organization to be lean it must make a commitment not only to the collection of tools, methods and approaches, but also to cultural change (Costello, 2011). The importance of culture is also emphasized by Liker (2003), arguing that "in the Toyota Way, it's the people who bring the system to life: working, communicating, resolving issues, and growing together" (p. 36). Lean could thus be implemented in many different ways depending on different contexts.

What this section has shown is that determining the best way of implementing management concepts can be immensely challenging for any company. What is more, complexity increases substantially as the change efforts involve transfer across borders, a topic given account for in the next section.

2.4 The content of transfer

Lillrank (1995) argues that the implementations of organizational innovations often fail if they are transferred over cultural, national and industry borders. Various research have emphasized the possibility of changing and adapting certain concepts in order to “fit” new circumstances (e.g. Rolfsen, 2011; Rolfsen & Knutstad, 2007). Lillrank (1995) explains how ideas and practices may suffer from loss due to misunderstandings, incomplete information and essential parts of the original context being left out. In order to reduce such loss, some practices must undergo an abstraction process before being transferred. This is the topic of the next subsections; first in general terms, then with respect to lean in particular.

2.4.1 The content categories of transfer

Lillrank (1995) further emphasizes the importance of elaborating the content of transfer with respect to three categories of management transfer; principles, organizations and tools. These are complementary to each other, meaning that successfully transferring practice in one category is not sufficient without support from the other two.

The first category, labelled management principles, relates to paradigms that specify success factors. The principles can be expressed on various abstraction levels, and they get formulated into strategies when applied to specific organizations and situations. Organizational vehicles, being the second category, are defined as the structures required for carrying these strategies. Transfer of practice in this category typically requires a high level of abstraction, as there is rarely “one best way” when implementing a particular strategy. The last category, generic management techniques and tools, focuses on practical elements such as statistical process control and problem-solving techniques. These are elements typically found in “how-to” handbooks. Since tools are of low context, hence applicable in a wide range of organizational settings, they are typically transferred on a low level of abstraction (Lillrank, 1995).

Accordingly, abstraction goes beyond observable practice. It includes the meanings and interpretation of the practice and it is both culturally and institutionally embedded. As an example, Lillrank (1995) explains how workers in a Japanese enterprise begin their daily work by singing a company song. The symbol of this practice is the building of organizational cohesion through face-to-face interaction, something which is rooted in Buddhist cosmology.

Transferring this pure practice of singing the song to an American or European company would probably be unsuccessful, because the cultural interpretation is missing. In short, tools are often easily transferred, but the results are highly dependent on the connection with organizational vehicles and the overall management principles. What Lillrank (1995) argues, is that complex systems do not transfer well in their original packaging, and for this reason require abstraction. More simply put; a system must be packed and unpacked with regard to the distance it has to travel along an 'idea vein'. The larger the distance, the more is lost due to misunderstandings, incomplete information, and essential parts of the original context being missed (Lillrank, 1995).

2.4.2 Lean and the content categories

As the management concept of the case company is an adapted version of lean, the content categories of transfer are discussed in this subsection with regard to lean in particular. What is the most commonly used definition of 'lean', and thereby what specify success within lean thinking, is first and foremost waste reduction (cf. 2.2.2). 'Zero waste' can therefore be designated an overall management principle of lean. Japanese organizations typically emphasize flexibility, long-term growth, market share and employment security as key objectives, where the relations to suppliers and customers tend to be close and trust-based (Lillrank, 1995). Given that lean is a concept derived from Japanese industry (cf. 2.2.2), these might well be treated as management principles of the concept. Like stated in the definition of lean provided by Hopp and Spearman (2004), minimal buffering costs are the fundamental requirement of being lean, hence minimizing cost of both variability and obvious waste. Due to such focus on reducing the non-value-adding processes, 'quality' could also be characterized as a management principle: Lillrank (1995) even explicitly states that "the key success factor of Lean Production is low cost, high quality manufacturing offering a wide variety of models and functions continuously improved through rapid product development cycles." (p. 973). As different management principles can be expressed on various abstraction levels (cf. 2.4.1), 'quality first' would be one of low abstraction level. As earlier presented (cf. 2.2.2), 'value' is another main principle of lean. Womack and Jones (1996) argue that value is the critical starting point for Lean thinking, and they further stress that it only can be defined by the ultimate customer. 'Customer satisfaction' is thus another example of a management principle that can apply within lean. Modig and Åhlström (2012) describe lean as shifting from resource to customer focus. In other words, meeting the needs of the customers should be prioritized over

achieving efficiency in utilization of resources (cf. 2.2.2). Such aim of customer satisfaction is more context-dependent than for instance the management principle 'quality first', and thus requires a higher level of abstraction. Another term that is central within literature on lean is 'kaizen', which is defined by Womack and Jones (1996) as continuous and incremental improvement of an activity in order to create less waste and thus more value.

With regard to Lillrank's (1995) second category, organizational vehicles, one could return to Womack and Jones' (1996) guide for how to become lean; accurately specifying value, identifying the entire value stream, making the value-creating steps for specific products flow continuously, letting demand pull the value from the enterprise, and striving for perfection. These are five structures that are required for successfully eliminating waste. They thus constitute organizational vehicles of lean. An organization handling short cycle times is an example of a structure needed to be able to achieve the management principle of customer satisfaction. In today's business environment, characterized by high competition level, customers require short lead-time, that is, the time from placing the order until the product has been received. This makes short cycle time crucial to fulfil those needs. Moreover, managing low inventory levels is beneficial in order to meet the demand for customized products, and consequently pursuing customer satisfaction. Hence, handling short cycle times and managing low inventory levels are other organizational vehicles of lean.

A well-known technique within lean is '5S', which is short for sorting, sequencing, shining, standardizing, and sustaining. The technique is used to eliminate the waste that occurs when spending time and motion looking for tools and materials, and it contributes to a clean work area where equipment has its designated place (Womack & Jones, 1996). Another term to be described here is 'SMED', Single-Minute Exchange of Dies, used as a tool for minimizing the set-up time by reducing the production batches, thus avoiding high stock levels (Shingo, 1985). These are both examples of practical elements of Lillrank's (1995) third category; generic management techniques and tools, and they emerge frequently in literature on how to become lean. 'Visual control' can also be categorized as a technique of lean, as it is used as a means to make the status of a system easily understood by everyone through plain view placements. This includes tools and activities, as well as indicators of production system performance (Womack & Jones, 1996). In addition to the techniques and tools presented here, lean includes a wide range of others, such as 'Kanban', 'Poka Yoke', and 'work balancing'. These are however, not

described here, as they are not used later in the analysis. Many organizations begin their lean journey implementing such well-known methods and tools (Modig & Åhlström, 2012). The argument in theory that techniques and tools easily transfer on a low abstraction level, might be an explanation for the extensiveness of certain lean tools worldwide. However, although the tools are implemented within an organization, it does not necessary mean that the organization actually is lean (Lillrank, 1995; Modig & Åhlström, 2012).

Summarized, one can say that zero waste, customer satisfaction, quality first, and continuous improvement are examples of management principles of lean. Handling short cycle times and managing low inventory levels, are organizational vehicles. So are accurately specifying value, identifying the entire value stream, making the value-creating steps for specific products flow continuously, letting demand pull the value from the enterprise, and striving for perfection. As for techniques and tools, some well-known examples are 5S, SMED, and visual control.

Nonetheless, not only is it important to consider the content of transfer when dealing with the issue of transferring practices and concepts across borders of different cultures, industries, or as in this case; nations. Botzem and Dobusch (2012) argue that the ever-increasing attention on standards is especially evident at the transnational level. What happens then, when a concept is transferred not by external consultants or management gurus, but within a multinational corporation? The following section provides a review of theory explaining the importance of different contextual perspectives that must be addressed when going through with such a transnational transfer.

2.5 The contextual embeddedness of transfers within MNCs

Although existing literature discusses cross-national transfer and the importance “country of origin”, the issue of transfers within MNCs is less examined than transfers of management concept in general. One theoretical position is that MNCs are not becoming “stateless players” even with increased globalization, as even the most globalized enterprises remain deeply rooted in the business systems of their country of origin (Almond, 2011; Ferner, 1997). Another position is that practices are becoming more standardized, referred to by Ritzer (1996) as ‘McDonaldization’. Others claim that MNCs are adapting to the industrial climate of the subsidiary (e.g. Milkman, 1991), but that the degree of transfer tend to vary due to the type of practice. Human resource or industrial relations practices are transferred to less extent than purely technical concepts as wage determination, work hours and contracts are more connected to local institutional arguments throughout the world (Ferner, 1997)

The process of cross-border transfer is described in the literature through various technical models. In the neo-institutional perspective the focal point is the rival isomorphic pressure from the MNC and the local recipient (Ferner, Edwards, & Tempel, 2012). Kostova (1999) explains how only organizational practices that are “infused with meaning” can function as fundamentals for organizational identification, and that these also serve as a basis of personal satisfaction (Selznick, 1957). Practices are difficult to imitate and they vary between organizations, and in order for a practice to be “infused with meaning” it must be approved by employees, and thus have become a part of their organizational identity. For this reason the success of transfer can be conceptualized as institutionalization of the practice at the recipient unit (Kostova, 1999). This contextual embeddedness of transfer is further examined in the following subsections.

2.5.1 Different contexts

An important statement by Kostova (1999) is that previous research has had a tendency to focus merely on differences in national culture, resulting in other important factors being left out. Her model, therefore, provides a broader framework explaining the degree of success of transnational transfer with respect to country, organization and individual levels. These can be examined through the social, organizational and relational contexts respectively. One argument, in particular, is that that the ‘institutional distance’ plays a key role within the social context;

countries differ in their institutional characteristics, organizational practices reflect the institutional environment of the country, and therefore, when practices are transferred across borders, they may not “fit” (Kostova, 1999).

She defines the institutional distance as the “difference between the institutional profiles of the two countries - the home country of the practice and the country of the recipient organizational unit” (Kostova, 1999, p. 316). The greater the distance, the more difficult it will be to transfer the management practice successfully. Conceptualizing the distance, she uses the country institutional profile, derived from Scott (1995), distinguishing between regulatory, cognitive and normative aspects. Regulatory components reflect the existing laws and rules in a national environment that promote certain types of behaviour and restrict other. The cognitive element reflects the cognitive categories that are shared by people in a particular country, and which constitute the frames where meaning is made (Scott, 1995). The third category, normative component, is the values and norms held by the individuals in a given social context.

Transfers are also organizationally embedded; meaning that the corporate context that they occur in can be either favourable or unfavourable regarding the specific transfer. The success of transfer is further positively associated with the degree to which the organizational culture of the recipient unit is supportive of learning, change, and innovation in general terms (Kostova, 1999).

Kostova (1999) further argues that transfer failures may occur even when both the social and the organizational contexts are favourable, because potential reasons for such failures could reside in the relationship between the parties involved, namely the relational context. One must therefore consider the attitudinal relationship, describing the transfer coalition’s commitment to, identity with, and trust in the parent company. The transfer coalition is described as the stable core of managers and the practice experts, and serves as a “bridge” between the recipient unit and the parent company. Further, the recipient unit may also develop perceptions of dependence on the parent unit. Both the attitudinal and the dependency relationship influence the potential success of the transfer, as commitment, identity, trust and dependency are all positively correlated to this success (Kostova, 1999).

As recently mentioned (cf. 2.5), the institutionalization of the practice at the recipient unit is a conceptualizing of the success of the transfer (Kostova, 1999). This is in line with the argument of Thomas (as cited in Vidal, 2007) that the local context in which the efforts of employee

participation are carried out is of great influence with regard to determining their success or failure. The recipient unit of this case is a Norwegian company, and it has a history of a high degree of employee involvement. These are both characteristics that closely relate to the Norwegian Model, which describes the main features of the Norwegian employment. The next subsection therefore provide an overview of research on the contextual importance of the Norwegian employment, which may serve as a basis for unravelling some of the reasons for the experienced difficulties in implementing Lean Enterprise.

2.5.2 The Norwegian Context

Norway's economic growth, also during the financial crisis, has led to increased interest worldwide of the main features of the Norwegian employment, thus the Norwegian Model (Løken & Stokke, 2009). In general, the Norwegian labour market is characterized by a need for labour in several sectors, technological development and demand for innovation, increased internationalization and employment immigration (NOU, 2010:1). Competing globally is a challenge for Norwegian manufacturing firms due to a relatively high level of taxes and salaries, long distance to the markets, and small manufacturing enterprises (Levin et al., 2012). In spite of this, the Norwegian economy is generally seen as successful among economists (Ekman, Gustavsen, Asheim, & Palshaugen, 2011). In fact, in World Economic Forum's latest Global Competitiveness Index 2013-2014, Norway ranked as number 11 (WEF, 2013).

The Norwegian Working Environment Act regulates the right of a meaningful work situation through participation (Løken & Stokke, 2009). Consequently, Norwegian firms tend to pursue democratic leadership, where success is said to be achieved through involving employees. This entails involvement in defining the content of the change processes, but also with regard to decisions-making. Such involvement does not necessarily regard whether or not the changes should be made, but rather how they should be implemented and complied with the daily work (Levin et al., 2012). Further, the Norwegian informal work environment could facilitate collaboration between hierarchical levels, as management and the trade unions are often capable of handling both conflicts and collaboration at the same time. The relationship between the management, the union representatives, and the employees is characterized by mutual trust, and blue-collar workers have relatively high competence, promoting independence and the capability of taking responsibility in the day-to-day work (Levin et al., 2012).

Løken, Stokke, and Nergaard (2013) further describe the Norwegian Model as characterized by strong workers and employers' organizations, and by close cooperation between the government, employers' associations and trade unions. There is also a strong co-determination and participation at enterprise level, hence broad participation (Toulmin & Gustavsen, 1996). Similarly, Levin et al. (2012) argues that the most central elements in leadership within the Norwegian Model could be summarized in the following characteristics: Fundamental accept of trade unions, conflict and cooperation in coexistence, trust, discrete authority, direct communication and common behaviour and expectancies regarding independence and autonomy.

Consequently, strong collaboration between employers and employees is a fundamental part of the Norwegian Model (NOU, 2010), and the co-determination and participation is seen as one of the most important competitive advantages for the Norwegian employment (Levin et al., 2012). When it comes to trade unions, Abrahamson (1996) proposes that "the ebb and flow of management fashions will be related to labour strife and labour union activity" (p. 274), implying that trade unions also influence the implementation and application of management concepts.

Pettigrew (1985) emphasizes the importance of taking into consideration the interplay between ideas about the context of change, the process of change, and the content of change when doing research on organizational change (cf. 2.1.1). When implementing a standardized management concept cross-border within an MNC, the literature review has shown that it should not be purely transferred, but rather translated with regard to these aspects.

2.5.3 Translation rather than transfer

In the 1970s and early 1980s, the Toyota Production system, the harbinger of lean, was perceived by many researchers as too inherent with the Japanese local context, making it hard to implement and make use of it in other parts of the world (Dohse, Jürgens, & Nialsch, 1985). Later, the question was raised as to how to make this transfer possible, as Japanese manufacturers began to establish factories in the USA. As previously mentioned, there are several different perspectives regarding this matter. Ritzer (1996) argues that transfer of such management concepts leads to a high degree of standardization, making the cultural differences less affective. Czarniawska and Sevón (2005) use the term translation instead of transfer, which describes how management ideas "travel" from one location or context to

another. They argue that “a thing moved from one place to another cannot emerge unchanged, to set something in a new place is to construct it anew” (Czarniawska & Sevón, 2005, p. 8). This perspective can be seen as closely related to the argument of Lillrank (1995); that complex systems not transfer well in their original packaging.

The distance as a metaphor was also used by Kostova (1999), in her description of organizational practices as “infused with meaning” when a practice becomes a basis for organizational identification (cf. 2.5). In the example provided from Lillrank (1995), wherein employees sing a company song, it is “infused with meaning” within its original context, but not necessarily when transferred to a context with different values and norms. Kostova’s (1999) concept of institutional distance serves as an alternative to focusing mainly on culture, as it also takes into account institutional practice. The greater the institutional distance the harder it is to transfer a practice without changing it, and when pure techniques are transferred, they may not fit the local environment and will be interpreted differently (Kostova, 1999). Kostova (1999) further claims that the success of the transfer depends, among other factors, on the extent of the institutionalization of the practice at the recipient unit. The idea of institutionalization includes both the implementation and the following internalization, with the implementation being defined as the degree to which the workers are following the formal rules. Internalization is the phase where the workers create symbolic meaning to the practice (Selznick, 1957), or as Kostova (1999) put it; when the practice is infused with value. A transfer of a concept can thus not be considered successful merely on the basis of the workers following a set of given rules. When it comes to companies applying lean, physically using the given tools derived from this concept does not necessarily imply a successful implementation, as the idea behind them must be understood by the ones using the tools.

In order to be able to translate a management concept, rather than simply transferring it, one must therefore gain an understanding of the subsidiary company, and its employees who are in many ways the final “consumers” of the given management concept. This is the topic of the next – and last – section of this literature review.

2.6 Communities of practice

Returning to the research question, we are not only to examine the transfer of the management concept from the headquarters to the recipient unit. Eventually, employees in a variety of units and hierarchical levels are the ones to use Lean Enterprise in their day-to-day work. The analysis should therefore evaluate communities of practice within the company, assessing the impact of such social configurations on the implementation of the management concept. This part of the literature review presents theory on communities of practice, as well as our proposals for how to identify, compare, and describe a community of practice.

2.6.1 Background

Debates on organizational learning has in the last decades been highly influenced by the community of practice perspective (Easterby-Smith, Crossan, & Nicolini, 2000; Gherardi, 2009). Lave and Wenger (1991) showed how collective learning in organizations is interwoven with identity, artefacts, language, morality and patterns of socialization leading to the production and reproduction of work communities, challenging the cognitivism and individualism of much classical organizational theory. Their work thus marks a shift from seeing the individual as a learner to perceiving learning as a process of participation in communities of practice, hence from an individual to a social approach on learning (Easterby-Smith et al., 2000).

Lave and Wenger (1991) initially coined the term communities of practice when developing a new model of learning while studying apprenticeship. At this point they did not propose a clear definition; it is rather perceived as an “intuitive notion” requiring “more rigorous treatment” (Lave & Wenger, 1991, p. 42). They further introduced the term legitimate peripheral participation, describing how engagement in social practice entails learning as an integral constituent. As of today, there is a great variation in the usage of the term community of practice (Cox, 2005). Wenger (1998) provided the first definition by introducing a set of three dimensions of the relation by which practice is the source of coherence of a community; mutual engagement, joint enterprise, and shared repertoire. Later, communities of practice were defined as “groups of people informally bound together by shared expertise and passion for a joint enterprise” (Wenger & Snyder, 2000, p. 139). Wenger and Snyder (2000) further explained that these communities “as diverse as the situations that give rise to them. People in companies form them

for a variety of reasons” (p. 141). In their publication *Cultivating Communities of Practice: a Guide to Managing Knowledge*, Wenger et al. (2002) applied a more practical approach to the community of practice perspective, as they proposed the following definition:

Definition (Communities of practice): “(...) groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis (Wenger et al., 2002, p. 4).

Polanyi (1966/2009) argues that individuals possess knowledge that we are not able to verbalize, hence what is called tacit knowledge. The basis is that humans are learning all the time, also when they are not aware of it themselves. This makes it difficult to assess the knowledge each individual has achieved, and it needs to be transformed from implicit to explicit in order to manage to communicate the knowledge to the rest of the organization (Nonaka & Takeuchi, 1995). Nonaka and Takeuchi (1995) propose four basic processes of knowledge conversion; socialization, externalization, combination and internalization. In other words, the processes of developing and spreading knowledge must be identified and conceptualized by increasing both explicit and tacit knowledge (Klev & Levin, 2012). Systems for developing knowledge must consider the interplay between the implicit and explicit knowledge, how it can be imparted with the rest of the organization, and finally, how it can be internalized by the other organizational members and be a part of the mutual knowledge basis within the organization (Jacobsen, 2012). Consequently, the organization is not only learning and developing, but also able to innovate and meet the future challenges in the fluctuating environment (Jacobsen, 2012; Klev & Levin, 2012). Understanding and cultivating communities of practice thus help manage tacit knowledge.

Development of community of practice theory has primarily focused on understanding the internal dynamics of communities (Gherardi, Nicolini, & Odella, 1998; Nicolini, Yanow, & Gherardi, 2003). Hence, commentators have argued that the communities of practice have not been adequately situated within the wider organizational context (Roberts, 2006). The managerialist approach has been to explore and advise how an organization may reconstitute itself as a ‘community of communities of practice’ and learn how to nurture and cultivate learning processes (Wenger et al., 2002). Referring to the benefits of information sharing in a social configuration, Lesser and Prusak (2009) argue that investing in developing communities of

practice generates positive outcomes for the organization. Wenger and Snyder (2000) realized that due to its intangible output, knowledge, the community of practice perspective might be perceived as just another management fad. However, they emphasize that this is not the case, as they argue that they have witnessed communities of practice improve organizational performance at a range of diverse companies and at different points in time (Wenger & Snyder, 2000).

A more sociological approach to the contextual problem is to explore how communities of practice co-exist in tension with competing institutions, institutional logics, corporate restructuring and pressures for standardization and rationalization (Cox, 2005; Pemberton, Mavin, & Stalker, 2007). Ingvaldsen (forthcoming) has recently argued that within capital intensive sectors, long term tendencies of rationalization may undermine community of practice reproduction and its associated learning mechanism. Rationalization tends to make knowledge explicit and standardize work routines in order to make them manageable and objects of cumulative 'continuous improvement' (Anand et al., 2009). Such an increased focus on formal procedures can be incompatible with the informal, mutual learning processes described within communities of practice theory. Exploring the dynamics that occur within a community of practice when being faced with a management concept is therefore an important part of the total analysis.

2.6.2 Dimensions of practice as the property of a community: A mutual engagement, a joint enterprise, and a shared repertoire

Wenger (1998) claims that associating practice and community does two things. First, it yields a more tractable characterization of the concept of practice. Second, it defines a special type of community, namely a community of practice. He further emphasizes that the term 'community of practice' must be viewed as a unit since its constituent terms specify each other in the way just described. As mentioned in the above subsection, there are three dimensions of the relation by which practice is the property of a community; mutual engagement, a joint enterprise, and a shared repertoire of ways of doing things (Wenger, 1998).

Practice does not exist in the abstract, but rather as a result of people being engaged in actions whose meanings they negotiate with each other. Wenger (1998) argues that the first dimension,

mutual engagement, is what defines a community of practice. A community of practice is not merely an aggregate of people who are defined by some shared characteristics, that is, community of practice is not a synonym for group or network. Any practice needs that which makes mutual engagement possible. This is as much a matter of diversity as it is a matter of homogeneity. Sustained mutual engagement connects participants to each other in complex ways, in ways that can become deeper than connections due to social categories or personal features. Terms associated with this dimension are engaged diversity, doing things together, relationships, social complexity, community, maintenance (Wenger, 1998).

The second dimension, *joint enterprise*, is an enterprise that keeps a community of practice together. It is the result of a collective process of negotiation that reflects the full complexity of mutual engagement. It is defined by the participants in the very process of pursuing it, as it is their negotiated response to their situation. In this way the defining of a joint enterprise cannot be described as a static agreement. It is a resource of coordination, of sense-making, of mutual engagement, and Wenger (1998) describes it as being part of practice in the same way that rhythm is part of music; not random, but not constant either. Negotiated enterprise, mutual accountability, interpretations, rhythms, and local response are key terms in this dimension (Wenger, 1998).

The *shared repertoire* is the third dimension of a community of practice. Elements of the shared repertoire may have been produced by the community itself, or adopted in the course of existence and become part of its practice. It is due the fact that the elements of the repertoire belong to the practice of a community pursuing an enterprise that they gain their coherence. That is, the coherence is not gained in and of these elements themselves. The repertoire is a combination of reificative and participative aspects. It becomes a resource for the negotiation of meaning as it combines the two characteristics of reflecting a history of mutual engagement and remaining inherently ambiguous. The shared repertoire includes such as routines, words, tools, stories, tools, artifacts, styles, language, historical events, concepts, discourses, ways of doing things, and actions (Wenger, 1998; Wenger et al., 2002).

Identifying these three dimensions can be difficult, and a more detailed way of structuring the characteristics of a social configuration can be carried out by looking at a set of indicators. Such a classification is provided by Wenger (1998) and presented in the following subsection.

2.6.3 Indicators that a community of practice has formed

Different groups of individuals constitute what can be called social configurations. Neither can every imaginable social configuration be called a community of practice, nor can the concept be encumbered with too restrictive definition. The first would leave the concept without meaning, whereas the latter would make it difficult to use. In order to articulate to what degree, in which ways, and to what purpose it is useful to consider a social configuration as a community of practice, Wenger (1998) addresses the scope and limits of the concept.

As an analytical tool, the concept is neither a specific, narrowly defined activity or interaction nor a broadly defined aggregate that is abstractly historical and social. Indicators that a community of practice has formed would include: (1) Sustained mutual relationships - harmonious or conflictual, (2) shared ways of engaging in doing things together, (3) the rapid flow of information and propagation of innovation, (4) absence of introductory preambles, as if conversations and interactions were merely the continuation of an ongoing process, (5) very quick setup of a problem to be discussed, (6) substantial overlap in participants' descriptions of who belongs, (7) knowing what others know, what they can do, and how they can contribute to an enterprise, (8) mutually defining identities, (9) the ability to assess the appropriateness of actions and products, (10) specific tools, representations, and other artifacts, (11) local lore, shared stories, inside jokes, knowing laughter, (12) jargon and shortcuts to communication as well as the ease of producing new ones, (13) certain styles recognized as displaying membership, and (14) a shared discourse reflecting a certain perspective on the world (Wenger, 1998, p.125). According to Wenger (1998), the presence of these indicators implies that the social configuration can be treated as a community of practice, as the three fundamental dimensions (cf. 2.6.2) also are present to a substantial degree.

2.6.4 Identifying communities of practice

As indicated in the previous subsections, working at the same location is not sufficient for being identified as a community of practice and neither is a shared working title or a shared set of tasks in itself. In order to answer the research question, one must be able to identify a community of practice on which further analysis can be based. The issue is thus how such identification could be done; hence first part of subordinate question 4.

Wenger's (1998) 14 indicators constitute a basis for discerning the formation of communities of practice (cf. 2.6.3), and Cox (2005) argues that these do to a substantial degree clarify the nature of the concept. In spite of this, Cox (2005) also specifies that surprisingly few subsequent researchers have referred to this list of indicators. Neither does Wenger (1998) explain which indicators must be present in order for a given social configuration to be treated as a community of practice, nor how many. What he does state, however, is that all communities of practice are combinations of three dimensions; a mutual engagement, a joint enterprise, and a shared repertoire (cf. 2.6.2). For this reason, communities of practice are social configurations in which all dimensions are represented. The 14 indicators, however, provide a more practical approach for systematically looking for signs of a community of practice. We therefore propose a categorization of these indicators (rows) with respect to the different dimensions (columns), as illustrated in Framework A.

This classification is thus our proposal with respect to the descriptions of the dimensions (cf. 2.6.2) and the indicators (cf. 2.6.3) of communities of practice. This is presented in figure 1 as Framework A. Some of the indicators are considered representing two dimensions, and when identified in a specific case both are coloured according to the description in the figure. We realize, however, that a potential critique to this categorization is that it implicitly implies a favouring of some indicators over others.

No.	Indicator	Mutual engagement	Joint enterprise	Shared repertoire
1	Sustained mutual relationships - harmonious or conflictual	<input type="checkbox"/>		
2	Shared ways of engaging in doing things together	<input type="checkbox"/>	<input type="checkbox"/>	
3	The rapid flow of information and propagation of innovation	<input type="checkbox"/>		
4	Absence of introductory preambles, as if conversations and interactions were merely the continuation of an ongoing process	<input type="checkbox"/>		<input type="checkbox"/>
5	Very quick setup of a problem to be discussed	<input type="checkbox"/>		<input type="checkbox"/>
6	Substantial overlap in participants' descriptions of who belongs	<input type="checkbox"/>		
7	Knowing what others know, what they can do, and how they can contribute to an enterprise	<input type="checkbox"/>		
8	Mutually defining identities	<input type="checkbox"/>		
9	The ability to assess the appropriateness of actions and products		<input type="checkbox"/>	
10	Specific tools, representations, and other artifacts			<input type="checkbox"/>
11	Local lore, shared stories, inside jokes, knowing laughter			<input type="checkbox"/>
12	Jargon and shortcuts to communication as well as the ease of producing new ones	<input type="checkbox"/>		<input type="checkbox"/>
13	Certain styles recognized as displaying membership	<input type="checkbox"/>		<input type="checkbox"/>
14	A shared discourse reflecting a certain perspective on the world		<input type="checkbox"/>	

= Indicator is identified

Figure 1: Framework A – Identifying communities of practice

The list of indicators can be used for detecting specific characteristics, while the dimensions are used as assessment criteria when establishing whether a given configuration is in fact a community of practice. Only when all dimensions are represented, the latter is true. Consequently, this framework constitutes the necessary theoretical foundation for answering the first half of subordinate research question 4: “How could social configurations be identified as communities of practice?”

However, we also realize that the number of indicators within each dimension is of high importance. For this reason, we argue that an alternative framework must be developed, enabling the analysis to answer the second half of the subordinate research question: “how could they [communities of practice] be compared?” This is the topic of the next subsection.

2.6.5 Comparing communities of practice: The community of practice profile

Having identified social configurations that can be considered communities of practice, a comparison of these can reveal the most distinctive one, hence answering the second part of subordinate question 4. In this thesis the selected community of practice forms the basis for the further analysis of the main research question.

Communities of practice can exist in various forms with respect to the relative strength of present dimensions, as identified when applying Framework A (cf. 2.6.4). Our proposal is that the relative strength can be calculated as the relation between the number of present indicators and the total number of indicators within each dimension respectively:

$$\text{relative strength} = \frac{\text{no. of present indicators within the dimension}}{\text{total no. of indicators within the dimension}}$$

There are, as an example, a total of six indicators within the shared repertoire. The relative strength of dimension can thus be calculated as $x/6$, where x represents the number of present indicators within this dimension.

Illustrating the variations in a sample of social configurations, we have developed Framework B based on Wenger’s (1998) indicators and elements, which displays what we have chosen to call the ‘community of practice profiles’:

	Mutual engagement	Joint enterprise	Shared repertoire
Social configuration 1			
Social configuration 2			
(...)			
Social configuration (n-1)			
Social configuration n			



Figure 2: Framework B – Community of practice profiles

The squares are to be coloured in different shadings with respect to the relative strength of each dimension. For reasons of simplification we have introduced four levels of shadings. If more than two-thirds of the indicators within a given dimension are present, the square is coloured dark blue. A semi-dark blue colour is used when more than one-third and up to two-thirds of the indicators are present. Similarly, when more than zero and up to one-third are present, a light blue colour is used. If no indicators are present within a given dimension, this square is not coloured. For this reason, if one or more elements are left blank, the profile illustrates a social configuration that cannot be treated as a community of practice, as argued in the preceding subsection (cf. 2.6.4).

Applying this framework on a set of identified communities of practice enables a structured comparison of them. In our case the “strongest” profile will be used later as an argument for

choosing a community of practice to be analysed with respect to the implemented management concept.

2.6.6 The three elements of communities of practice: The domain, the community, and the practice

The early publication of Wenger (1998) on this theme provided an in-depth description of learning theory where he introduced the concept of communities of practice (cf. 2.6.1). More recent literature from Wenger et al. (2002) widened the perspective on communities of practice by providing a more managerial approach to knowledge in organizations. In the book 'Cultivating Communities of Practice: a Guide to Managing Knowledge', they argue that all communities of practice, despite the variety of forms, share a basic structure. This is conceptualized through a set of three fundamental elements; "a domain of knowledge, which defines a set of issues; a community of people who care about this domain; and the shared practice that they are developing to be effective in their domain" (Wenger et al., 2002, p. 27). A given community of practice is a unique combination of these three elements.

Firstly, the *domain* is described as the element in which the common ground and a sense of common identity are created. That is, it is what affirms the value and purpose of the community. Wenger et al. (2002) emphasize this by stating that the domain of a community is its *raison d'être*; its reason for existence. Knowing the boundaries of the domain is what enables the members to know how to act within the community of practice (Wenger et al., 2002). The domain can range from very mundane know-how to expertise of a more specialized professional character, but it is not just an abstract area of interest. Rather, "it consists of key issues or problems that members commonly experience" (Wenger et al., 2002, p. 32). In short, the domain denotes the topic the community focuses on.

The second element, the *community*, is what creates the social fabric of learning. "It is a group of people who interact, learn together, build relationships, and in the process develop a sense of belonging and mutual commitment" (Wenger et al., 2002, p. 34). In order to build a community of practice, there must be continuous interactions between the members on issues important to the domain. When doing so, valuable relationships based on respect and trust are built. The community is an important element because learning not only is a matter of an intellectual

process, but also a matter of belonging; “involving the heart as well as the head” (Wenger et al., 2002, p. 28). Previously, the term community has also been described as “a limited number of people in a somewhat restricted social space or network held together by shared understandings and a sense of obligation” (Bender, 1978, p. 7).

Finally, the *practice* is the specific knowledge the community develops, shares, and maintains. It constitutes a shared set of frameworks, ideas, tools, information, styles, language, stories, and documents. These communal resources include both tacit and the explicit aspects. “This body of shared knowledge and resources enables the community to proceed efficiently in dealing with its domain” (Wenger et al., 2002, p. 29). The practice is thus a common foundation that enables community members to work together efficiently.

These elements are later used in a profound description of a community of practice in particular, and they also form a basis for the community of practice aspect of Framework C presented in the following section. It is worth mentioning that these more recently developed elements must not be mixed with the previously presented dimensions of subsection 2.6.2.

2.7 Communities of practice facing management concepts

Framework A, which was proposed in subsection 2.6.4, was developed as a means to identify communities of practice. Similarly, in order to enable a structured comparison of different communities of practice, subsection 2.6.5 presented Framework B which illustrates different community of practice profiles. The final subordinate research question aims to clarify the dynamics that occur as a consequence of a given community of practice being faced with a specific management concept. For this reason, the current section is dedicated to describing the third and final proposed framework. The aim is to create a more structured means of analysis through narrowing the focus. In addition, the framework serve as a tool for uncovering otherwise hidden connections in a case study between both potential and experienced difficulties.

Combining theory on management concept with theories on communities of practice, Framework C is developed based on main ideas from these previous parts of the literature review. With respect to management concepts, Lillrank (1995) argues that the content of transfer should be understood with respect to the three categories of management transfer; management principles, organizational vehicles and tools techniques and tools (cf. 2.4). With regard to communities of practice, Wenger et al. (2002) describes these as combinations of three elements; domain of knowledge, community of people and shared repertoire (cf. 2.6.6). As these are essential for understanding the uniqueness of a given community of practice, they have been used for conceptualizing the community of practice aspect of the framework. Consequently, Framework C combines the three elements of communities of practice classified by Wenger et al. (2002) with Lillrank's (1995) three categories of management content.

By applying the framework in figure 3, various findings of a case study can be classified and further analysed with respect to one particular element of the community of practice (columns) and one specific category of content of the management concept (rows). The examples of the respective elements and contents, as illustrated in this figure, derives from subsection 2.6.6 and 2.4.2, and are included as an effort to make the application more understandable.

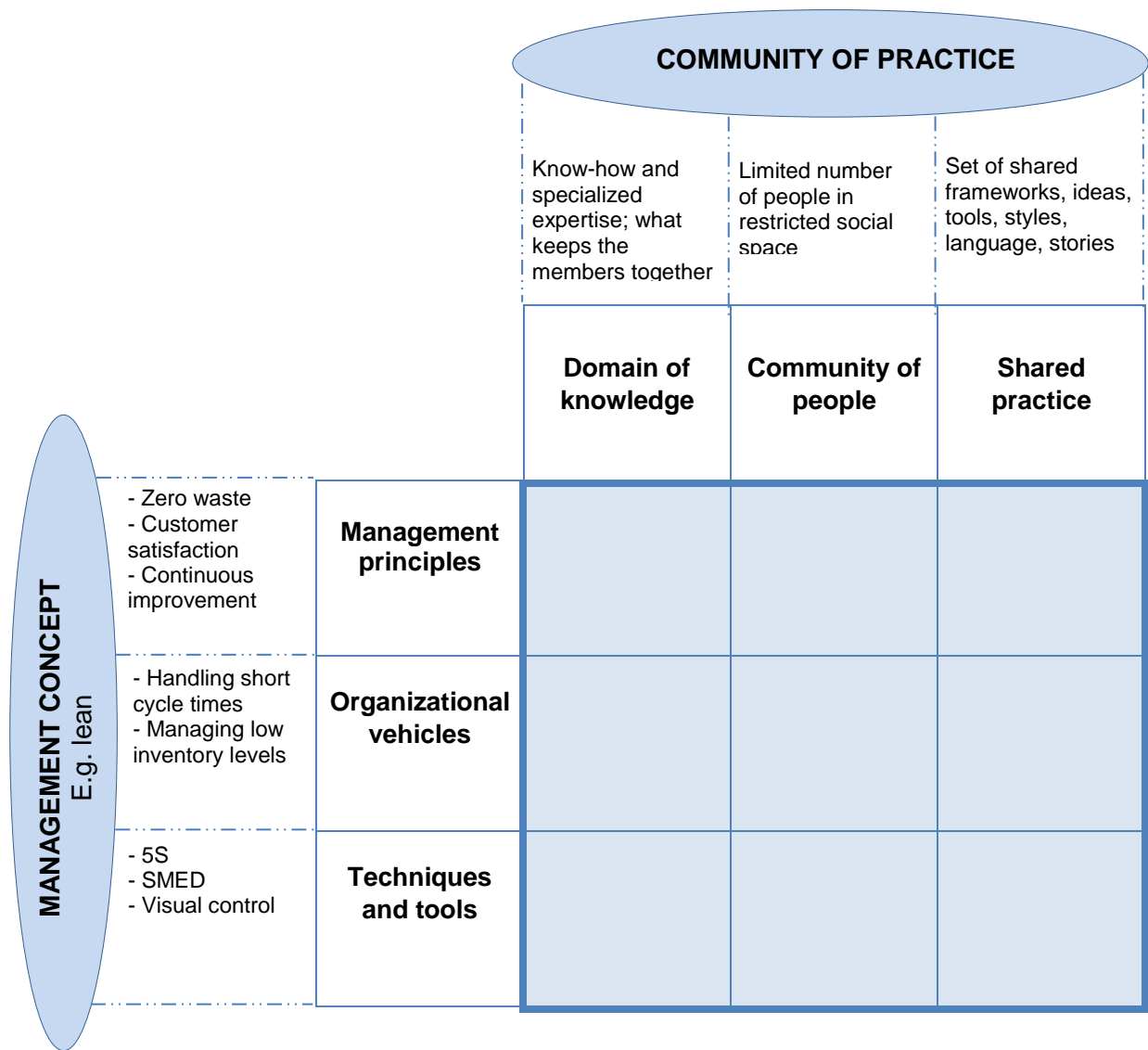


Figure 3: Framework C – A community of practice facing a management concept

2.8 Comments on the literature review

Organizational change is crucial due to ever-increasing fluctuations in business environments. There are mainly two different approaches to organizational change, taking on either a top-down or a bottom-up perspective of change leadership. Repeated and excessive efforts of change could lead to change fatigue, which is expected to have a negative impact on further change initiatives. Management concepts attract managers of organizations by promising success, and these are often referred to as management fads. The implementation of such concepts is, however, difficult, and as part of multinational corporations, the matter is even more complex. Firstly, existing research on implementation of management concept is scarce, and secondly, the cross-border impact is not examined thoroughly. Both the content and the contexts of the transfer must be taken into consideration when implementing a management concept that is transferred across national borders. Lean, being one of the most popular concepts in today's businesses, is not an exception. Companies constitute a range of different social configurations which can be identified as 'communities of practice', and the focus on these as a key to improve performance of organizations is under constant increase. In order to analyse the implementation with regard to a given community of practice, the literature review includes our proposed frameworks for identifying and comparing communities of practice, as well as a framework for examining its meeting with a given management concept. Only when understood, preferably by all employees impacted by the change, the knowledge of possible difficulties can be used proactively and reactively; increasing the probability of a successful transfer in the first place, and dealing with problems as they occur. The range of relevant theories implies that there is an extensive number of aspects influencing the degree of success in the transfer and implementation of management concepts to communities of practice within MNCs.

Chapter 3:

REFINED RESEARCH QUESTIONS AND STRUCTURE OF STUDY

3.1 Research question

The original research question as presented in the introduction is as follows: “What are the possible explanations for the difficulties in implementation of a management concept from a headquarters to a community of practice within the recipient unit of a multinational corporation?”. With respect to the particular case, this general research question could be specified as follows:

What are the possible explanations for the difficulties in implementation of Lean Enterprise from the headquarters to a community of practice within the Norwegian recipient unit of the multinational corporation?

Based on the literature review in chapter 2, the subordinate research questions from the introduction (cf. 1.3) can be further developed in the following way:

1. In what way does Lean Enterprise constitute a management fad, how can this concept be explained through Lillrank’s (1995) content categories, and how does this affect the implementation?
2. How could the change efforts be classified using Beer and Nohria’s (2000b) theory of strategy E and O, and how does this choice affect the outcome of the implementation of Lean Enterprise?
3. What considerations must be made with respect to different contexts as proposed by Kostova (1999), given the fact that it is an implementation cross-border from a headquarters to a recipient unit within an MNC?

4. Applying Framework A, which is derived from Wenger's (1998) theories, which of the selected social configurations in the case company can be identified as communities of practice, and applying Framework B, what does a comparison of these reveal?
5. Using Wenger et al.'s (2002) three elements of communities of practice, what are the important characteristics of the selected community of practice?
6. How can difficulties in the implementation be understood by using Framework C, that is, through the three managerial categories of content by Lillrank (1995) in combination with Wenger et al.'s (2002) three elements of a community of practice?

3.2 Structure of the study

The different subordinate research questions that were presented above are then addressed in each of the following chapters of this report, hence in chapter 5 to 10. The different analyses all expand on the previous ones, but focusing mainly on the specific topic of chapter. Each chapter includes a short section that provides concluding comments to the respective subordinate research question.

Chapter 5 starts with a brief introduction of Lean Enterprise and some common perceptions of it, in order to understand the characteristics of the management concept. Further, the concept is described on the basis of Lillrank's (1995) categories of content of the transfer, and the complementarity of the three categories is assessed in order to evaluate their influence on the implementation. Thus, chapter 5 provides answer to the first subordinate research question.

Chapter 6 examines the change strategy of the case company; answering the second subordinate question. This is done by explaining the chosen approach to the implementation, identifying in which way a strategy E or O approach have been chosen, as well as the responses to it by various employees. The analysis therefore regards how the choice of change strategy has affected the implementation.

As the implementation of the management concept regards cross-border transfer within a multinational corporation, chapter 7 provides an examination of the contextual aspects that may influence the result. Thus, the aim of this chapter is to answer subordinate research question 3. This is done by analysing important aspects on country, organization and individual levels;

applying Kostova's (1999) division into the social, organizational, and relational contexts, respectively.

In Chapter 8 we investigate three social configurations within the case company; the blue-collar, a specific unit named Department X and maintenance workers. Applying framework A, which is provided in subsection 2.6.4, we propose which of the social configuration can be treated as a communities of practice; hence addressing subordinate research question 4. Based on these findings, the chapter further provides community of practice profiles in the case company, illustrated by applying Framework B (cf. 2.6.5). This forms the basis for a brief comparison of the different communities of practice that have been identified. One of these is then selected for the further analysis in the next chapter.

A more profound analysis of this particular community of practice is provided in chapter 9. Building on the analysis in chapter 8, and leading up to chapter 10, the aim is to provide a more profound description of the community of practice. This is done by using Wenger et al.'s (2002) three elements of communities of practice (cf. 2.6.6). The chapter therefore answers the fifth subordinate research question.

By applying the framework C that is presented in section 2.7, the final subordinate research question is addressed in chapter 10. Here, the evaluation of the implementation is extended to gain an understanding of effects on, and by, a particular community of practice. Chapter 10 thus provides answer to the sixth subordinate research question.

All these examinations of the six subordinate questions in chapter 5 to 10 together enable an answer to the main research question. Consequently, by making connections between these analyses, chapter 11 presents the final conclusions to the study. These are finally articulated through five main findings.

However, before returning to the actual case study, chapter 4 gives a description of the chosen research methodology and its application.

Chapter 4:

METHODOLOGY

This chapter describes the methodology applied to analyse the case company and thus answer the research question. The methodological approach is explained in the first section. A description of the data collection is provided in section 4.2, including a table summarizing the different phases of the gathering of the empirical material. In section 4.3, the analysis of data and the articulation of the research question are described. Finally, the methodological strengths and weaknesses are discussed in section 4.4.

4.1 Methodological approach

4.1.1 Background

The work of this master's thesis initially derive from our work as assistants in a research project on Lean Production, a four year project supported by the Research Council of Norway and the participating enterprises. The main objective of the project has been to build research-based knowledge on lean within the Norwegian Employment, and to further develop a Norwegian model for lean (Brochure of lean project, May 2012). The Norwegian University of Technology and Science is one of the four research partners contributing to the project, something which has given us the opportunity to work closely with industry parties on present and relevant issues. The case company is one of six participating enterprises in the project, which are both from the industry and the service sector. As we have been able to collect empirical data from 2010 until the autumn of 2013, the methodological process for this thesis has been iterative rather than purely linear. In this sense, the research question was first articulated after much of the empirical data had already been gathered, which is further described in section 4.2. Due to the complexity of the research question, and the wide access to empirical material, we have chosen a case study with elements from ethnographic and action research. This is further explained in the following subsection.

4.1.2 Choice of methodology

As just mentioned, the choice of methodology has been highly influenced by our work as research assistants in the above described project. The research question, with its wide range of variables affecting the implementation, is truly a complex matter. As the implementation of the management concept is to be studied with respect to communities of practice within the case company, the objective of the study is to explore and understand a social phenomenon in terms of how the change is perceived by the workers themselves. This is in line with what Denzin and Lincoln (2000) argue, that the aim of qualitative research is to “study things in their natural settings, attempting to make sense of or interpret phenomena in terms of the meanings people bring to them” (p. 2). Furthermore, several other researchers (e.g. Langley, 1999; Yin, 2013) argue that, when analysing such complex phenomena, qualitative research is well-suited. For these reasons, we have chosen to apply a qualitative research methodology in this thesis. In this way, it enables to take into consideration different contexts of the case by using a variety of empirical material (Denzin & Lincoln, 2000; Langley, 1999; Yin, 2013).

The research has been carried out through a comprehensive study of the case company, involving most units at this subsidiary. The aim has been to uncover the reasons for the experienced difficulties in the change process at this specific company; hence the question concerns “why” these difficulties have occurred. The implementation aspect of the research question is a contemporary phenomenon, where we as researchers have no control over behavioural events. Consequently, a case study method was chosen, as all these factors is in alignment with Yin’s (2013) requirements for this research method being the preferred one. Since the aim of the research question is to provide explanations for the difficulties experienced by the case company, hence explaining why these conditions came to be (Yin, 2013), it could be defined as an explanatory case study. When applying a case study approach we are able to analyse such a complex phenomenon and the present dynamics and social processes (Eisenhardt, 1989; Langley, 1999), by doing what Swanborn (2010) argues; “to clarify the intricate web of social relations, perceptions, opinions, attitudes and behaviour” (p. 41). Another advantage with case study as research method is that it allows analysis of organizations over time (Wacker, 1998), which has been beneficial as this work has been carried out during a period of several years within the research project on Lean Production. Case studies are also fruitful for research areas where existing theory is considered inadequate (Eisenhardt, 1989)

This is the case for our study, as we combine of the themes of organizational change, management concepts, multinational corporations and communities of practice. Moreover, the boundary between the phenomenon studied, the communities of practice facing the management concept, and the context around is not clearly evident. This is, according to (Yin, 2013), another reason for applying a case study.

However, as Wacker (1998) argues; no single research category is in general superior to another. In order to get the benefits from multiple research categories, we have chosen to incorporate several aspects of qualitative research. First of all, by applying a case study, we have been able to investigate a “contemporary phenomenon in depth and within its real-world context” (Yin, 2013, p. 16). However, as the research question concerns the tension between the management concept and the community of practice, it is necessary to obtain in-depth insight into this intricate phenomenon. Furthermore, as the objective concerns the actual implementation, it is essential to follow the implementation thoroughly, and over the time it takes. Like explained in the literature review, tacit knowledge plays an important role in theory on communities of practice (cf. 2.6.1), and such tacit knowledge could not be assessed through questions nor observed at a glance; it needs to be experienced. For these reasons, ethnographic research has also been conducted as part of the data collection of the case study, which is what Yin (2013) defines as a source of evidence called ‘participant-observation’. This enables an in-depth understanding of the culture of the community (Rossman & Rallis, 2011), and also of the member's behaviour within the context of that particular culture, which Bryman (2008) describes as another advantage of ethnographic research. Through our participation in the research project on Lean Production, we spent a period of three weeks in May 2013 as short-term employees at the shop floor of a unit. Although the main reason for the stay was to assist in conducting work instructions, this work truly enabled us to closely study the dynamics at this particular unit.

As explained, our short-time employment was an effort to assist the case company in handling what they considered a challenging task; hence the work instructions. In general, the researchers within the research project have worked together with the case company to improve their performance for several years. For this reason, action research has also been relevant in approaching the study. Action research initially derives back to the concept of organizational learning (Rolfesen & Knutstad, 2007), which was shortly introduced in 2.1.1, and according to

Reason and Bradbury (2001) action research is “a participatory, democratic process concerned with developing practical knowledge knowing in the pursuit of worthwhile human purpose, grounded in participatory worldview” (p. 1). By examining the difficulties in the implementation of the management concept, we hope that we as researchers with findings from our master’s thesis could contribute to improvements for the case company also in the future.

4.2 Data collection

Qualitative research facilitates both the collection and the use of a variety of empirical material (Denzin & Lincoln, 2000). Our data-gathering process has not been linear nor rigid, which is in line with how Rossman and Rallis (2011) describe qualitative research. This is, in our case, mainly due to the fact that the empirical data for this thesis has primarily been gathered through years of working with the research project on Lean Production, thus also prior to writing this thesis. Yin (2013) argues that no single data source has an advantage over the others, but that they have to be understood as complementary. Case studies facilitate the use of a wide range of data sources (Denzin & Lincoln, 2000; Yin, 2013), and combining several sources of evidence has thus been done to improve the credibility of our study, as later argued in subsection 4.4.1. In order to provide a profound empirical background we have mainly chosen a combination of five methods for data collection, in line with Yin’s (2013) suggestions of different sources of evidence; direct observations, interviews, participant-observation through our short-time employment at the plant, and finally archival records and other documents. The following subsections describe in detail the sources that have been used as part of the data collection.

4.2.1 Overview of gathered data

An overview of the data gathered in the period of 2010 to 2013 is summarized in table 2. The different sources of data are described thematically in the following subsections.

Period of time	Circumstances	Data gathered
March 2010	Semester paper	Observation studies Presentations
November 2011	Lean Research Project	Field notes from co-workers
July 2012	Co-worker as short-term contracted worker in the production	Field notes from co-worker
October 2012	Lean Research Project	Interviews: 120 Observation studies Informal meetings and discussions
February 2013	Semester paper	Observation studies Presentations
March 2013	Lean Research Project	Presentations Status report
May 2013	Short-term contracted workers at the shop floor through Lean Research Project	Observation studies Informal meetings and discussions
July 2013	Lean Research Project	Field notes from co-workers
October 2013	Lean Research Project	Observation studies Informal meetings and discussions

Table 2: Methodology – Gathered data

4.2.2 Direct observations: Company visit as part of university courses

In the spring of 2010, shortly after the change in ownership, we visited the case company for the first time as students in a course on organizational theory at NTNU. We have thus followed the company and the change efforts over a period of several years. Later, as part of the course Change Management at in February 2013, this particular company was again part of the case of a semester assignment, also then with main focus on the current implementation efforts. Such observational evidences are fruitful as they cover the actions and the context in the actual time of occurrence (Yin, 2013). However, despite the time and cost-consuming factors, Yin (2013) argues that there is a risk that some of these “actions may proceed differently as they are being observed” (p. 106).

4.2.3 Interviews

In October 2012 we, together with two other researchers within the project on Lean Production, carried out interviews with 120 employees at different levels and units of the company. Most interviews were recorded and later transcribed, making precise quotations possible. In line with the aim of the research project, the objectives of the data gathering were initially not to test specific hypotheses, but rather to get an overview of the current status of the company to be able to describe lean work within Norwegian industry. Consequently the empirical material from these interviews was not gathered with the current research question in mind, but rather to examine topics like organizational challenges, team organization, job rotation, production goals within the different units and the current and previous improvement work at the plant.

The interview dates were set in advance, in cooperation with the case company, and the interviews were conducted during three days at the workplace of the interviewees. The respondents were informed that the data was collected through a research project on Lean Production and in collaboration between the company and the university. The interviewees were asked prior to the interviews whether or not tape recorder could be used in order to transcribe the conversations afterwards, on the conditions that the files were deleted immediately afterwards. This was accepted by all interviewees. The interviewees were selected somewhat randomly as we passed by in their work environment. For practical purposes, most of them were interviewed in separate rooms, although some were held in groups of workers due to time limits.

In order to get insight from different perspectives and actors within the organization, we talked to both managers and other administrative workers to operators, and at most units at the case company.

The interviews were semi-structured, and followed what Yin (2013) describes as shorter case study interviews. The main characteristic of such an approach, is that it is “open-ended and assume a conversational manner” (Yin, 2013, p. 111). An advantage is that the interviewee can speak more freely and elaborate on his or hers answers. Further, if the interviewer senses that more information can be found on a given subject, he or she has the opportunity to ask follow-up questions (Kvale, Anderssen, & Rygge, 1997). Possible disadvantages with interviews as a source of evidence are “bias due to poorly articulated questions, response bias, inaccuracies due to poor recall, reflexivity – interviewee gives what interviewer wants to hear” (Yin, 2013, p. 106). The latter could be due to lack of trust to the interviewer, or that the interviewee chose to answer based on what he or she considers is appropriate or inappropriate answer (Kvale et al., 1997). When using a tape recorder there is also a risk of errors due to the fact that the interviews are transcribed manually to written texts (Kvale et al., 1997). Lastly, it should be mentioned that such interviews are a relatively time-consuming process. It has thus been of great advantage for us that we have been able to conduct these through a several-year-long research project.

4.2.4 Participant-observation: Ethnographic study

Due to the nature of the research question, obtaining a profound insight into the tension between the management concept and the community of practice was perceived as necessary. In-depth knowledge of the case company was further gained through the short-term employment in May 2013. During this stay, we were present as the concept was first to be implemented at the particular unit, which gave us the unique opportunity to follow the process. As described in 4.1.2, we obtained a profound and valuable insight into the day-to-day activity at a small unit. By working closely with the operators, not only did we get valuable insight into their practices, but we also got to know them quite well in person. In total, we spoke to ten employees. We worked at the plant according to the role that Gold (1958) characterizes as participant-as-observer, in the way that the objective was to participate rather than to solely observe, and we were thus able to develop relationship with the workers over time. As

participant-observers, to build such trust with informants are important (Gold, 1958). Field notes were written continuously during our stay, as field notes are important for ensuring the memory of the experiences (Bryman, 2008). By being immersed in the social setting for such a period of time, we were thus able to make observations of the behaviours of members of the department, listen to and engage in their conversations, talk to the workers on interesting issues, and also collect documents about the group (Bryman, 2008). In October 2013, further follow-up data was gathered through observations and discussions with the employees, as we made a revisit to the same unit.

When it comes to the pros and cons for participant-observational studies, they are strongly related to the method of direct observation (Yin, 2013), and the fact that we also have had the opportunity of participating in the studied contexts studied. According to Yin (2013), the most distinctive opportunity with such an approach is the ability to perceive the reality from the viewpoint of someone inside in the organization rather than someone external. This stay provided us with significant valuable insight in the day-to-day situation, and not from arranged settings as when entering as external actors on a short visit. However, the challenges with such an approach are mainly related to the biases which could potentially be produced, for instance if the participation require focus at the expense of the observations and the risk of becoming 'supporters' of the organization (Becker, 1958). Another aspect that needs to be highlighted is related to the human behaviour. As in the case of interviews, employees might be reluctant to tell the whole and full truth when researchers, consultants or other external actors examine the current practices within their workspace (Yin, 2013). Such reluctance could, for instance, be due to underlying or personal reasons for holding back information, when being faced with external actors. As we spent three weeks working with the informants, in addition to the re-visit, this gave us the opportunity to get to know them fairly well. We are, however, aware that our short-term stay at the plant did not make us true parts of this social configuration, and has thus not provided us with absolute insight.

4.2.5 Archival records and documentation: Field notes from co-workers

Since we have worked as research assistants we have also had access to empirical material from other researchers to supplement our own findings. In the research project, data from the case company was first gathered in November 2011 by co-workers, both through observations

and interviews, and provided to us in the form of an extensive collection of field notes. In July 2012, a co-worker in the research project worked as a short-term contracted worker in the production in one of the units at the company. Field notes were provided to us afterwards. In March 2013, the company was presented with status of the research project, and we were provided with the presented material from this session. Moreover, after we had worked at the shop floor in one unit in May 2013, two co-workers continued our work, and provided us with follow-up data that was gathered during four weeks in July 2013. We have also had access to internal documents on the management concept of the case company. By having access to these field notes and documents, we have benefited from the advantage of using a numerous quantity of written material that covers a wide range of topics during a longer period of time (Yin, 2013). However, an important aspect to consider is that the field notes are conducted by fellow researchers, indicating a possible risk of reporting bias (Yin, 2013), as we have had to take for granted the accuracy of their findings and personal interpretations.

4.3 Analysing data and articulating the research question

As mentioned, the objective of the research project on Lean Production has been to examine lean in the Norwegian context. This was also the point of departure when we started gathering empirical material. Interesting findings and perspectives emerged when examining the transcribed interviews, the field notes and other documents for reappearing issues. Ideas for the themes of the thesis were eventually launched, and a literature review was conducted in order to gather interesting aspects from the theoretical point of view. A re-visit at the plant was, as mentioned, later arranged to confirm empirical findings and to gather some additional data. Finally, the research question was articulated based on the challenges observed within the case company. In this way the methodological process for this thesis could be characterized emergent and iterative; rather than linear, which is typical for qualitative research (Rossman & Rallis, 2011).

4.4 Methodological limitations and strengths

We have seen that qualitative research is well-suited when there are many variables to examine, the phenomenon to be studied is context-sensitive and where the aim is to understand this complexity (Denzin & Lincoln, 2000; Langley, 1999; Yin, 2013). However, in this section, the

methodological limitations are highlighted. This is primarily related to the quality of the study regarding the validity and reliability of the method. In this respect, Bryman (2008) emphasizes a distinction between evaluation of qualitative and quantitative research, as evaluation of these could be based on different criteria. Guba and Lincoln (1994) argue that an assessment of a qualitative research should be based on the 'trustworthiness' and 'authenticity' of the study. As this approach highlights different aspects that characterizes qualitative research in particular, we have chosen to use these alternative criteria, which are further developed by Bryman (2008), as basis for our analysis.

4.4.1 Trustworthiness

Bryman (2008) describes the trustworthiness through a set of four criteria; credibility, transferability, dependability, confirmability. These are examined in relation to our case study in this subsection.

The credibility concerns the degree of adequate causation between the theories developed and the observations (Bryman, 2008). It is, however, not always possible to distinguish between contemporary phenomena and their contexts (Yin, 2013). What might therefore be a limitation of this case study is the challenge of assessing the causal relationships in such a context-rich environment. In the case company, a wide range of factors are truly interconnected, and it is difficult, if not impossible, to isolate each of them in order to understand the studied contemporary phenomenon. However, as Swanborn (2010) argues, the contextuality of some measurements is accepted in case studies. A technique that we have used to strengthen the credibility of the study is 'triangulation'; hence using several sources of evidence, which is a major strength of case studies (Bryman, 2008; Yin, 2013). We have therefore been able to develop what Yin (2013) describes as "converging lines of inquiry" (p. 120), which means that the empirical data is 'triangulated' by using more than purely one data source in the study of the complex phenomenon (Bryman, 2008). In this way, "the multiple sources of evidence essentially provide multiple measures of the same phenomenon" (Yin, 2013, p. 121), hence we have been able to confirm the same findings from different perspectives. By participating in the research project and being able to work at the plant, we have also had a unique opportunity to gather information from most of the units at the plant, as well as from the different hierarchical levels. This has provided valuable insight into the different perceptions that have evolved in the

company. The fact that we have been able to use empirical material gathered over a period of several years, and to use several sources of evidence, such as documentation, interviews, direct observations and participant-observations, is thus likely to add to the strength of our study.

The transferability concerns the generalizability of the findings, thus “the extent to which the findings from a case study can be analytically generalized to other situations” (Yin, 2013, p. 238). The limited possibility of generalizing from this type of research is a common limitation for case studies (Yin, 2013), and the answer to whether or not it is possible to generalize from a single case study is in fact not a simple one (Kennedy, 1979). Yin (2013) argues that case studies are not generalizable regarding extrapolation of statistical probabilities, but that it is possible for theoretical propositions. We have not explicitly developed propositions; however, we do propose that our theoretical frameworks are perfectly applicable for other case studies on similar topics. Frameworks A and B can be used whenever communities of practice need to be identified and compared as part of a study. Framework C, being more detailed, can be used when examining the transfer of management concepts cross-border to communities of practice within subsidiaries of multinational corporations. The case study, with its thorough descriptions, could also be perceived as what Bryman (2008) describes as “rich accounts of the details of a culture” (p. 378), where it is up to others to assess and make use of relevant elements of the thesis in other contexts.

The dependability concerns that “complete records are kept of all phases of the research process (...) in an accessible manner” (Bryman, 2008, p. 378). This can therefore be seen in relation to what Yin (2013) defines as reliability of the study and the consistency of the used procedures. We have gathered empirical data on the case company since 2010, through field notes from direct and participatory observations, documents, archival records and documents, implying that we have had an immense set of data. To maintain a chain of evidence and increase the reliability of the study, Yin (2013) argue that an “external observer should be able to trace the steps in either direction” (p. 127). For this reason, we have developed a case study database, where all written documentation have been stored electronically and sectioned after the time of collection; hence improving the dependability of the study. The idea is that this database could be made available for other researchers, enabling an examination of the findings.

Regarding the confirmability of the study, it is impossible in social research to achieve complete objectivity (Bryman, 2008). One aspect of the confirmability of our study is the degree to which our system of concepts has been used in an objective manner. In the development of the literature review, we have mainly used concepts and ideas that are well established. However, one could question the use and understanding of the slightly more ambiguous term 'community of practice'. As a measure for improving this confirmability, the concept was thoroughly explained in the literature review before being applied as a basis for the developed frameworks. Furthermore, having cooperated with the case company for years, we have gotten to know some of members of the organization quite well. Especially within ethnographic research, Gold (1958) stresses that there is a risk of the researcher and the informants to become too close friends, which could lead to the informants turning to act like merely observers themselves or the researchers becoming 'too native'. There is a possibility of this unconsciously affecting the neutrality of our study. Another important aspect to highlight is that the collection of data was conducted before the research question was articulated. In this way we have used empirical data which was not gathered with the specific research question in mind, but was rather intended to shed light on other, and generally broader, aspects. This is specifically important considering the hundred interviews conducted in October 2012, where the questions were aimed to measure a wide range of general issues and difficulties at the case company. Consequently, it has been important to avoid taking the empirical material out of their original context. However, the fact that we had not specified the research question at this point, made us open to conduct the research with an open mind, and rather according to the recurring issues of the case company. In this way, the risk of acting based on personal opinions and propensity is assumed to have been reduced.

4.4.2 Authenticity

In addition to the criteria that constitute the trustworthiness, Bryman (2008) describes the authenticity through another set of criteria; fairness and ontological, educative, catalytic, and tactical authenticity. Rather than merely focusing on the application of the research method, these criteria aim to evaluate outcomes and political impact of the inquiry (Bryman, 2008; Guba & Lincoln, 1994; Lincoln & Guba, 2000).

Lincoln and Guba (2000) describe fairness as concerning the quality of balance, arguing that

perspectives from all stakeholders should be included. On the one hand, we have had a unique opportunity to gather information from most of the units at the case company as well as perspectives from different stakeholders in various hierarchical levels of the organization. On the other hand, the interviewees in 2012 were selected somewhat randomly, and we did not get the opportunity to talk to all operators of the specific unit during the short-term employment in 2013 as a couple were on sick leave. In general, however, by working in the research project, we have been able to cover the perspectives of a high number of informants, which is assumed to have strengthened the study's authenticity through fairness. It is further assumed that the latter four criteria; ontological, educative, catalytic, and tactical authenticity, must be evaluated subsequent to the completion of this report as they assess the actual outcome of the study. For this reason they are not further addressed here, but they are considered important factors in relation to the further change efforts at the case company.

Chapter 5:

THE MANAGEMENT CONCEPT

As was described in the introduction, the current organizational change of the case company regards the implementation of a production system, or rather a management concept, as a consequence of a recent change in ownership. This concept, which is developed by the corporate management, is based on main elements from lean; hence the term Lean Enterprise is applied. All companies within this multinational corporation are expected to implement the concept (cf. 1.2), and the corporate manager explains that through the use of Lean Enterprise they want “to establish a permanent foothold of the principles of a lean production in the productive (shop floor) area as well as in the administration” (Corporate manager, Internal document, Lean Enterprise Brochure, p. 3).

In order to understand the characteristics of the management concept, as highlighted in subordinate research question 1, this chapter first addresses Lean Enterprise on the basis of literature on management fads. As a means to better grasp the complexity of the phenomenon, the concept is then more thoroughly examined using Lillrank’s (1995) categorization of the content of transfer. A final discussion assesses the influence on the implementation by these concept characteristics.

5.1 Lean Enterprise - a fad?

Although lean does not fit neatly into Kieser’s (1997) description of today’s management fashions as short-lived, the concept satisfies most other criteria for being delineated a management fad (2.2.2). However, the question arises as to whether Lean Enterprise, the specific management concept of the case company, could also be classified as a management fad, and if so, to what degree.

Due to the fact that this concept is based on lean, which holds the essential characteristics of a fad, one could argue that also Lean Enterprise is a management fashion. The multinational corporation has developed a concept that meets the individual needs of the enterprise, and has

customized it with the elements that they find most relevant for their business. Lean Enterprise, as described in the corporation's own brochure, has been introduced in order to strengthen the innovative power. The motivation is to improve continuously and ensure high degree of customer satisfaction in the long run, by producing high quality production with low cost - on time. For this reason, it is perceived crucial to eliminate waste, and at the same time be able to add value (Internal document, Lean Enterprise Brochure), which are all general principles that are grounded in lean (cf. 2.4.2).

Whether or not a concept is a fad depends on how persistent the company is in its effort to implement the concept (Pascale, 1990). As emphasized by the corporate manager, the aim is to establish a "permanent foothold" (cf. 5), and the intention is therefore for Lean Enterprise to be permanently applied within the whole organization. The recipient unit has for this reason established a lean leader role and two lean coordinator positions in order to control and assist the implementation and further use of Lean Enterprise. Abrahamson (1996) argue that such fashion-setters are important for management concepts to be defined as fashion, and in this way, by establishing own positions dedicated to the concept, these could be viewed as the organization's own fashion-setters. Furthermore, in order to introduce the employees to the concept of Lean Enterprise at an early stage, they all have to attend a mandatory and standardized introduction course. In addition to a theoretical part, this course includes a practical exercise of building Lego as a means to illustrate the effects of certain improvement efforts. Lean Enterprise consists of a wide-range of different tools and techniques derived from lean, however, only a selection of these has been applied by the recipient unit. These are further described in subsection 5.2.1. Another important characteristic of management fads is that they are presented in enthusiastic ways (cf. 2.2.1). This is also true in the case of Lean Enterprise, which can be illustrated by quoting the corporate manager:

With [Lean Enterprise] we assure our existence today and in the future for the enterprise as well as for our individual jobs. (...) Together we will realize these targets (Corporate manager, Internal document, Lean Enterprise Brochure).

According to literature, the life spans of today's management fads are perceived as short (cf. 2.2.1). Our empirical material from the case company, however, indicates that most of the employees do not consider Lean Enterprise as something entirely new. At the recipient unit, and at the other enterprises in the same industry cluster, they have in fact worked with lean at least

since the late 80s (Field notes, March 2010). In case of the recipient unit, this was initiated due to a demand from an important Swedish customer:

But like I said, what we're doing now is not something new. In 1990/1991 we had a course with a Swede, and what he was working with then is the same as what we're doing today (Interview with maintenance mechanic, October 2012).

In general, the interviews that were carried out in the autumn of 2012 showed that most employees describe the difference between Lean Enterprise and earlier systems as minor or non-existing. Lean Enterprise mainly represents a perseverance of well-known ways of thinking and working. As many as 33 % of the respondents consider the new system merely 'old news' (Status report, March 2013). Statements illustrating these perceptions are numerous:

My impression is that it's pretty much the same. The name just changes from year to year. At least that's the impression we get over here (Interview with operator, October 2012).

There have been several such systems during my time here, but I can't remember the names. I think the systems are more or less the same (Interview with product quality leader, October 2012).

[The new system] is what we are meant to work by now, though I haven't noticed any difference (Interview with operator, October 2012).

"Dear child has many names". Lean Enterprise is just what [the MNC] has chosen to call this standard (Interview with operator, October 2012).

You can talk to the elders in this plant, and they'll tell you that they have been doing this since the 1970s. It's not something new! (Interview with lean coordinator, November 2011).

These are all examples of comments in the same category that Benders and van Veen (2001) also experienced as repeating themselves in their studies; "a particular concept is merely old wine in new bottles" (p. 50). Research has shown that change is often accompanied by undesirable characteristics, such as stress and management–employee distrust (cf. 2.1.4). Other studies have even shown that workers are simply tired of constant change. One of the lean coordinators described how statements by employees in one of the units indicated such tiredness regarding change already at the beginning of the implementation efforts:

To be honest, when talking about Lean Enterprise several of the employees said "Ugh, here comes just another round", because they have seen it before (Interview with lean coordinator, November 2011).

Similar response to the change was observed in several other units as well (Field notes, October 2012). Interviews revealed that, due to repeated change, the attitude of several employees towards the new system was not merely positive:

Under the ownership of the former owner new things came all the time; new ideas and concepts. But it never lasted long (Process technician, October 2012).

To me it just seems like new systems are repeatedly being introduced before the last one is up and running properly. There's generally just too much to relate to (Interview with operator, October 2012).

Quotes like these are strong indicators of employees experiencing 'change fatigue' as defined by Stensaker et al. (2002); too much stimulation has left them more or less disoriented. A consequence of the repeated exposure to new concepts and tools is the operators acting indifferently towards new changes, hence evolvment of the BOHICA effect. According to Connell and Waring (2002), BOHICA, to most employees, involves keeping their heads down low enough in order for the changes to pass them by (cf. 2.1.3). This is consistent with what Stensaker et al. (2002) describe as one of the indicators of the BOHICA effect; namely employees tendency to concentrate on tasks, hence being passive to change. When asked about what they know about Lean Enterprise and suggestions for how to improve the system, such passivity appeared existent:

No, I haven't thought about that at all [chuckles]. We are trying to concentrate on what we are supposed to do, really (Interview with maintenance worker, October 2012).

Consequently, instead of contributing to the development of Lean Enterprise, the statement indicates that some employees would rather prioritize working and focusing on their own specific work tasks. Whether a fad or not, Lean Enterprise has clearly met resistance and difficulties in the faces of implementation.

When attempting to provide a throughout analysis of the organizational change under study, that is, the implementation of Lean Enterprise, gaining an understanding of the concept in itself is a reasonable point of departure. For this reason Lean Enterprise is described in the following section, focusing on the actual content of the transferred concept.

5.2 The content of transfer

A pure transfer of management concepts, especially over cultural, national and industry borders, is hard if not impossible, as ideas will always change when traveling (cf. 2.4.1). The framework provided by Lillrank (1995) categorizes the content of management transfer into three different groups; techniques and tools, organizational vehicles, and management principles. Transfers within these categories differ in context, and thus in the need of abstraction level when transferred. Difficulties in implementation must therefore be understood in terms of each category respectively. The following subsections describe Lean Enterprise with regards to each category, starting with the generic techniques and tools. Finally, the complementarity of the content categories of Lean Enterprise is assessed; examining to which degree the concept has actually been implemented.

5.2.1 Techniques and tools

Lean Enterprise consists of various tools and techniques for implementation in the subsidiaries worldwide. When interviewed, employees were asked about what Lean Enterprise means to them, and how they use the system in their everyday work. In spite of the fact that only a small sample of the available techniques and tools has been applied by the case company, several answered the questions referring merely to a single tool. This is exemplified in the following two quotes:

We've got [figures] that are displayed on the whiteboard, in order for us to achieve goals (Interview with operator, October 2012).

It's about reporting (...) the numbers become the basis for whether the figures are colour red or green (Interview with operator, October 2012).

The operators here describe a whiteboard with target figures on safety, quality and quantity, which are to be coloured with respect to deviations; if requirements are met, these figures are coloured green, and if they are not, a red colour is used. The intention is to daily display the system status and to highlight every deviation. What has clearly been transferred in this case is therefore purely this tool, and such visual control is a common technique of lean (cf. 2.4.2). In addition, daily team meetings are implemented all over the company, and the whiteboard is typically used at these meetings to exchange information between different shifts. The figures

and the team meetings thus constitute examples of generic management techniques and tools of Lillrank's (1995) framework.

Every employee is supposed to attend the team meetings, as an attempt to create more cohesive teams and introduce a higher level of involvement in the units' performance. In spite of statements that Lean Enterprise has made things more structured, many employees consider Lean Enterprise merely extra work. This is especially evident when it comes to the use of the figures:

I don't use the [figures] much. I don't relate to it, and it's easy to forget to colour them. It somewhat feels like double work (Interview with operator, October 2012).

These [figures] don't do us any good. We are measured on the number of finished items, and that's what matters. All the other stuff is just requested by others (Interview with operator, October 2012).

More specifically, operators in various units state that they do not use the figures as it is the leaders' business:

I don't deal with it, as it is the shift leader who's usually filling it out (Interview with operator, October 2012).

I don't use it. The shift leader deals with it, although there's not much focus on it (Interview with operator, October 2012).

No, we are not good at using the whiteboard (...) It is [the team leader] who's using this figure stuff (Operator, October 2013).

Even one of the team leaders stated that operators did not seem to use the information of the white board at any other point during their workday (Field notes, October 2012). He further admitted that the operators do not attend the team meetings. Observations in October 2012 revealed that the team meetings were carried out in a range of different ways in the various units, both with regards to agenda and to the involvement of operators.

The team meetings and the whiteboards have been implemented in most units, but Lean Enterprise does, however, also include other techniques and tools. Among the ones implemented in parts of the case company are 5S and SMED, which are both well-known techniques within lean (cf. 2.4.2). In alignment with the principles of lean thinking (cf. 2.2.2), the corporation's brochure of Lean Enterprise describes 5S and SMED as methods that are used to

eliminate waste. In addition, it is stated that a clean and standardized work area is a by-product of 5S activity, and that it brings about the opportunity for all employees to design their own workplace (Internal document, Lean Enterprise Brochure). Employees that are familiar with this tool value the benefits of using it, as the following quotes illustrate:

Maybe I forgot to mention, but 5S is important with regard to health, environment and safety. If there is a hammer on top of the rags in the cupboard, it is a painful reminder when it hits you in the head. We can't have trucks parked incorrectly or objects laying where the trucks can bump into them (Interview with operator, October 2012).

5S is important. One could sort of say that we use it in here as well. We have loads of drawers and cupboards to place things in, and they are always tidy. It's crucial to us (Interview with quality technician, October 2012).

Order and tidiness is important. We've used 5S for several years (Interview with programmer, October 2012).

I know 5S well. It is, I think, about not spending excessive amount of time on looking for tools. About having fixed places where things can be easily found. And it works well, it does (Interview with operator, October 2012).

Although 5S is also part of the management concept currently implemented, it mainly results from previous ownerships (Field notes, October 2012). Several employees reported that there has been a decline in the usage of the tool since the change in ownership and the implementation of Lean Enterprise:

(...) 5S has been a bit under prioritized. Everyone is responsible for their respective areas now. There are a few zones left from the time of [the previous owner]. It wouldn't hurt to focus on 5S now, because there is no follow-up at all (Interview with operator, October 2012).

We used 5S a lot, but that is all gone. Now we've been told that we haven't got the time to clean any longer (Interview with operator, October 2012).

In spite of previous devotion to the tool, it has recently been neglected and forgotten in most units. The possible consequences of simply removing existing well-functioning practices are later discussed in subsection 7.2.2. Some, however, still use 5S and associate it with previously well-run practices:

We use 5S, which concerns order and tidiness. In that way we preserve the old, what we did earlier (Interview with tool constructor, October 2012).

5S was many years ago, and then it suddenly vanished, and now it's back again. It is nicer with 5S, because we have to stick to the standard on the board (Interview with operator, October 2012).

The following quotes exemplify that the understanding of 5S, however, is somewhat superficial, as some employees exclusively relate it to the weekly cleaning, and do not realize its intention of continuous work:

I must say that we're fairly good at 5S considering what we do here. We clean once a week (Interview with maintenance manager, October 2012).

We don't have 5S schemes, but we know that these things should be done once a week, like cleaning the workshop and keeping things neat (Interview with mechanic, October 2012).

The other tool mentioned above, SMED - single minute exchange of die, is a technique for minimizing the set-up time, and thus reducing the size of production batches (cf. 2.4.2). This is to be done while at the same time guaranteeing the availability of the equipment. SMED has been successfully implemented in one of the production lines, but not yet introduced as a tool to the other units (Field notes, October 2012).

We work with SMED when changing tools. Now this is done pretty fast (Interview with shift leader, October 2012).

We have a SMED-board, a target figure of 23 minutes, and we are continuously working on improving performance in order to meet this target figure (Interview with administrative employee, October 2012).

An operator who had previously stayed at this unit shared the enthusiasm:

I was at the production line when they started with it there, and it was great; something called SMED. (...) It works excellent. Very simple and easy steps that are written down on a card that explains things that must be done, like preparing a rag and such. A checklist that is to be followed slavishly. SMED is one of the best things I've experienced (Interview with operator, October 2012).

Like with 5S, the usage of SMED is primarily a result of change initiatives by the previous owner, and something employees at the given unit relate to:

5S and SMED have become part of our culture. We're used to it. It's been less of it since we became a part of [the MNC] (Interview with process manager, October 2012).

Similarly, when asked whether there were aspects of earlier systems that ought to be included in Lean Enterprise, one of the lean coordinators answered as follows:

Definitely 5S and SMED. They constituted the beam, and should do so (Interview with lean coordinator, October 2012).

Summarized, the observed implemented techniques and tools as part of Lean Enterprise are the whiteboards with the figures, the team meetings, 5S, and SMED. These are, however, implemented with various degree of success in the different units. An important difference between the categories of Lillrank (1995) is the level of abstraction at which they can be successfully transferred. Although pure techniques and tools in theory are considered easy to transfer without considerable loss (cf. 2.4.1), this case has thus proven otherwise.

5.2.2 Organizational vehicles

Tools and techniques will never alone create change (Costello, 2011). While the generic techniques and tools described in the above subsection, focus on practical elements, the next category, organizational vehicles, are structures required for carrying managerial strategies (cf. 2.4.1). In other words, the use of the board, the team meeting, 5S, and SMED is meant to ensure the intended performance of the organizational vehicles. The aim of this subsection is therefore to uncover what the purpose of the applying the different tools really is; hence analysing the organizational vehicles.

The case introduction shows that one problem with the implementation has been the somewhat negative reception of the concept by the employees (cf. 1.2). Even at the beginning of implementing Lean Enterprise a particular unit, operators did not express much enthusiasm:

Can't you [the leaders] just attend the meeting, and then do a briefing with the rest of us afterwards? (Operator, May 2013).

This question was raised as the employees in the unit were encouraged to attend an initial meeting where one of the lean coordinators was to explain the use of the figures. The request strongly indicates that the operator knew that she would be informed at some point later, either by the mid-level managers or the other participants. Although the team meetings in some units seem to serve as good arenas for information sharing and involvement (Field notes, October 2012), the above quote implies that formalized team meetings do not necessarily meet some

needs on the shop floor of all units. Consequently, standardization and structured means of facilitating involvement are not perceived as suitable or necessary vehicles of improvement. Despite this, standardization in the form of organizing the workplace in standardized ways by applying 5S has, as the analysis show (cf. 5.2.1), been perceived as quite beneficial by some employees. Standardization is a fundamental part of lean in general (cf. 2.2.2). Nonetheless, subsection 5.2.1 indicates that the case company has not made the best possible use of 5S due to sporadic encouragement.

Another tool described in subsection 5.2.1 was the whiteboard with figures, which was further identified as tools of visual control. The intention is to display the system status and highlight deviations, in line with what Womack and Jones (1996) argue in favour of visualization; to be able understand the system performance at a glance (cf. 2.4.2). In the corporation's own Lean Enterprise brochure, this is referred to as visual management. For this reason, visual management is another identified organizational vehicle within Lean Enterprise.

Moreover, one of the departments has successfully implemented the tool SMED at the production line by working for years with different continuous improvement efforts (cf. 5.2.1). In this regard, one could speak of developing and sustaining an organization that handles short cycle times as another organizational vehicle, which is also an organizational vehicle of lean in general (cf. 2.4.2). Although SMED is a part of the tools inherent in Lean Enterprise, this success, however, should primarily be credited the initiatives of lean by the previous owner several years ago (cf. 5.2.1).

The organizational vehicles of Lean Enterprise can thus be summarized as follows; visual management, involvement, standardization, and an organization handling short cycle times. These are meant to serve as structures that are required for carrying the managerial strategies, and thus for the company to successfully change. The next phase of the analysis, and the topic of the following, and final, content category, is therefore the management principles.

5.2.3 Management principles

The core idea of lean is to avoid waste and add value (cf. 2.2.2), and in line with lean in general (cf. 2.4.2), the corporation keeps to the principle of continuous improvement and efficiency to do so. These can thus both be recognized as the management principles of Lean Enterprise. One

of the main drivers is that today's automobile industry suffers from low margins and value chains that are not able to evolve with customer desires (Holweg & Pil, 2005). Due to a highly competitive market, and the constant development in terms of technology, continuous improvement is a necessity in the automobile industry. The brochure on Lean Enterprise does in fact describe the concept as a continuous improvement process. In this way, working smarter each day becomes the primary means to compete with others in the market. According to a mid-level manager at the case company, the latter is common knowledge among employees (Field notes, October 2013).

What [Lean Enterprise] could contribute to, is (...) doing things more efficient both with regard to costs and time. In my opinion, continuous improvement is something we should be pounded with more often, something I feel [Lean Enterprise] should contribute to (Interview with administrative employee, October 2012).

This quote reveals that the employee has failed to recognize the link between Lean Enterprise and continuous improvements. What he has understood, however, is that Lean Enterprise is a system that strives for increased efficiency. Timmermans and Epstein (2010) argue that efficiency is often the objective for developing such standards. When asked about the differences and similarities between Lean Enterprise and previous systems, several employees also recognized this focus:

Lean Enterprise concerns more about the issue of efficiency, I suppose (Interview with maintenance mechanic, October 2012).

This too becomes a form of lean, by making things in the system efficient (Interview with administrative employee, October 2012).

Lean Enterprise is about a general way of working; working more efficiently. It is hard to define definite Lean Enterprise projects in the daily work. The Lean Enterprise thing is more unspecified, more general, and in a wider perspective (Interview with tool constructor, October 2012).

Although the need for efficiency seems to be understood by the above quoted employees, the latter quote also indicates that not everybody have gained a clear understanding of the concept, The empirical findings actually indicate that many employees associate Lean Enterprise with merely the introduction course that is carried out by the lean leader (Field notes, October 2012). Unfortunately, this association is not always a good one, as many employees are left with the

perception that the system does not concern them, and the course is simply referred to as the “Lego course”:

I went to a course. The Lego course (Interview with operator, October 2012).

Oh, that's [Lean Enterprise]? I also attended the Lego course (Interview with apprentice, October 2012).

Even one shift leader stated that he did not get much out of the course (Interview with shift leader, October, 2012). Even though a few respondents explained that they understood the main focus of the course to be on efficiency, like the shift leader they did not understand that Lean Enterprise is a system that is meant to affect all employees, and to be used regardless of unit and level:

It [the introduction course] concerned Lego principles for mass production, so I didn't find it relevant for us (Interview with toolmaker, October 2012).

No, it's not related to what we do here, since it's based on production line technologies. This here [referring to his unit] is process, which implies a totally different way of production (Interview with operator, October 2012).

The management principles of Lean Enterprise are thus related to both efficiency and continuous improvements. These are both principles that employees fundamentally agree with. The problem, however, lies in them not recognizing the link between Lean Enterprise and continuous improvement, let alone that the system is to increase efficiency at all parts of the company.

5.2.4 Category complementarity

It is thus found that the most frequently used techniques and tools are implemented, although not yet internalized in all units; team meetings are being held and the figures filled out, but these practices have not been “infused with meaning” in the sense that Kostova (1999) describes (cf. 2.5). In this way, the employees do not seem to recognize the underlying intentions of the management concept. They rather perceive Lean Enterprise as a set of tools that do not necessarily fit with their practices or as just a course in building Lego. Modig and Åhlström (2012) argue that many organizations begin their lean journey in this way; by implementing well-known methods and tools, which again could lead to employees missing out on the deeper layers of what the change effort really entails. As was emphasized by Lillrank (1995), the

categories of management transfer are complimentary. In this case particularly, this means that the tools are of no use unless the employees understand and agree with the corporation's efforts to create a better sharing of information and involvement through formalized and standardized means of communication. What this analysis shows is that the physical use of given tools that come with a concept does not necessarily imply a successful implementation. Even more so, when employees fail to achieve an understanding of the underlying ideas of Lean Enterprise, the tools and techniques are perceived as unnecessary. This is in line with Lillrank's (1995) argument, that techniques and tools are of little use if the other categories of managerial content are not understood by all employees that are influenced by the implementation. Although techniques and tools, in theory, could transfer easily without loss, the analysis has thus shown that this is not always the case. This confirms the other statement by Lillrank's (1995); that managerial principles, organizational vehicles, and generic tools are complementary categories, and need to be approached in that way.

5.3 Concluding comments

This chapter has shown that, on the one hand, Lean Enterprise could be considered a fad for several reasons: Firstly, it is based on lean, a concept which in itself is a management fad. Secondly, management is persistent in its effort to implement the concept. Thirdly, the concept is presented in enthusiastic ways, and there are established clear fashion setting roles, including the lean leader and the coordinators. On the other hand, the concept does not fulfil the criterion of having a short life span. Lean Enterprise is, on the contrary, rather perceived as a new version of an old and well-known concept, and it could therefore not be considered as merely a passing fad or fashion. This has resulted in the somewhat unfortunate combination of employees experiencing the implementation as yet another management idea, while at the same time experiencing change fatigue. This combination has clearly had a negative impact on the implementation effort.

Using Lillrank's (1995) framework, Lean Enterprise can be categorized in the following way: The identified generic techniques and tools are 5S, SMED, the whiteboard with figures, and team meetings. The organizational vehicles are visual management, involvement, standardization, and an organization handling short cycle times, and the management principles of Lean Enterprise are mainly identified as efficiency and continuous improvements. These should be

treated as complementary. It appears evident that the Lean Enterprise implementation efforts to some extent lack the necessary focus on this relation between the three categories, as there has been a strong focus on implementing the tools and not to make the employees fully understand why this is done. What the employees, however, recognize as Lean Enterprise is merely the tools and techniques, which again are perceived by many as not suitable for their work situation. Nonetheless, they actually seem to agree with the underlying management principles of the concept, but they do not realize that these principles actually are a fundamental part of this system. Physically using given tools does not necessarily imply a successful implementation, as the idea behind them must be understood by the employees using them, hence be “infused with meaning”. Consequently, despite the tools being implemented, they are of little use if the other categories of content are not understood by all the employees. In order to succeed with the implementation of Lean Enterprise it is therefore important to take into account all the three categories of content simultaneously.

Chapter 6:

THE CHANGE STRATEGY

As the research question seeks to investigate the transfer of the management concept from the corporate Central-European headquarters to the Norwegian subsidiary, not only is the content of transfer important, but also how this transfer is conducted. The literature review explained that the choice of change strategy, strategy O or E, strongly influences the change outcome (cf. 2.1.2), and difficulties in implementation of the management concept must thus be understood by examining the way the concept is implemented. Therefore, this section will assess the chosen strategy of the implementation of Lean Enterprise within the multinational corporation, as well as the impact this has had on the outcome of the implementation; hence answering the subordinate research question 2.

6.1 Choice of change strategy

In order to examine the choice of change strategy, one should first be able to understand the underlying and initial drivers of the change effort. In accordance with Van de Ven and Poole's (1995) framework, the initial drivers for developing Lean Enterprise are rooted in life cycle theory, as the corporation must be able to adjust to its organic growth. For this reason, change effort follows a prefigured program with a linear progression. The global automotive market is characterized as a market suffering from low margins (Holweg & Pil, 2005), and the high degree of competition and increased demand for productivity is thus also assumed to have affected the MNC's change initiative. This is in line with change as evolution, where global competitiveness and commercialism are the main generating drivers for change (Van de Ven & Poole, 1995). It is therefore not a coincidence that the case company, like many other enterprises, has developed its own systems based on lean, as this is one of the best-known concepts for improvements within the automobile industry (cf. 2.2.2). Due to such institutional pressures, organizations become increasingly similar (DiMaggio & Powell, 1983), hence Lean Enterprise could be perceived as a result of isomorphic changes.

However, regardless the initial drivers for the development of the concept at the headquarters, the change process for the case company should be examined on enterprise level. The corporate management of the MNC has not made the implementation of Lean Enterprise an option to their companies worldwide, but rather a demand (cf. 5). As explained in chapter 5, Lean Enterprise includes several distinct and standardized techniques and tools that all companies are meant to incorporate as part of the system. The implementation is further attempted to be carried out by following a formal and sequential plan, introducing the concept to one unit at a time. Due to this pre-developed and fixed management concept, this resembles what Kerber and Buono (2010) characterizes as a planned change approach. Planned changes, like this, could be seen in light of Huy's (2001) theory which differentiates with respect to the content of change. Due to the immense focus on the Lean Enterprise tools in the faces of implementation (cf. 5.3), the tangibility of the introduced content is high. As the objective with the implementation is to design work systems in order to achieve efficient work processes, the change effort thus has certain similarities with Huy's (2001) engineering intervention approach. These are all characteristics representing the strategy E approach (cf. 5.2.1) to change, where a top-down leadership is prevailing.

According to the Norwegian plant management, experiences of top-down leadership have been more noticeable in general since the change in ownership (Field notes, November 2011). This perception further coincides with the implementation of Lean Enterprise:

[The MNC] had their basis, which was forced down on us (Interview with unit leader, October 2012).

It might be wrong of me to say this, but they [the headquarters] are forcing things down at us (Mid-level manager, October 2013).

These perceptions by local managers were, among others, examples of a prevailing understanding that the concept has been forced down on them, that is, from the external headquarters to this recipient unit. Nadler (1993) argues that the formal positioning power gained by following such top-down strategy is useful for managers to be able to force changes. According to one of the lean coordinators, who daily works with the operators, the corporate management provided strong guidelines for what the management concept should be like:

Lean Enterprise shall be like this and that (Interview with lean coordinator, November 2011).

Despite, or even due to, the MNC being large and immensely wide-spread, top management has created a concept that is meant to encompass the whole corporation, and as argued (cf. 5) this concept comes with a relatively high degree of standardization. This contradicts with Crozier's (1969) statement of concepts having to be simplified, and thus might impede the possibility of customizing Lean Enterprise with respect to the different locations and types of production processes. As a result of the management concept being forced down from the corporate headquarters, conflicts between the new system and the current practices has become emergent. One of the problems concerns the employees' struggle to recognize the connection between Lean Enterprise and their everyday working life. Statements like "it does not fit here" or "it is more suited for other units" (cf. 1.2) indicate a scarcity of discussions where operators are involved in establishing an understanding of the concept, and even more importantly how it is relevant for the particular units. Not only are the tools perceived as too standardized (5.2.1), as this is also the case regarding the introduction course. This has been carried out in the same manner every time, regardless of the participants' background and knowledge, and without a prominent focus on the practical impact on the operators own work situation. The lack of collective reflection on the practical impact of Lean Enterprise seems to have resulted in a gap between the concept initiators, the corporate management, and the final users at the recipient unit. When change is not perceived as a natural part of the everyday processes, there is a risk of reluctance to change to it (Jacobsen, 2012). Thus, since the tools are perceived as imposed and not beneficial for their purposes, the attention on Lean Enterprise would most likely fade over time, as commented by one of the operators:

It must be a part of the day-to-day practice, if not it will let slide (Interview with operator, October 2012).

Although Lean Enterprise opens for certain adjustments, such as selection of the objects to be measured and illustrated on the whiteboard, this is not emphasized to a high degree by management (Field notes, May, 2013), and therefore not done in all units. As the statement above implies, the concept is in risk of not being fully incorporated with the current practices in the long term. The lack of tailor made solutions might further contribute to the previous discussed issue of employees seeing Lean Enterprise as additional work (cf. 5.2.1), and not as

something that benefits each and every operator in making their work situation to the better in the future. Thus, the perception of things being forced down has not only been present on the management level at the recipient unit, but also on operative level. The lean leader holds a role that is situated more or less in between the production units and the plan management in the organizational structure, and his actions and directions are seen to have a significant impact on how employees at operative level perceives the change efforts coming from the management. The introduction of the new team meeting format was no exception. In one department, the team meeting was observed to not follow the pre-set meeting agenda, as the issues were brought up randomly (Field notes, October, 2013). The team leader, who was in charge of the meeting, further explained when asked about the agenda posted on the whiteboard:

It is not used, it is only hanging there. (...) [The lean leader] also posted a couple of other things on the whiteboard, but I got permission to remove it (Team leader, October 2013).

This statement illustrates that, from the team leaders point of view, the tool did not fit their practices, as the unit had already developed a well-functioning way of arranging daily meetings. In spite of this, the pre-set agenda was introduced, without the lean leader enquiring information from the team leader and the operators about the relevance of the document, nor trying to make adjustments according their opinions. The lean leader's strong position was also emphasized by one of the lean coordinators, referring to him as the "Lean Enterprise king" (November, 2011). When implementing 5S (cf. 5.2.1), the fact that he made decisions on behalf of the operators probably created harm than help:

We have asked for more training and time to work with 5S, it has much to do with the well-being...We haven't seen [the lean leader] in many years, since he came and threw things away (Interview with operator, October 2012).

We had the one-day course in production were all my stuff were thrown away (Interview with operator, October 2012).

5S is a tool for organizing the workspace, and as previously explained (cf. 2.4.2) one of the main approaches is to remove unnecessary items to facilitate production. In this case, what looked like excessive and unused production tools in the eyes of the lean leader were thrown away without hesitation. Not involving, but in fact ignoring, the operators' inputs leads to them missing necessary equipment, as the decision-makers lacked full insight to the shop floor practices. Instead of 5S making the work easier for the operators, it rather ended up with

creating more obstacles. Even a long time after the incident, these quotes show that the operators still have the lean leader's actions fresh in their minds. Levin et al. (2012) state that if the technical focus in lean surpasses of the focus on the social and organizational aspects, there is a risk of ignoring the potential of the human aspects of the organization. In this case, to facilitate commitment and to legitimate the implementation of the change, operative decisions regarding local adjustments should rather have been made on the local level, in alignment with the recommendations of Conger (2000). Despite the lean leader's choice of approach, such local adjustments were, however, encouraged by a team leader in another unit, as he gave some operators free reins when organizing the workplace:

I have been given a "free role" by the team leader so that I can do whatever I want (...) I make racks where we can hang the brooms, and organize in order to have the washing equipment easily accessible (...) We are encouraged to come up with suggestions, I think (Interview with operator, October 2012).

Although this is an example of an enthusiastic team leader giving some operators free scope of action, the incident with the dumping of the necessary tools shows that workers with expertise at other units are not necessarily being consulted.

6.2 Impact of the chosen change strategy

Management concepts are initiated and planned by managers, and implementations therefore tend to follow a top-down strategy, which is also the case in this company. This is done, however, with different degrees of employee involvement (cf. 2.3.1). In this section, the change strategy is analysed with respect to its impact on the implementation efforts, starting with the degree of involvement. Further, the management's role, the hierarchical levels, and the implementation in the long-term perspective are discussed.

6.2.1 Degree of involvement

The literature review indicates that there are some contradictions found between lean and employee participation (cf. 2.2.2). One of the reasons is the assumed incompatibility between the focus on standardization and the workers' discretion (Berggren, 1993). Similarly, involvement of employees in decision-making is not the main essence within such a chosen top-down strategy, in contrast with the bottom-up approach (cf. 2.1.3). When asked about the

challenges of the implementation of Lean Enterprise, the plant manager commented that the main issue concerned how to create more involvement (Interview with the Plant manager, November 2011). Working towards an increased worker involvement was thus seen by the plant manager as a key challenge of the implementation, a perception that was also supported by a lean coordinator:

To get to a process where change efforts happen from below... Yes, when it comes to this we have a job to do (Interview with lean coordinator, November 2011).

Such a participative process, where change initiatives emerge from the workers themselves through a bottom-up perspective, is in line with the strategy O approach to change, and not the top-down based strategy E identified in this implementation effort (cf. 6.1). One of the administrative employees further stated that the MNC's hierarchical structure, with a long hierarchical distance from the plant to the headquarters, had made it complicated to participate in the decision-making:

We are trying to tell them when we're not happy (...) But it's not very easy as it is a long way to the top. First, we have to organize here locally with [the plant manager] at the top, and then it must fit with the plans of the corporate management's (Interview with administrative worker, October 2012).

Moreover, another employee felt treated with disrespect as inputs were not taken seriously by the management:

I feel that they [the management] don't listen to us anyway (Interview with Operator, October 2012).

The feeling of not being heard indicates a low degree of worker influence on the change process. According to Kerber and Buono (2010), such limited worker participation would be impediments to success in the change effort. A possible consequence of standardization efforts' aim to obtain a coordinative function, is the limitation of the individuals' freedom (Botzem & Dobusch, 2012). However, this is not in line with the view of some researchers on lean, for instance Levin et al. (2012), who specifically argue that the Lean Production concept should imply going from top-down management to self-managed teams. This means that the local management should emphasize including all employees in the implementation of Lean Enterprise, so that full ownership to changes and improvements could be achieved. Such involvement is in fact one of Levin et al.'s (2012) main arguments. Consequently, it may be a

possibility that it is not actually the content of the transfer, the management concept itself, people react upon, but rather the way the change process is conducted:

People have worked here for a long period time; you can't just palm something off on people (Interview with operator, October 2012).

The statement shows that the operator feels like the tools are just being forced down, without consulting them in advance, despite the fact that they have years of experience in production. Jacobsen and Thorsvik (2002) confirm that in today's complex organizations employees in different hierarchical levels are inclined to react to the implementation method and not necessarily to the management concept itself. As discussed in the previous section (cf. 6.1), several employees on management level felt that the system had been forced down on them. Quotes like the one above confirm that the dissatisfaction with the way Lean Enterprise has been launched is present by operative employees. Schneider, Brief, and Guzzo (1996) state that the probability of a change effort becoming integrated in the organization increases as employees are being involved in the decisions on how changes are achieved. This is important, particularly with respect to the operators, as forced concepts could be perceived as interfering with their long experience and knowledge of their own work.

As described in the literature review (cf. 2.1.3), several researchers have emphasized that it is not possible for the top management to control all power in the organization and to force the change strategy, making the assumption of concentrated power in top-down strategy problematic (Crozier, 1969; Jacobsen & Thorsvik, 2002). As a result, gaining support of the different interest groups is an important factor for succeeding with the top-down implementation (Sabatier, 1986). At the case company, one of the most powerful actors is the trade union, and already during the mid-20th Century, the union began the collaboration with the plant management. Today, most of the blue-collar workers at the factory are unionized. The union is formally represented at the board of directors, and it has had great influence on behalf of the workers in decision-making processes, both regarding important and less-important settlements (Field notes, February 2013). Consequently, what Toulmin and Gustavsen (1996) define as 'broad participation', has traditionally been present. In Europe, co-determination through trade unions at enterprise level is challenged due to the emerging knowledge-based economy (Levin et al., 2012). However, the trade union at the case company is traditionally said, by one of the team leaders, to want the corporation to succeed by playing a proactive role and contribute to

the understanding of continuous improvement efforts (Field notes, November 2011). Another team leader confirmed this:

The trade union is engaged in lean and Lean Enterprise in a positive way (Interview with team leader, November 2011).

Similarly, during a conversation with two mid-level managers in the autumn of 2013, the following statement was made with regard to the whiteboard tool with the figures, and confirmed by the other mid-level manager:

[The trade union] has certainly been consulted in advance (Mid-level manager, October 2013).

Yes, one cannot simply come and throw some stickers on the wall (Mid-level manager, October 2013).

The above analysis has shown that the employees as individuals are not involved in the implementation to a substantial degree. In spite of the management's perception that the trade union, representing the employees, to some degree is engaged in the management concept at enterprise level, it has no distinct influence on the corporate level. As the management concept is developed at the corporate headquarters, this becomes, however, outside the trade union's range of influence.

6.2.2 The management's role

It is not only the operators who have failed in developing an ownership of the new management concept. The plant manager admits that they, at the recipient unit, have not been entirely supportive of the change effort:

We do not totally agree with all that Lean Enterprise entails (Interview with plant manager, November 2011).

Management, as part of the transfer coalition, is a key in understanding and interpreting a given practice (cf. 2.5.1), but more specifically, management support is also a key variable in implementation of management concepts such as lean (e.g. Worley & Doolen, 2006). When not even the plant management agrees with the imposed concept from the corporate management, it is not likely that the rest of the organization will be more supportive. An employee stressed this importance, arguing that someone needs to be in charge of gaining support from all

subordinates:

Some should be the prime movers here. Now it has come to a stop, and it creates frustration (Interview with operator, October 2012).

The operator thus indicates that there is a lack of enthusiasts, which do not only lead to the workers being indifferent about the issue, but it is actually also a source of frustration. In top-down implementations in particular, Jacobsen (2012) argue that management is the driving force of the change effort, making support from the whole management a prerequisite for success. In this case, however, it seems like the plant management to some extent is being a passive recipient of the concept coming from the headquarters abroad. As the plant management is not fully committed to the changes coming from above, it is assumed to widen the gap between the initial ability of a successful top-down implementation and the actual practice. One of the mid-level managers even stated that the outcome of the change effort had much to do with the efforts of top management (Field notes, November 2011). The need for more visible and hands-on management was also brought up by some of the administrative workers:

My suggestion is that management must take more responsibility (...). We need a more visible management (...) It needs to be emphasized (Interview with administrative worker, October 2012).

In order for it to be a full implementation, the management needs to be clearer (Interview with administrative worker, October 2012).

Due to the poor visible management and the fact that operators consider the techniques and tools as additional work (cf. 5.2.1), the scarce encouragement by management could also add to the perception of Lean Enterprise being a side-project:

I think they [management] might consider it as a side-project, but the point of lean is to change how people work (Interview with administrative worker, October 2012).

A problem with lack of integration with everyday practices is that it could affect the intended objectives the organizations are pursuing, as the change efforts could end up being disruptive to the other aspects on the management agenda (Abrahamson, 2000). Perhaps even more importantly, as the values and behaviours of the managers are strongly connected to worker behaviour (Buchko, 2007), the lack of commitment among the plant management will most likely have a negative impact on the perception of Lean Enterprise in the rest of the organization. This

may be harmful to the company in the long-term run, since, according to Sabatier (1986), the degree of commitment among the implementing actors is highly influencing the outcome of the change effort. In an interview with one of the lean coordinators nearly two years after the acquisition by the MNC, he admitted that some of the operators did not yet understand what Lean Enterprise meant in practice (Interview, lean coordinator, November 2011). The same issue was brought up for discussion by a unit leader yet another two years later (Field notes, October 2013). This indicates that the issue of insufficient communication between the hierarchical levels on how the changes are contributing to improvements is a recurring one.

Poor communication of the underlying principles of the concept, together with the system being forced down by management (cf. 6.1), could also lead to other unfavourable effects. One solid example is found in the perception among employees of the new objects of measurement that are to be illustrated with respect to deviations. According to Klev and Levin (2012), measurements tend to be perceived as a control to evaluate performance. Consequently, instead of the whiteboards with the figures (cf. 5.2.1) being a tool for empowerment and continuous improvement, there is a risk for the tools to be partly reduced to pure control mechanisms. When colouring the figure indicating the first displayed deviation, a unit leader could probably sense a frustration of one of the operators:

[Operator], you mustn't let this red line cause you a heart attack (Unit manager, July 2013).

As response to this comment the operator emphasized that she was not to be blamed for the change in schedule:

I've just been concentrating on my work; it has been so much to do. It's not my fault, for sure (Operator, July 2013).

By defending themselves when deviations are displayed in this manner, the operators act as if Lean Enterprise, with its standards, is being forced upon them as a means of control by the management. This is in line with what Brunsson and Jacobsson (2000) argue; that standards can be perceived as “instruments of control” (p. 1). Moreover, when first beginning to use the tool in this particular unit, a mid-level manager argued that the figure representing “delivery” should be coloured green as long as delivery was in accordance with the new and revised production schedule of the day, rather than the original one (Field notes, October 2013). He

probably did not want red marks, as it would make it look like they had failed to deliver. This being the attitude of a manager might add to the operators' perception of the tool being a pure control mechanism. As a consequence, the perception of being blamed for defects could impair the worker commitment (Angelis et al., 2011). Another operator later explained why displaying deviations in this way was perceived as unfair:

It is not right that we're having a deviation because they [the nearest upstream unit in the value chain] have spent too much time (Operator, October 2013).

In the translation process it is not only the pure techniques that are translated, but that also the meaning and values are changed (cf. 2.5.3). Thus, instead of being a vehicle for increased involvement and responsibility through the increased visibility, it becomes a control mechanism seen from the operators' point of view, in line with what Levin et al. (2012) argue is a likely consequence. One way to explain this is that there is an inherent assumption in Lean Enterprise of lack of involvement at operative level: The concept assumes that operators are not aware of their performance level, and the introduction of green and red lines will increase the knowledge. This is, however, not compatible with the general practices at all the units of the case company. In some of the analysed units, messages are delivered in an informal manner and more or less spontaneously during day-to-day conversation. What is more, due to a positive and cohesive work environment, the employees help each other out without hesitating (Field notes, October 2013). Formal means of communication are thus not considered necessary. When the first red line was coloured, in the situation recently described, the operator was fully aware of the fact that this had happened, and she had already taken action to correct. To the operator, the purpose of the red line was just a control issue, as it did not help her, but was rather interfering in doing her job.

When it comes to management concepts like lean, Liker (2003) argues that clear communication of the intended changes is essential in the implementation. By having an uncertainty related to Lean Enterprise among the operators, both to what is to be done and why, the managers have clearly not managed to communicate the intentions of the changes. This could also be explanation for why the system is being perceived as control mechanisms. In other words, the case company has not succeeded with what Lewin (1947) conceptualizes as the unfreezing phase, as there is no common understanding that the change effort is right and why the operators should bother with using the new tools. Creating a readiness to change is

management's responsibility, and if this is not achieved, such resistance or passivity are probable consequences (Lewin, 1947). However, what is especially problematic is that the perception of maladaptation seems to be a rule rather than an exception at the plant, as employees in several units feel that the concept is unsuited for their work (Field notes, October, 2012).

6.2.3 Hierarchical levels

The previous findings in the analysis indicate that there have been prevailing differences between the hierarchical levels. The whiteboards and figures being perceived as control mechanisms, as discussed above, indicate that ambiguous interpretations of Lean Enterprise have emerged within the MNC. This was clearly not the intention by the corporate management. In fact, such ambiguous strategy interpretation among different organization members is seen by Jacobsen and Thorsvik (2002) as a common problem with top-down implementation. Already when establishing the lean coordinator role, a disagreement between actors on different hierarchical levels emerged: The lean leader claimed that the new lean coordinator needed to have a degree in engineering. A team leader, however, asserted that this was unreasonable, as they wanted an improvement coordinator with an operative background (Field notes, November 2011). This was supported by an operator, claiming that a lean coordinator with shop floor experience would understand what actually happens in the production (Field notes, October, 2012). It was also in line with another lean coordinators experience, who stressed that the operators would not let themselves be dictated:

I cannot come to the operators and say that this is the way it should be. They are rather bringing me proposals (Interview with lean coordinator, November 2011).

Another example of ambiguous perceptions was found in the understanding of the Lean Enterprise implementation success. As previously stated, the operators claimed that the tools were the team leaders' responsibility (cf. 5.2.1). This was also supported by the team leader himself when asked if they used the figures on the whiteboards:

No, they do not use them (Team leader, October 2013).

On the contrary, the mid-level manager of the unit had another perception:

No... Yes, the operators are involved (Mid-level manager, October 2013).

Despite the initiating hesitation, the mid-level manager finally came to the conclusion that the operators used the whiteboard. Thus, the operators' and the mid-level manager's perception regarding the use of the tool differ substantially. When asked about what happens with the coloured Lean Enterprise figures, the mid-level manager responded that he took them down, and did nothing further (Field notes, October, 2013). The figures are thus not being used according to the requirements, and are even to some point being neglected. The mid-level management was the main driving force of this practice, leading to the results from the assessments only remaining internally within the mid-level managers. In other words, no data was reported further up to the plant management, and in this specific unit, the figure sheets were actually stored in a pile at the mid-level manager's office (Field noted, October 2013). This is an example of new techniques being considered as additional paper-work rather than as support in the daily routines, which is in line with what Klev and Levin (2012) argue; that top-down measurements leads to strategies to avoid the measurements or making the results look better than they actually are.

With respect to the latter, already when establishing the measurements the local management wanted to adjust the definitions to make the results as uplifting as possible. When, in one unit, defining how to distinguish between what was a deviation and what is not, perceptions were clearly ambiguous: The mid-level manager argued, as presented in the above subsection (cf. 6.2.2), that the figure representing "delivery" was to be coloured green as long as they were delivering in accordance with the new, revised production schedule, hence with an on-time-delivery focus. The unit leader, however, stated that all deviation ought to be based on the initial production schedule. A red mark would then indicate a change in the original plan, regardless the cause of the change and the employees' capability of handling it (Field notes, May 2013). Several months after the use of the figures was established, the team leader continued to colour them according to deviation from the adjusted production plan, and not the initial plan like the unit leader suggested (Field notes, October 2013). The resulting consequence was that few deviations were actually marked on the whiteboard, as they normally managed to deliver on-time with respect to the daily revised plan. This leads the measurement outcome diverging from the intention from the headquarters, and was due to the ambiguous perceptions between the hierarchical levels. It can thus be argued that such ambiguousness in perceptions among managers can add to the confusion among operators as to what Lean Enterprise really entails. Besides, the mid-level managers also claimed that there was another aspect of the tool neither

functioning as intended:

We haven't really found a good way to measure "productivity". It is just coloured green (...). We admit to not using it as intended (Mid-level manager, October 2013).

In spite of the known misfit with the practices and the intentions, the figure was continued to be coloured, although nothing actually was measured. Even though being fully aware of this superfluous practice, the mid-level manager was passively supporting it by not taking actions. Considering Klev and Levin's (2012) theory of making results the most promising, constantly marking "productivity" green could serve as compensation in the overall picture for the deviations derived from the other categories. Besides, the reliability of the information provided from the tools was also an issue in another unit:

The information on the whiteboards needs to be true, which they are not always. When reporting to someone far away, it is easy to "juggle the numbers". It doesn't look right if all parameters are marked as green at the same time as we are losing money (Interview with technician, October 2012).

As top-down strategy assumes rationality, the top management have to rely on the employees to actually carry out the actions as intended (Jacobsen & Thorsvik, 2002). However, these examples are indications of the problem of tools not being followed-up as intended by all managers in different units. As the degree of skilful implementation actors influences the final result (Sabatier, 1986), such actions deviating from the initial ideas are assumed to have a negative influence on the implementation outcome.

6.2.4 Long-term perspective

In the same way that management is a key factor in the initial phases of implementation, great emphasis must also be put into the following stages in order to maintain the change sustainability over time. This is especially important when having a top-down approach to change, as Klev and Levin (2012) argue that it might lead to people being passive and disconnected with poor personal responsibility of the further development. When being asked about the selection of figures illustrating the targeted objects of measurement, one mid-level manager responded:

This is decided by Lean Enterprise (Mid-level manager, October 2013).

In this case, the mid-level manager was talking about Lean Enterprise almost like a set package of compulsory tools and principles, rather than a management concept in which he could influence, and consequently disclaim his liability. In order to encourage ownership at the operative level, it is recommended that mid-level managers should be involved in translating the overall objectives into local solutions (Conger, 2000). This was not observed to be done in this particular unit (Filed notes, May 2013). Conger (2000) further emphasizes that, although a change strategy is named top-down, it do not exclude involvement from the rest of the organization, as success depends on the ability of all hierarchical levels to implement the concept. The history at the plant actually showed that success was possible through clear focus by management:

When implementing 5S, everyone was super-sceptical and made fun of the concept, but after half a year it was implemented because it was strongly emphasized. And it gave a clear result on the production as well (Interview with operator, October 2012).

In other words, successful change efforts have been achieved earlier through constant follow-up actions by the managers. Such continuous follow-up actions, rather than only partly efforts, were also seen as important by employees for succeeding with Lean Enterprise:

We are supposed to emphasize Lean Enterprise continuously, and not two-three days of intensive work, and then it is four years to the next time (Interview with administrative worker, October 2012).

We were supposed to do more, but now it's been two years and we're still waiting for more information (Interview with Operator, October 2012).

A lot of new stuff is being forced down at people (...) and then they fall off (Interview with Administrative worker, October 2012).

The statements from the workers illustrate that the current follow-up actions from the management are considered poor and insufficient. To succeed, managers have to take the responsibility for creating the desired outcome of implementation of change, but also for sustaining the effects of the change (Kerber & Buono, 2010). Consequently, it is reasonable to believe that the lack of presence and scarce follow-up actions from the management are strongly contributing to the unsuccessful outcome at this case company. Klev and Levin (2012) suggest that change is not just about creating solutions to concrete challenges, but also to develop the organization's capacity and competence to deal with future development. This seems not to have been a prominent focus at the case company, as the overall focus has been

on the physical implementation of techniques and tools (cf. 5.3), as perhaps perceived expected by the headquarters, rather than comprehending the underlying meaning and principles.

6.3 Concluding comments

Based on Beer and Nohria's (2000b) framework of strategies of change, the findings of this chapter indicate that the implementation of Lean Enterprise has mainly followed strategy E; hence a top-down approach to change. The implementation of the system was a clear demand by the corporate management, and it has followed a formal and sequential plan. However, elements from strategy O and the bottom-up leadership approach has traditionally been the most prevailing within the case company. This is due to the strong influence by the trade union at enterprise level and the fact that the employees are used to being involved in decision-making. The tension between the current applied strategy and traditions at the company thus creates a misfit which could give rise to difficulties.

The top-down leadership approach of strategy E could be an effective means when aiming for decisive changes. The analysis, however, clearly shows that the case company has faced difficulties, as the underlying theoretical assumptions of top-down change are not in alignment with the actual practice; essential precautions when using a top-down approach have thus not been taken. Theoretically, when choosing a top-down approach to change, the implementation phase becomes the key factor for success for the MNC: New solutions are supposed to be made through a certain degree of customization of a management concept, making the implementation process essential in order to put the changes into effect. This implies training people so that they can perform their work in accordance with the new plans, hence the implementation process should address the practical impact to the workers. A top-down leadership further means that managers function as change agents with an enhanced responsibility of the outcome. First of all, local adjustments at operative should be encouraged in order to create ownership to the change among all employees. Secondly, follow-up actions must be carried out to ensure change sustainability. The analysis indicates that such management commitment and actions have been scarce, and might also be harmful due to disruptive actions from mid-level managers. Similarly, ambiguous perceptions of what the change effort entails at different hierarchical levels have also complicated the implementation. These are thus factors that have strongly affected the outcome in negative ways.

Chapter 7:

TRANSFER WITHIN AN MNC – CONTEXT IMPORTANCE

Chapter 5 addressed the transfer of management practices across borders, analysing the importance of the content and nature of the transferred concept, and it was found that the practices of Lean Enterprise are not yet “infused with meaning”. Having further examined the change strategy in chapter 6, we found that there are several factors related to the change approaches at corporate and enterprise levels that have strongly affected the implementation outcome. It then remains to examine the degree to which difficulties can be explained through the fact that the corporation is a multinational one. Further analysis therefore attempts to highlight the importance of contextual consideration as Lean Enterprise is not only implemented cross-border, but also within an MNC. This issue is related to subordinate research question 3.

A common mistake when attempting to transfer practices across national borders within multinational corporations is taking into consideration differences in national cultures exclusively (Kostova, 1999). Kostova (1999) argues that organizational and individual level aspects are equally important, thus explaining her broader framework (cf. 2.5.1) for assessing the degree of success of transnational transfer with respect to three contexts; the social, organizational, and relational. These form the basis for the following sections, respectively.

7.1 The social context

Assessing the institutional distance, one can capture the differences in institutional characteristics of the national environments (Kostova, 1999). The level of success of transfer will vary with respect to regulatory, cognitive and normative components (cf. 2.5.1). That is, the greater the institutional distance, the harder it is to transfer management practice “without loss” (cf. 2.5.3). In this case, the institutional distance deals with the differences between the headquarters and the plant, hereunder the Central European country and Norway. Thus, the discussion is connected to how Lean Enterprise as a management concept is perceived and

understood, how it is connected with national rules and agreements, and also values associated with it.

7.1.1 Degree of involvement in Norwegian employment

Norwegian firms tend to pursue democratic leadership, where success is said to be achieved through involving employees (cf. 2.5.2). Previous analysis has revealed that lack of involvement in the implementation process has been an ongoing issue (cf. 6.2.1). Employees at the case company themselves state that being involved in decision-making is typical Norwegian, a topic that was brought up by employees during the interviews in the autumn of 2012:

Getting input from below is important here, because it is a part of the Norwegian way of thinking about organizing (Interview with HR development employee, October 2012).

Using the term “the Norwegian way of thinking”, the employee seems to speak on behalf of Norwegians in general. The statement is therefore not only his individual perception of the matter, but rather something representing the Norwegian social environment. The above quote is thus an example of the cognitive aspect as carried by one individual.

Moreover, several operators have expressed a desire to have a Norwegian version of Lean Enterprise (Field notes, March 2013). Even the plant manager has stated that creating Lean Enterprise “in Norwegian”, based on collaboration and dialogue, is one of the company’s main challenges (Interview with plant manager, November 2011). The perception that the employment and participation in Norway are tightly related is thus seemingly shared by both employees and management at the case company. As values and norms held by the people in Norway are concerned with issues of involvement and participation, these issues can be said to constitute the normative aspect of the social context. This aspect is also characterized by the broad acceptance of trade unions (cf. 2.5.2), which has traditionally also been evident at the case company (cf. 6.2.1).

Not only is involvement a norm in Norwegian employment. The Norwegian Working Environment Act regulates the right to a meaningful work situation through participation (cf. 2.5.2). Consequently, worker involvement is regulated by law and therefore forms an important part of the regulatory aspect within the social context. The characteristic cooperation between the government, employers’ associations, and trade unions in Norwegian is also regulated by

law, which is another reason for why the case company has got a strong and influential trade union (cf. 6.2.1). Involvement and participation are thus key terms when it comes to the Norwegian employment, in terms of all aspects of the social context.

7.1.2 Country level differences

Regardless of whether there are actual conflicting differences between Norway and the country in which the headquarters is situated, there is no doubt that this is a common perception among some of the Norwegian employees:

The focus is different in [the HQ's country]. Here the leaders walk around among the operators more often and participate in team meetings. In [HQ's country] there is more of a hierarchy (Interview with unit leader, November 2011).

The culture and the understanding of things at [the location of the plant] differ from down there [referring to the HQ's country] (Interview with improvement coordinator, October 2012).

We have to relate to an owner whose view of things is different. (...) There are several differences in business philosophy between [the HQ's country] and Norway (Interview with administrative employee, October 2012).

One possible explanation for this prejudice is them being used to the democratic work practices as argued in the previous subsection. These perceived country-level differences are not only brought up on a general basis, but is also explicitly stated with regard to Lean Enterprise and why it is unfit for them:

This must be done without fully transferring the mentality of [HQ's country], because that doesn't fit us (Interview with purchaser, October 2012).

It's [European]. It doesn't fit us. I'm sort of a passive spectator, but I've got eyes and ears, and I hear what's being said about it (Interview with administrative employee, October 2012).

(...) it is challenging to convert the [European] system of control to a Norwegian system that includes more participation. I understand the system of the former owner to be more preoccupied with bottom line ideas and participation (Interview with HR development employee, October 2012).

A mid-level manager explained the issue of contextual differences, when confronted to the differences between practice and intention:

[The city of the headquarters] is the core in [the MNC], everything is ruled from there, and it shall be done the way they have decided. The context there and here does not mean a lot, but it seems like [the MNC] wants to implement Lean Enterprise everywhere regardless of the different contexts (Interview with mid-level manager, October 2013).

Like this mid-level manager, also the plant manager would not necessary explain the challenges exclusively referring to cross-national differences: Although acknowledging that that it is not as evident, the plant manager seemed to understand that the differences might not be that large after all:

It might be that [European] corporations are at least as good as us when it comes to involvement of workers, but it is not put into system and expressed in the same way (Interview with plant manager, November 2011).

Several employees thus share the perception of the differences in country culture being the most prominent obstacles when implementing the concept across borders. This perception might be a misinterpreted one, as representatives from the management would not necessarily explain the challenges in national differences. This is another confirmation that there are ambiguous perceptions at different hierarchical levels (cf. 6.2.3), which again illustrates the importance of mid-level management's role in the implementation process.

Whether actual or just perceived, the differences at country level are only one part of Kostova's (1999) theoretical model of the factors of transfer success. In addition to understanding the social context, one must also try to understand the level of success of the implementation in relation to the organizational and relational contexts respectively. These are further analysed in the following sections.

7.2 The organizational context

The first aspect when analysing the organizational context (cf. 2.5.1) is the compatibility of the recipient unit with the particular concept; hence the degree to which Lean Enterprise fits the organization, and vice versa. The extent to which the organizational culture at the plant is supportive of change in general is the other aspect to be assessed. This depends on topics such as previous experiences with change efforts, lack of culture for change and possible presence of strong current practices. These two aspects are the topics of the following subsections.

7.2.1 Compatibility with Lean Enterprise

The recipient unit has a long tradition for working with change efforts. They have been working with lean under different labels and owners since the mid-1980s, to begin with as a response to requirements from their previous main customer. Later a new production system was locally developed within the company, and from the mid-1990s this system was further developed as the company underwent a change in ownership. As for today, yet a new production system has been introduced, this time by the new owner; the MNC. Lean is therefore not an unfamiliar concept to the employees (cf. 5.1), and rumours even have it that the plant and its close-by businesses were the first to practice lean in Norway (Field notes, February 2013).

As stated in the discussion of the organizational vehicles (cf. 5.2.2), Lean Enterprise assumes that involvement does not take place at operative level. This is not compatible with the general practices at the recipient company: The case company has traditionally been characterized by a high degree of participation (cf. 6.2.1), where diverging views are highly accepted as people are encouraged to speak out (Field notes, March 2013). This means that practices for information and knowledge sharing are already present within the organization, contributing to the employees' perception of the concept not being suitable. Consequently, there is a high degree of autonomy among the operators in the case company, and the management concept's inherent assumption is thus not in alignment with the actual status the recipient unit. This could produce further challenges, and based on the fallacious assumption of scarce involvement in the organization, this has contributed to a perception of the tools being control mechanisms, a matter which was carefully addressed in subsection 6.2.2.

Although there is, to some extent, a misfit between current practices and certain tools of Lean Enterprise (5.2.1), the analysis in 5.2.3 showed that there is a significant correlation between the management principles that Lean Enterprise entails and the employees' perceptions. This, in addition to organization's previous history of successfully working with lean, implies that Lean Enterprise is largely compatible with the organization. Consequently, the compatibility is found on a higher level of abstraction, whereas the physical aspects that entail incompatibility are evident on lower abstraction levels.

7.2.2 The organizational culture

The analysis has shown that the employees understand the necessity of emphasizing continuous improvement (cf. 5.2.3), which indicates that there is some favourability for change in the organization. However, the repeated exposure to change from management, as described in section 5.1, comes with a price, as this has led to the organization suffering from change fatigue. A definition offered by Elving et al. (2011) describes employees experiencing change fatigue as not feeling willing or able to put an effort into the change. We have previously showed that the perception of Lean Enterprise being “the management’s job” is shared by several employees (cf. 5.2.1). One of the administrative workers tried to explain how operators do not consider the change relevant for their everyday work life:

The operators don't see the purpose of doing these things. They've got a specialist job that they're good at, so they don't understand why they have to be scouring and washing [referring to 5S]. Even though we call this 'preventive maintenance', most of them don't give a damn (Interview with administrative worker, October 2012)

In addition to supporting the existence of change fatigue as defined above, this quote is yet another example of employees not having understood the intention and rationale of the Lean Enterprise implementation, solely regarding it a system for cleaning. Connell and Waring (2002) have found that employees who fail to perceive a rationale for change may learn to expect further changes to eventually be discarded in favour of future changes. In this way, the case company is in risk of experiencing a downward spiral with regard to employee enthusiasm.

Considering the hypothesis supported by research conducted by Elving et al. (2011) (cf. 2.1.4), being faced with problematic elements of change fatigue in this company is an issue that maybe could have been foreseen: Firstly, hypothesis 2 argues that function will be negatively related to the experienced change fatigue. In this company the operational functions constitute the largest part, hence increasing the probability of change fatigue. Secondly, the average age of the workers is relatively high (Field notes, October 2013), something which according to hypothesis 3 will contribute to the likelihood of change fatigue occurrence. As a third point, the number of changes undergone in the case company is perceived as high. This is also positively related to the experienced change fatigue, as presented in hypothesis 4. Finally, hypothesis 6 states that the perceived quality on information on the change will have a negative influence on change fatigue. As has been discussed in an earlier subsection (cf. 5.2.3), employees in different levels

of the company do not understand the intention underlying the new system. These observations could add to the understanding of why the company is faced with the experience of change fatigue among several of their employees.

Despite the common perception among the employees of Lean Enterprise being old news, several of them felt that the prior systems were functioning well. The BOHICA effect, which was introduced in section 5.1, is further described by Connell and Waring (2002) as a syndrome that arises as a response to repeated violations of the psychological contract arising from successive change initiatives. The employees thus might have failed to get a grip on why these initiatives should be liquidated and exchanged with something new:

What I really miss today, is 5S [introduced by the former owner] that we started with at a point (Interview with former union representative, November 2011).

One thing that worked well earlier was the division into zones that specific people had responsibility of keeping clean [also referring to 5s]. One weren't supposed to clean after others, but the responsibility involved keeping an eye on it. I miss that (Interview with operator, October 2012).

5S is thus an example of a tool that, according to the employees, has previously worked well. However, it is not being used in a structured manner (cf. 5.2.1) despite the fact that it is actually also a part of Lean Enterprise. The first quote shows that even the former union representative, with long experience with the plant's change efforts, associated 5S with the past. Not only are some of the Lean Enterprise tools being perceived as irrelevant, but the relevant ones, who have worked in the past within the organization, are not even being considered. An illustrative example is the operators' positive experiences with the previous tool that they call "The Stairs", which was a part of the former owner's Total Productive Maintenance (cf. 2.3.1), initiative:

We've been working on TPM before, and I liked that. With "The Stairs", we went out for a beer and a bite to eat as a reward for making progress with the system. I miss that (Interview with operator, October 2012).

"The Stairs" was a concept where each unit was classified at new levels by gradually improving their practices. Each time the intermediate aims were fulfilled, the units could formally classify at new steps; hence "moving up the stairs". Every reached step was acknowledged by the management, and as an example employees were invited to have dinner at a restaurant, like

this operator described, or simply served cake at the lunch (Field Notes, October 2012). The main idea was that progression was to be awarded by hosting social happenings to different degree, where the company showed their appreciation for the work that had been done.

Consequently, well-adapted tools and techniques introduced by former owners have simply been removed as part of the new change initiative. In fact, neither evaluations nor considerations were sufficiently made as to whether or not the already existing tools could be incorporated in the new system. This does not only strengthen the BOHICA effect, but it could also lead to a stronger perception of the change effort being merely forced down from the headquarters (cf. 6.1). Moreover, forcing what could be considered a short-run approach to the organization's long-term improvement efforts is likely to sustain the BOHICA effect. The phenomena of change fatigue and BOHICA may further cause employee preparedness to consider new change proposals to be significantly reduced. In fact, one of the main results from recent studies (e.g. Elving et al., 2011) shows that change fatigue is closely related to employee support for change. It is therefore important that management take a close look at personnel dynamics by making efforts to avoid the BOHICA effect and reduce employee experience of change fatigue. By doing so, the case the company could be one step closer to a successful implementation.

Potential reasons for implementation failures could also reside in the relationship between the parties involved (cf. 2.5.1). The third, and final, topic of the contextual analysis is thus the relational context.

7.3 The relational context

When transferring a management concept from a foreign headquarters to a recipient unit, not much is gained from understanding the social and organizational contexts if little thought is given to the relational context between these two entities. The specific relationship between the parties involved in the transfer might in itself cause transfer failure (Kostova, 1999). Kostova (1999) distinguishes between the attitudes of the transfer coalition and the degree of perceived dependency with the MNC (cf. 2.5.1). These are therefore further discussed with respect to the case company in the following subsections.

7.3.1 Attitudes of the transfer coalition

One aspect of the relational context is related to the attitudinal relationships, that is, the Norwegian company's transfer coalition's commitment to, identity with, and trust in the Central European parent company. The transfer coalition in this company consist of the plant management, the different unit leaders, and mid-level managers who are responsible for certain groups of employees, in addition to the lean leader and the lean coordinators (cf. 5.1), the latter two constituting the expert group of Lean Enterprise.

During the meeting when Lean Enterprise and the use of the whiteboard (cf. 5.2.1) were first introduced to the employees in one of the units, one of the mid-level managers found it relevant to emphasize the importance of the system that was to be implemented:

We are now at day one of a new life (Mid-level manager, May 2013).

Another mid-level manager in the same unit stressed the necessity of adjusting the Lean Enterprise tools in order for the changes to fit the particular unit:

This system [referring to the whiteboard] must then be tailor-made for each unit. We get a template, but this template must be adjusted for the specific unit (Mid-level manager, May 2013).

Both quotes could be interpreted as mid-level managements' distinct willingness to exert effort on behalf of the headquarters, and could thus be signs of the coalition members' commitment to the parent company, as described by Kostova (1999). A strong statement like the first one would further imply that great changes were about to happen. Unfortunately, later observations and conversations with the operators revealed that little change had happened during the five months following the implementation in this particular unit (Field notes, October 2013). As for the adjustments of the tool, the team leader admitted that they were measuring objects that were really not necessary considering the unit's production processes, as explained in subsection 6.2.3. Despite the initiating enthusiasm of the coalition members, actuality thus indicates a lack of commitment to the headquarters. This indication is supported by another situation, where one unit manager admitted to being familiar with the issue of the operators not understanding the system's intentions:

The operators do not understand that the system is meant to help them in visualizing the day-to-day situation (Production manager, July 2013).

Yet, it was later revealed that no further action was taken on this leader's behalf in order to improve the situation (Field notes, October 2013), indicating an unwillingness to exert effort on behalf of the headquarters. The unwillingness also reflects on other employees, like the technician who admitted to juggling the numbers in order for them to be "correct", and the mid-level manager who wanted to "protect" his employees by stating that figures should be marked as green as long as they did not do anything "wrong" (cf. 6.2.3).

Kostova (1999) further argues that members of the transfer coalition who identify with the parent company are likely to share the values and the beliefs of the company embodied in the practice that is being transferred. Even though the plant manager has explicitly stated that they at the recipient unit have not been totally supportive of the change effort (cf. 6.2.2), this does not necessarily exclude this sense of identity with the MNC in general. Moreover, a lean coordinator, as another member of the transfer coalition, wanted to show the representatives of the new owner a state of attachment:

One of the greatest actions we had to do before the visit by the [HQ's representatives], was to get rid of the [former owner's] logo. We did actually wear [the former owner's] clothes for a year after the acquisition (Interview with lean coordinator, November 2011).

Another two years later, t-shirts and other artifacts with the old logo was still observed at the case company (Field notes, May 2013). When asked, operators in one unit explained that they identified more with the particular unit in which they work, rather than with the present or prior owners (Field notes, October 2013). As just stated, employees in the same unit have not changed the way they work since the implementation. What was further interesting was that operators used the word "their" when talking about the figures, referring to them as belonging to the corporation (Field notes, October 2013). It is thus evident that the self-identity of the employees does not to a prominent degree derive from the membership in the multinational corporation.

When it comes to Kostova's (1999) aspect of trust in the parent company as part of the relation context, there are no empirical findings suggesting that there is disbelief within the case company in the corporate headquarters' intentions. In this sense, there are no grounds for concluding whether or not trust issues could explain the experienced implementation difficulties.

The transfer coalition is key in understanding and interpreting the practice and its value to the particular unit, and thus also responsible for “selling” the practice to the other employees (Kostova, 1999). Unfortunately, this case has pointed at several factors indicating a lack of commitment to, and identity with, the parent company within this transfer coalition. Since these attitudinal relationships are factors that affect the motivation of the employees to engage actively in the transfer process (Kostova, 1999), it is likely to affect the overall success of transfer.

7.3.2 Degree of perceived dependency

In addition to the attitudinal relationship, a second aspect of the relational context is the power and dependence relationship (cf. 2.5.1). When discussing the differences related to the former and the current owner, employees in various units referred to the market accessibility in particular:

There are positive aspects of us having become a part of [the MNC], as we have gained more contacts in the automobile industry (Interview with operator, October 2012).

With [the MNC] we've got more parts [referring to the range of products] and more jobs (Operator, October 2013).

We're doing the same as before, but we've got more products (Operator, 2013).

It thus seems to be a common knowledge among operators that the corporation is an important actor within the automobile industry, as also commented in section 5.2.3. For this reason, the case company as the recipient unit of the concept is not only dependent on their owner due to financial means, but also the access to market knowledge. One could therefore argue that there are perceptions of dependence on the parent company. What Kostova (1999) proposes, is that this perceived dependency will be positively associated with the implementation of the practice that is being transferred. She does, however, further argue that the positive association does not include the internalization of the practice. This dependency to the MNC might be one of the reasons why the subsidiary seems to be doing as told by the headquarters, even when the given tools and techniques are perceived as unfit or unnecessary (cf. 5.2.1).

The strong actor on the one hand, represented by the headquarters and the less powerful recipient unit at the other, thus make the division of powers imbalanced. Consequently,

regardless if there is an actual dependency with the MNC, there is a perceived dependency at the case company to the current owner.

7.4 Concluding comments

The findings of this chapter indicate that Lean Enterprise could be seen as contextually embedded, implying that the success of transfer must be analysed on the basis of different contextual perspectives. The high degree of involvement and collaboration which characterize the Norwegian employment, both in terms of laws and general norms, has appeared evident in this case. These distinct characteristics, and the shared ideas of what it entails to be part of the Norwegian work life, could lead to the emergence of a perception of country level differences being immensely important. Whether the degree of difference is actual or only perceived, this must be addressed in order to succeed with the transfer of the concept.

As stated in theory, a common mistake when attempting to transfer practices across national borders within such MNCs is to take into consideration differences in national cultures exclusively. This case has confirmed that it is easy to jump to conclusions, as some of the employees are claiming that it is the merely national differences that cause such contextual challenges. For this reason, one must also consider other contextual aspects. From an organizational perspective it is found that there is a partial compatibility between the case company and Lean Enterprise, but that the organizational culture is clearly affected by change fatigue. With respect to the relational context, the transfer coalition is key in understanding and interpreting the practice and its value to the particular unit. However, this case indicates a lack of commitment to, and identity with, the parent company within this transfer coalition. Another factor is the experienced dependency to the MNC, which may have caused the subsidiary to uncritically obey the headquarters.

Consequently, the lack of sufficient consideration to the different contexts may be a contributor to the experienced difficulties in implementing Lean Enterprise; practices have not yet being “infused with meaning”, which Kostova (1999) argues is a key factor for success when transferring practices cross-border within MNCs.

Chapter 8:

IDENTIFICATION OF COMMUNITIES OF PRACTICE

Having examined the transfer of the management concept from the foreign headquarters to the recipient unit in the previous chapters, it is evident that understanding and creating an alignment with existing practices is eventually the key for successful implementation. The organizational dynamics that emerge when the organization faces the management concept are truly complex. The analysis is thus now taken one step further, focusing on specific groups of individuals; social configurations at the recipient unit. The aim is to examine what happens as a social configuration that can be identified as a community of practice is being faced with the concept. This is also explicitly expressed in the main research question: “What are the possible explanations for the difficulties in implementation of Lean Enterprise from the headquarters to a community of practice within the recipient unit of a multinational corporation?”

This chapter aim to provide an answer to subordinate question 4; to identify and compare communities of practice, founding the basis for further analysis of the main research question. Communities of practice have been defined as “groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis” (Wenger et al., 2002, p. 4). However, communities of practice can be immensely diverse, and they are formed for a variety of different reasons (cf. 2.6.1). The following sections therefore describe a selection of three different social configurations within the case company. Each of them is analysed on the basis of Wenger’s (1998) 14 indicators (cf. 2.6.3), which are replicated in the following table 3:

No.	Indicator
1	Sustained mutual relationships - harmonious or conflictual
2	Shared ways of engaging in doing things together
3	The rapid flow of information and propagation of innovation
4	Absence of introductory preambles, as if conversations and interactions were merely the continuation of an ongoing process
5	Very quick setup of a problem to be discussed
6	Substantial overlap in participants' descriptions of who belongs
7	Knowing what others know, what they can do, and how they can contribute to an enterprise
8	Mutually defining identities
9	The ability to assess the appropriateness of actions and products
10	Specific tools, representations, and other artifacts
11	Local lore, shared stories, inside jokes, knowing laughter
12	Jargon and shortcuts to communication as well as the ease of producing new ones
13	Certain styles recognized as displaying membership
14	A shared discourse reflecting a certain perspective on the world

Table 3: Indicators that a community of practice has formed (Wenger, 1998)

The framework for identifying communities of practice in subsection 2.6.4 is then used as a tool for determining whether or not these social configurations can be treated as communities of practice. As previously presented (cf. 2.6.3), the indicators can be categorized with respect to the three dimensions of communities of practice; mutual engagement, joint enterprise, and shared repertoire. Our criterion for a social configuration to be classified a community of practice is, in accordance with Wenger's (1998) argumentation, that all three dimensions are represented. The analysis of the indicators that are present within each social configuration respectively is therefore followed by a discussion on whether or not it can be considered a community of practice by our definition.

Operators and other blue-collar workers are the ones expected to adapt to the management concept in the actual production. This group of non-administrative employees constitutes a large proportion of the company's workforce, and analysing the blue-collar workers as an overall social configuration therefore a natural point of departure. Due to the fact that people form communities of practice for a variety of reasons, also other social configurations within the case company are examined. The second section in this chapter concerns a unit, which we have chosen to call Department X, in which a relatively small group of people have worked close together for decades. The third and final social configuration under study is the maintenance workers, as they are a group of employees who share the same working title and function within the case company.

8.1 The blue-collar workers

In this analysis the term 'blue-collar workers' is used to refer to the entire group of employees that work on the shop floor, such as operators, toolmakers, and maintenance workers. These are typically wage earners whose work often involves manual labour. However, the blue-collar workers do not all work together or with the same production procedures. Some are maintenance mechanics, while others build new and complicated tools. Some work highly manually, while others primarily control automatic manufacturing machines. Some spend most of their working hours alone, while others are parts of semi-autonomous teams. Regardless the differences, they share a set of commonalities that cannot simply be ignored. The following analysis therefore aims to determine whether or not the diverse social configuration of blue-collar workers can be treated as a community of practice or not.

8.1.1 Analysis of indicators

A prevailing characteristic of the operators and the other blue-collar workers is the way they refer to themselves using the term “us” and “we”. These terms are often accompanied by phrases such as “down here” and “on the shop floor”:

Yes, we work together. We are a team, those on the production line and us on maintenance. It works best “on the floor”, that is, when it doesn't come from the top (Interview with maintenance worker, October 2012).

He's got a new position as an improvement coordinator (...) He has worked on “the floor” himself, and he knows how things work down here, so that's good. It's easier when it's someone who understands how we work (Interview with operator, October 2012).

It appears that there is an overlap in participants' descriptions of who belongs, and that members are the ones who relate to, and identify with, the actual processes of production. Hence, Wenger's (1998) indicators 6 and 8 appear present. The latter quote is an example of an operator expressing the importance of the Lean Enterprise coordinators having worked in the production themselves, and thus at some point having been members of this blue-collar group of employees. In most units, team leaders take part in the production together with the operators, and they do not particularly stand out (Field notes, October 2012). In this way, even some of the team leaders can be considered members:

[The lean leader] is working on some concepts (...). He interprets it different than us (Interview with team leader, November 2011).

Apparently, this team leader identifies himself as a part of the group, talking of the lean leader as an “outsider” to this community. Moreover, jargon and shortcuts to communication also indicate the formation of a community of practice (Wenger, 1998). This is listed as indicator 12, and is present in at least two ways in the large group of blue-collar workers at the factory, hence supporting the hypothesis that it can be considered a community of practice. Firstly, the development and use of nicknames describing different people in the organization was observed in several of the units. When referring to the administrative employees, one of the operators talked about “the denims”. According to the workers this was a commonly used metaphor as the employees at higher hierarchical levels were the only ones wearing a pair of denims at work (Field notes, July 2012). Nicknames were also established among the workers themselves. As an example, one of the operators was frequently called “the guru”, as he was the one to rely on when something

needed to be fixed (Field notes, July 2012). In another unit one employee was nicknamed after his dialect and place of origin (Field notes, May 2013). Secondly, the shared way of talking about the introduction course to lean and Lean Enterprise also supports the presence of indicator 12. The course included a practical exercise involving Lego brick building to illustrate improvement in efficiency, and unfortunately this practical exercise was experienced as irrelevant by many employees (cf. 5.2.3). For this reason it soon became known among most blue-collars as ‘the Lego course’:

Yes, I've attended the Lego course, as we used to call it [laughing] (Interview with maintenance mechanic, October 2012).

Yes, we did attend a course with some Lego building and stuff. No, it's not related to what we do here (...) (Interview with maintenance electrician, October 2012).

The shift leader in one of the factory units spoke of the course in the same terms:

I haven't been to the Lego course (Interview with shift leader, October 2012).

The fact that the expression was used by the shift leader may support the theory of him being a member of the group. Even one of the unit leaders recognized and emphasized the language of the blue-collars as different. He also realized that in order for him and other outsiders to be able to cooperate with the various blue-collars, understanding the way they communicate is a key:

It is the same thing with civil engineers that have been here. They speak a totally different language, because they do not relate to the language on “the floor”. I translated a lot before presenting it to the operators, as there are quite a few words from school that operators understand to be negative. (...) If you don't watch out for it, their guards are out (...). I've been there myself and I know how they think, so I feel that we cooperate well now (Interview with unit leader, October 2012).

Not only is the introduction course known among those who have attended the it, but it is also a topic of conversation as they tell other blue-collars stories about it. This came up in some of the interviews in the autumn of 2012:

I haven't attended the course yet, but I've heard it's about building Lego (Interview with toolmaker, October 2012).

I've actually heard about it by the guy who was here before me, because he has completed the course. I heard it was good times [laughing ironically]. What did you call the system again? (Interview with operator, October 2012)

The latter interviewee remembered being told stories about the Lego building, although he had no remembrance of being told about lean or the company specific production system. Such storytelling is yet another indicator as described by Wenger (1998) of the formation of a community of practice. The fact that several of the interviewees were laughing when talking about the course may further signalize a shared humour and way of joking about it.

The way of joking and is also exemplified in the following described situation: When working at the factory in the summer of 2013, one of our fellow researchers had to talk to one specific employee. He showed up at his office where he met three men who looked like they were in a meeting. He asked if any of them was the person he was looking for, and whether he could come back at some later point to meet with him. They replied that nobody with that name worked there, or at least that “he works so poorly that it cannot really be called working” (Field notes, July 2013). Then they all laughed. The researcher recognized the humour as the typical “factory humor” based on his previous experiences as a summer assistant at another production unit. Twenty minutes later the student asked some of the operators on the shop floor about the person he needed to talk to. They pointed him out, and he turned out to be one of the guys who were previously laughing in the office (Field notes, July 2013). This situation is an example of inside jokes and knowing laughter, which together with storytelling constitute Wenger’s (1998) indicator 11.

There are also certain styles recognized as displaying membership, and in this case the way of dressing is maybe the most prominent one. As previously discussed, “the denims” was a term commonly used by operators in one unit when referring to the administrative employees, as they did not wear typical work pants. A year later, one of the researchers became known among other blue-collars as the guy who wears denims instead of work pants when inside the factory (Field notes, July 2013). In short, blue-collars wear work clothes, while the use of more formal outfits clearly indicates being an outsider to this group of workers:

It ends in cultural clashes when [somebody] walks in here with pointy safety shoes and headband! (Interview with process technician, October 2012)

(...) if you try to walk in here wearing a white shirt they [the operators] would put you in place (Team leader, July 2012).

The latter statement was made by a team leader when discussing the workers and their way of dressing. These are examples of simple things such as clothing being clearly recognized as displaying membership, hence indicator 13 is apparent. What is further interesting is the shared perspective among workers on what is important and what is really part of a blue-collar's job. When being asked about Lean Enterprise, the answer by one of the operators implies a clear distinction between "the actual job" and other tasks:

I guess it depends on how much effort people wish to put into it. Whether people wish to come to work to do their job, or ... [pause] ... you know (Interview with operator, October 2012).

The same tendency was observed the following year, as operators in another unit consequently chose not to attend the team meetings in order to prioritize production. One operator even explicitly stated that getting the job done was more important (Field notes, October 2013). Also other employees are well aware of this "blue-collar attitude" towards Lean Enterprise, lean and company-specific improvement programs in general. For instance, one of the administrative workers explained that the operators simply "do not give a damn" (cf. 7.2.2). Previous analysis has revealed that the perception of change efforts being merely management's business is common (cf. 5.2.1). As further argued in subsection 7.2.2, repeated change efforts have left the company with issues related to change fatigue. Several employees, and especially blue-collar, have become tired of, and indifferent to, change initiatives. These are all examples of shared perspectives, hence examples of indicator 14, supporting the idea of a social configuration of blue-collar constituting a community of practice.

8.1.2 Blue-collar - a community of practice?

In summary, the above analysis has established the presence of Wenger's (1998) indicators 6, 8, 11, 12, 13, and 14 that are replicated in table 3 (cf. 8). Further, Figure 4 illustrates the distribution of the present indicators with respect to the three dimensions; mutual engagement, joint enterprise, and shared repertoire, having used Framework A from subsection 2.6.4.

No.	Indicator	Mutual engagement	Joint enterprise	Shared repertoire
1	Sustained mutual relationships - harmonious or conflictual	<input type="checkbox"/>		
2	Shared ways of engaging in doing things together	<input type="checkbox"/>	<input type="checkbox"/>	
3	The rapid flow of information and propagation of innovation	<input type="checkbox"/>		
4	Absence of introductory preambles, as if conversations and interactions were merely the continuation of an ongoing process	<input type="checkbox"/>		<input type="checkbox"/>
5	Very quick setup of a problem to be discussed	<input type="checkbox"/>		<input type="checkbox"/>
6	Substantial overlap in participants' descriptions of who belongs	<input checked="" type="checkbox"/>		
7	Knowing what others know, what they can do, and how they can contribute to an enterprise	<input type="checkbox"/>		
8	Mutually defining identities	<input checked="" type="checkbox"/>		
9	The ability to assess the appropriateness of actions and products		<input type="checkbox"/>	
10	Specific tools, representations, and other artifacts			<input type="checkbox"/>
11	Local lore, shared stories, inside jokes, knowing laughter			<input checked="" type="checkbox"/>
12	Jargon and shortcuts to communication as well as the ease of producing new ones	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
13	Certain styles recognized as displaying membership	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
14	A shared discourse reflecting a certain perspective on the world		<input checked="" type="checkbox"/>	

= Indicator is identified

Figure 4: Distribution of indicators within the social configuration of the blue-collar (Framework A applied)

Indicators within all three dimensions are present, implying that this social configuration is a combination of a mutual engagement, a joint enterprise and a shared repertoire. The application of the framework has thus confirmed that the social configuration of blue-collars can indeed be treated as a community of practice. At first glance, however, this community of practice has not got an immensely strong representation of either of the dimensions, as none of them obtain by more than half of the possible indicators. The blue-collars constitute members with various professions and functions, and at different locations. In spite of this, the members have developed mutual defining identities, certain styles, and ways of communicating, which make it possible to distinguish who belongs. This clearly illustrates how the mutual engagement can be a matter of diversity as much as of homogeneity (cf. 2.6.2). Similarly, the common language and styles displaying membership, together with the characteristic sense of humour, constitute what can be recognized as the shared repertoire of the community of practice. However, when it comes to the joint enterprise, hence what keeps the community of practice together, this does not appear as evident as the other two dimensions. A possible explanation could thus be the lack of geographical proximity, as the members have a long tradition for working in physically separated units. This precludes physical interaction on a daily basis, thus hindering the creation of a distinct joint enterprise. Consequently, what characterizes this community of practice is first of all their identities and appearance as blue-collars, thus through the sense of the mutual engagement and the repertoire they share.

8.2 Department X

According to Wenger (1998), geographical proximity is not sufficient to develop a practice. He argues that a community of practice does not form because a group of people work in the same office, but rather as a result of the members sustaining dense relations of mutual engagement organized around what they are there to do. This subsection therefore provides an analysis of a single unit at the factory, where a rather small number of employees work together in a geographically limited area. The discussion is followed by a conclusion of whether or not the employees at this unit, Department X, have formed a community of practice through years of working together.

8.2.1 Analysis of indicators

The units of the case company vary to a great degree and Department X differs from most other units at the factory in a range of ways. Firstly, as demand is low in comparison to other units, it operates with only one shift a day. Secondly, the unit is a relatively small one with only a dozen operators working there in addition to the team leader, two mid-level managers and the unit leader. This basically means that all operators meet on a daily basis. Thirdly, there are no automated production lines, that is, production is highly manual. Lastly, the operators do to a high degree decide as a group how to divide the work between them. In addition, it is worth mentioning that there are no recently employed operators at Department X, as the newest member this group was transferred from a nearby unit within the same company almost five years ago (Field notes, October 2013).

Wenger (1998) argues that “mutual engagement does not entail homogeneity, but it does create relationships among people. (...) a community of practice can become a very tight node of interpersonal relationships” (p.76). As mentioned above, this group of people has worked together for years, and even decades and they see each other more or less every working day of the week. This has led to the workers developing sustained mutual relationships, that are, for the most, harmonious. Hence, Wenger’s (1998) indicator 1 that a community of practice has formed is present.

The members of this social configuration have also got shared ways of engaging in doing things together. A common feature is the expectation of knowing the different work procedures by heart. When they do not possess the required knowledge of a certain product, operators are more likely to try and fail, rather than using written instructions. The following is an example that verifies this. When efforts were made in updating and developing new work instructions in May 2013, the work instructions for the different products in this unit had long been outdated or even missing. This was not a result of initiatives by the operators themselves, but rather by mid-level management due to an upcoming audit by top management (Field notes, May 2013). The two of us spent a total of three weeks working at the unit (cf. 4.2.4), primarily constructing and updating the work instructions for the various products, and during the summer two of our fellow research assistants continued this work. The operators responded positively to these efforts to improve documentation, and they were more than happy to go through the production processes with us.

This was of great importance, as each operator had evolved an ownership for certain products, and thus knew the pertinent process steps by heart. Despite the initial positive reactions by the operators, not many of them showed any interest in using the new instructions. A new instruction sheet had been made with the help from an operator who knows the process well. As she was on vacation, another operator was to produce this specific product. Although this person was a bit unsure about the process steps, she continued the job without paying attention to the work instruction. She was reminded of the new instruction by the two research assistants, who recommended her to have a look at it in case she was uncertain. Even so, she did not use it. A subtle check by the assistants, however, showed that she eventually performed the work procedure correctly (Field notes, July 2013). In fact, it took nearly half a year for employees to finally recognize the use of the work instructions:

Suddenly you are faced with a product you don't remember how to produce. It's good to be able to look it up (Operator, October 2013).

In spite of the work instructions slowly being accepted, not many employees were observed paying them much attention. Instead, asking co-operators for advice was more common (Field notes, October 2013). In spite of the commonly shared importance of “being able to do things by myself”, there is also a culture of helping each other out at whenever necessary. When asked about whether or not they work in teams, responses like this were common:

We don't work directly as a team in the production, but there is always someone there who can step in and help (Operator, October 2013).

This way of working together, and relying on oneself and the others is what Wenger (1998) describe as indicator 2. Another prominent feature is the rapid flow of information between the members of this social configuration. The only written source of information besides the newly updated work instructions is the production plan that lists the products that need to be ready for delivery within the coming days and weeks.

Yes, it happens from time to time that I walk over to the board to have a look at the production plan (Operator, October 2013).

Other than this sheet of information, not much is shared in written forms. As they occur, changes to production are not only daily edited on this plan. During lunch, coffee break, or simply meeting at the shop floor, the team leader continuously keeps the other operators

informed of any changes in the plan. As a matter of fact, the team leader himself helps out on the shop floor when schedule is tight or when he has some spare time, and the other operators do not hesitate to ask for his help when it is needed (Field notes, May 2013; October 2013). Even though the operators at most times work on a product individually, they were observed continuously informing each other of how they were doing, the estimated time left working on the current product, and so forth (Field notes, May 2013; October 2013). Messages are thus delivered informal and more or less spontaneously during day-to-day conversation, implying a clear presence of Wenger's (1998) indicator 3. This is also supported by the situation when one of the operators explicitly asked if she could be excused from the introductory meeting to Lean Enterprise in May 2013, as she was confident that she would be notified shortly afterwards (cf. 6.2).

As just mentioned, conversations flow easily and they often appear a continuation of an ongoing process. What is more, our observations indicate that parts of the communication need not at all be explicitly expressed. As part of the packing process of products at Department X, all racks are covered either in plastic film or with a plastic cap before shipping. When using the latter, help from a co-operator is often considered useful. An example illustrating the absence of introductory preambles is the situation when one of the passing operators spontaneously helped out with the plastic cap without spoken communication of any kind (Field notes, October 2013). She automatically knew when to help out, and did so instinctively. This is not merely the same as knowing the different work procedures and therefore being able to help out, but also knowing who would like the help and at what time. This is an example of the absence of introductory preambles, which is indicator 4 of the formation of a community of practice. Not only do our observations suggest an emergent and easy flowing character of work allocation at this unit, as this is also explicitly confirmed by an operator:

The allocation and execution of work here is very much easy flowing (Operator, October 2013).

One morning as the team leader and one of the mid-level managers were about to meet, they were made aware of a problem on the shop floor. A batch of crash boxes that had arrived from the surface treatment had been left discoloured. Instead of carrying through with the meeting as intended, they took an immediate discussion with the group of operators, and came to an agreement of what to do next (Field notes, October 2013). This shows a flexibility and solution

orientation of the group as a whole, as they dealt with a problem more or less immediately without excessive planning. This situation is an example of Department X possessing Wenger's (1998) indicator 5 that a community of practice has formed, namely the very quick setup of a problem to be discussed. This was also emphasized by one of the operators when discussing rush orders in particular:

When we are dealing with rush orders we help each other out (Operator, October 2013).

As mentioned above, the team leader steps in to help out with the work of the operators whenever necessary. When he has got some spare time, he does this on own initiative, and he also helps out when asked by the other operators, who do not hesitate to do so (Field notes, May 2013; October 2013). In this sense, the team leader is considered "one of the guys". Being an operator who is daily present at the shop floor, the team leader is very much a member of this community of practice as described. Also the mid-level managers have, according to themselves, developed a strong bond with the operators as a result of working together with them for years. One of them often took the time to emphasize his focus on the operators' well-being and the importance of being visible to them:

I tell the operators: You're not here for me; I'm here for you (Mid-level manager, October 2013).

What this quote shows, however, is that he sees himself as someone slightly peripheral to the group of operators. There appears to be a clear distinction between the kind of membership of the workers at the shop floor, including the team leader, and the mid-level managers on the first floor whose work mainly is done outside the shop floor. As will be presented later on, the team leader to a greater degree shares the operators' view on the work place and what is important. What has been described here is a community of practice that consists of the operators, and in which the team leader and the mid-level managers to various degrees appear members. The unit leader, who also functions as the head of Human Resources, does not possess the same membership. Conversations with the different employees reveal that there is a substantial overlap in their understanding of who belongs to their group; hence indicator 6 is also present. Moreover, having worked at Department X and with the same people for a long period of time, the members of this social configuration strongly identify with each other and the unit. In spite of several changes in ownership during the last decades they do, in fact, perceive themselves and their practice the same as always:

We work in the same way as we have always done. The only difference since [the change in ownership] is the localization within the premises (Operator, October 2013).

For quite some time Department X was the under prioritized unit at the factory, both with regards to money and other resources. This left the employees feeling somewhat superfluous:

We were nothing but a balancing item (Mid-level manager, October 2013).

We were just the ones who used to potter around with some old stuff in a corner (Mid-level manager, October 2013).

More recently, however, this has changed substantially, as the plant management has started to appreciate the unit's contributions. In fact, the current unit leader of this unit is part of the management group:

Until recently, we have never before had a representative in the management team. [The unit leader] reports back to us that Department X is now placed on top of the budget. What's changed is that we're now taken more seriously internally in the company (Mid-level manager, October 2013).

Despite this long-awaited change, the mid-level managers are still under the impression that the metal forming lines are considered the most important, and that Department X is still considered of secondary importance. It thus seems as if the years of sticking together through the hard times have influenced the identities of the employees at Department X, operators as well as the team leader and mid-level managers. As previously mentioned, employees at this unit are used rapidly dealing with problems as they occur. What seems, however, to complicate the practice at the unit is the fact that this constant quick setup for discussing and solving problems have left the employees feeling like it is their job to do deal with others' problems:

We have to act rapidly. There's no use in planning (Team leader, October 2013).

It's not right that we're faced with deviations when it's really they [another unit] that have used too much time (Operator, October 2013).

We've got a long tradition for jumping when the customer tells us to (Mid-level manager, October 2013).

Tackling the problems of others has become part of who the members of this community of practice are. In this regard the mid-level managers also share the mutually defined identities, which represent number 8 in Wenger's (1998) list of indicators that a community of practice has formed.

Knowing what the other members know and what they can do is the next indicator on this list; indicator 7. At Department X we have observed the operators easily locating the correct person when they encounter issues that they need help solving (Field notes, May 2013; October 2013). They know who the expert on a given product is. In addition, they seem to have developed a way of working in which each operator has got more responsibility for given products. This is one of the reasons why the allocation of work flows as easily as previously discussed without the need for extensive communication. When receiving an order for a specific batch of bumpers that are very rarely produced, the mid-level managers had to find what they referred to as “a grey-haired person” in order to figure out how it was done (Field notes, October 2013). Since very little has previously been documented, they thus knew that they had to talk to the oldest operators in order to find the correct person to address the problem. In this sense, the operators would use the knowledge acquired through several years of experience.

Even though the operators spend most part of the day working individually, there is no lack of conversations and humour. One of the first things we noticed during our three weeks stay at the unit was the continuous sarcastic comments and the laughter (Field notes, May 2013). This was also observed by our fellow researchers, who recorded the following in their field notes as operators faced a problem in the production: One of the operators had a look at it, but did not know what had gone wrong. Maintenance had been informed, and two female operators was making fun and saying in a humoristic tone:

He [the other operator] can't do anything right! You're just screwing things up! (Operator, July 2013)

The male operator laughed and yelled back at them:

Damn you, women. I'm so sick of you cackling hens just standing there talking! (Operator, July 2013)

The women laughed again at this comment (Field notes, July 2013). Consequently, this kind of sarcasm seemed to be just a regular part of the daily communication, illustrating the how the members know laughter and inside jokes. Hence, indicator 11 is evident in this social configuration. Further, also jargon and shortcuts to communication represent this group, and like for the blue-collars in general, nicknames are common (cf. 9.1.1). When referring to the various types of racks for packing, the operators at this unit use different short words that have no direct

logical explanation (Field notes, May 2013), and for this reason are unknown to most outsiders, like us. Such short-cuts ease the conversation as supposed to having to give a description of the brand and look of the correct rack, and these are thus examples of indicator 12.

The team meeting and use of the whiteboard varies substantially between the different units at the factory (cf. 5.2.1). According to the unit leader, the operators at Department X have consistently chosen not to attend the team meetings in order to prioritize production (Field notes, October 2013). In addition to the unit leader admitting to this being the reason that the operators are not attending, one of the operators stated it herself, as she was asked why this is:

We are doing our job. That's what's the most important (Operator, October 2013).

She did not say it like this was her personal perception, but rather as if it was a mutual agreed upon perception by all operators at the unit. What supports this impression is the fact that all operators in the unit act in the same way; avoiding the team meetings even though they know all employees at the unit are supposed to attend. The team leader and the mid-level manager who carry out this meeting every morning have done nothing to change this behaviour. In this way they express the same attitude as to what is the most important. Like in the analysis of blue-collars in general, it can therefore be argued that the perception of “performing the actual job being the most important” is a shared perspective in Department X. This is supported in previous research, like Orr (1996) who argue that the main goal of practice on operative level “is getting the work done” (p. 6). Such a shared discourse demonstrates the presence of indicator 14. The fact that they all prioritize the work tasks, rather than attend the meetings, reflects the member’s ability to assess the appropriateness of certain actions, which coincide with indicator 9. This is in alignment with the statement of Contu and Willmott (2003); that communities of practice regard a demonstrated ability to read the local context and further act in ways that are recognized and valued by other members of the immediate community of practice.

8.2.2 Department X - a community of practice?

The above analysis has established the existence of indicators 1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 12, and 14. The description of these indicators is provided in table 3 (cf. 8). Figure 5 illustrates the identified indicators within the Department X social configuration as they are distributed with respect to the three dimensions; mutual engagement, joint enterprise, and shared repertoire.

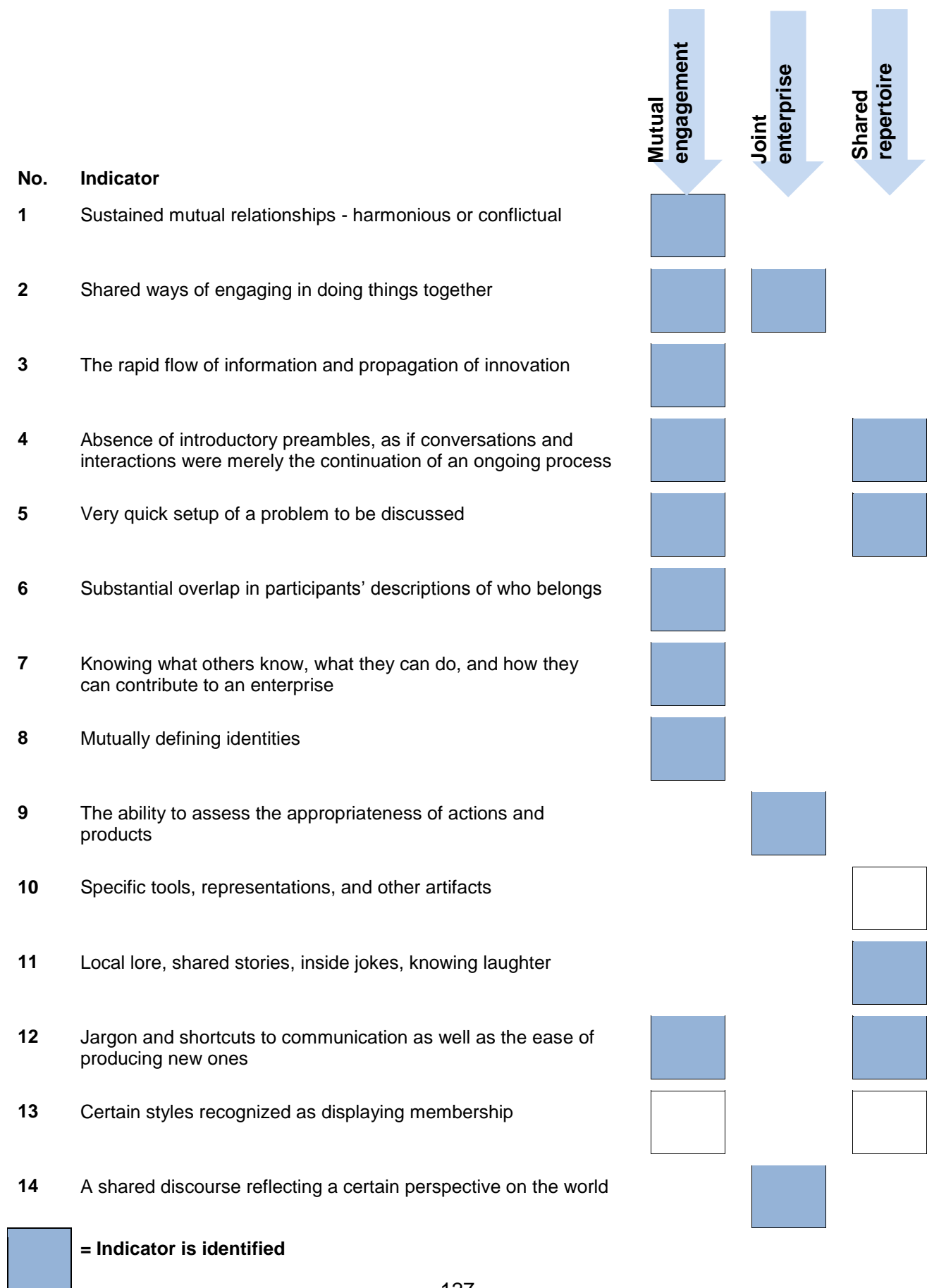


Figure 5: Distribution of indicators within the social configuration of Department X (Framework A applied)

Indicators are identified within all three dimensions in the case of Department X, implying that the requirement for being treated as a community of practice is met. Furthermore, all three dimensions are represented by more than half of the possible indicators, strengthening the conclusion that Department X does in fact constitute a community of practice. It is found that this community has got the strongest representation through the dimensions of mutual engagement and joint enterprise. With respect to the first dimension, the members are connected to each other in complex ways, through sustained mutual relationships, established ways of communicating and their identities as being a part of Department X. As all but one of the indicators within this dimension are covered, this example demonstrates how geographical proximity is of great importance, as mutual engagement requires interactions (cf. 8.2). With respect to the latter dimension, Department X is characterized by a strong sense of joint enterprise through the members' shared ways of engaging in doing things together, the ability to assess the appropriateness of actions and a shared discourse reflecting a certain perceptive. Although not quite as prominent as the first two dimensions, the members of Department X have also developed a distinct repertoire, which is especially characterized by their way of communicating and their local lore. In summary, Department X is a community of practice in which the strong representation of the three dimensions clearly grows from the members' perpetual interaction.

8.3 Maintenance workers

This section shows how another group of employees at the factory has formed tight relationships through years of working both together and with other operators around the factory. This group is formally known as the maintenance unit, and it stands out from most others due to the characteristics of their work-tasks, and the fact that their work is required and performed in the whole plant. For this reason, the unit is not distinguished by geographical proximity is. As argued in section 8.1, the maintenance workers belong to the social configuration of blue-collars at the case company. However, the maintenance workers themselves share a unique set of commonalities that needs to be highlighted. The objective of the following analysis is thus to determine whether the maintenance workers, as a social configuration in itself, could be treated as a community of practice.

8.3.1 Analysis of indicators

The maintenance unit constitutes in total of between 50 and 60 people. They have different professional backgrounds, although most are mechanics and electricians. The multidisciplinary of this group makes them prepared to solve most technical problems that could occur in the whole factory:

We are involved in the most parts; production, improvements. Everything in which maintenance is needed (Interview with assisting maintenance leader, October 2012).

The maintenance workers have indeed a special position at the factory, and one mid-level manager once spoke of the maintenance mechanics as “chieftains” (Field notes, October 2013). This description has probably emerged as a consequence of the power inherent in their work tasks; when the machines fail, the whole factory relies on the maintenance unit's ability to make them function again, as this usually goes beyond the operators' competence. Moreover, the maintenance unit's continuous preventive work is an important means to prevent shutdowns in the future, and it thus plays a key role in contributing to cost-savings by preventive rather than proactive actions (Lee, 2005).

When talking about themselves as a group, both the maintenance workers and the unit leader explicitly talk of “us at maintenance” (Field notes, October 2012). It seems therefore to be a common understanding of who belongs to their configuration, as these are the ones performing the maintenance work, having in common that they together constitute the whole maintenance function at the plant. In this sense, Wenger's (1998) indicator 6 is present, as the participants seem to know who belongs to this group. Although the maintenance workers refer to themselves as “us”, their identities are also tightly connected to the places where they spend the days. Only seven of them are receiving a monthly salary. The rest are time-based workers at four different production zones at the factory, which is a new way of arranging work at the unit. The leader of Maintenance explained:

We at Maintenance have zones; people are dedicated to the production lines (...). The maintenance people have their own zone offices outside. They belong to Maintenance, but they're most controlled by the team leaders, who reports to the maintenance manager (Interview with maintenance leader, October 2012).

In other words, the maintenance workers have in common that they belong primarily to the maintenance unit, although they are spending their work-days at the different zones. The above quote indicates that they have developed special sustained relationships with each other, which implies the presence of Wenger's (1998) indicator 1. However, the geographical duality creates a special relationship, due to the fact that the maintenance workers experience being part of two different teams at the same time; both the maintenance unit and the zone in which where they are placed:

Yes, like, we're a team the whole maintenance unit. As well as a part of the team at the production line. Both are important (Interview with maintenance worker, October 2012).

Moreover, some felt that new ways of structuring the work had had an important impact on the perception of being dedicated to a certain place. This perception was confirmed by non-maintenance operators at the zones, as exemplified in the second quote, when asked whether he worked in a team.

Before people were placed at a specific zone, people were sent around, so that you didn't develop the sense of belonging as we have done today (Interview with maintenance mechanic, October 2012).

Yes, we at the shift, plus process and maintenance. It works well (Interview with operator, October 2012).

From this operator's perspective, the maintenance workers were also perceived as "one of the guys". A maintenance worker described the coordination of belonging to two different teams to be unproblematic (Field notes, October 2012). However, the sense of belonging to the zones was not fully shared by all maintenance workers, indicating that some identified more with their home maintenance unit rather than the zones:

We're in a way a separate unit, although it is here at [the production line] we are located (Interview with maintenance electrician, October 2012).

In my opinion, we're a bit off-centred (Interview with maintenance mechanic, October 2012).

We're for the most meant to be supporting the other workers (Interview with maintenance mechanic, October 2012).

The first quote might imply that the electrician perceives his identity as more connected to the maintenance unit, while the zone was related to geographical presence. Similarly, neither of the

mechanics felt fully included in the daily practices were they perform their work, and one even perceived themselves as filling a supportive function. These perceptions were also supported by the maintenance leader:

They are dedicated outside in the team (...). But they are not as dedicated as those who work in the actual production (Interview with maintenance leader, October 2012).

From the zones' point of view, the maintenance workers could be perceived as being peripheral to the rest of the group. As an example, although suggestions are proposed at team meetings where both operators and maintenance workers attend, their participation is not always on the same terms:

We see that if it [a proposal] comes from a maintenance guy, it is more superficial than if it comes from "those at the shop floor" - then we really want to solve the problem (Interview with team leader, November 2011).

Consequently, improvement suggestions are taken more seriously when proposed by operators, and the perceived importance of solving a given issue therefore depends on whether or not the person is a permanent worker at the zone.

According to Wenger (1998), being a person entails reconciling different forms of membership, as all individuals belong to several communities of practice. In this case, the maintenance workers are a part of both the social configuration within the maintenance unit and the configurations at the respective production zones. Identities are not something that could be turned on and off, as it should be viewed as a nexus of multi membership (Wenger, 1998). Consequently, fundamental aspects of the maintenance workers identities relate to their sense of multi membership as well as their particular function at the case company. These constitute Wenger's (1998) indicator 8; mutually defining identities. In accordance to Wenger's (1998) indicator 14, the sense of multi membership makes the maintenance workers share a unique perspective: The maintenance workers have both the insight of the perspectives of the maintenance configuration itself, but also on what the operators and other blue-collar workers at the plant face in everyday life. Although several of the commonalities among members of this configuration are unspoken, there are also certain agreements that are made explicit. An example is the passivity regarding suggestions for how to improve the Lean Enterprise system, where one of the maintenance workers explained that this was not something he had thought of as they are concentrating on what they are "supposed to do" (cf. 5.1). This implies that instead

of contributing to the overall continuous improvement work at the factory, they would rather focus on fulfilling their specific work tasks. In this sense, their experience of being off-centred at the production zones contributes to the common perception of what is the most important. Although their work involves individually performed tasks, maintenance workers that are placed at the same production zone are engaged in working together, in line with Wenger's (1998) indicator 2:

I work mostly for myself, but I also cooperate a lot with for instance the maintenance mechanic (Interview with maintenance electrician, October 2012).

Working together across professions like in this example; the mechanic and the electrician, is assumed to be quite beneficial. This is especially due to the wide range of complex problems to be solved at the factory, which makes the work tasks challenging:

The thing is that, in the job that I've got, there is nothing you can know with 100% certainty (Interview with maintenance electrician, October 2012).

Another important factor for the maintenance workers is the time aspect, as they need to be able to react and adapt to sudden challenges, and the maintenance workers are always on alert due to the requirements inherent in the work tasks:

If it is something urgent, we must fix it as soon as it happens (Interview with maintenance mechanic, October 2012).

I can in a way sit here now, but if something breaks... We're partly in a state of preparedness, partly preventive, partly acute (Interview with maintenance electrician, October 2012).

Always being prepared to solve problems on behalf of others implies that issues must be addressed rapidly also within the maintenance unit; hence indicator 5 is also identified.

8.3.2 Maintenance workers - a community of practice?

From the total number of indicators that a community of practice has formed (cf. 8), indicators 1, 2, 5, 6, 8, and 14 are present within the social configuration of maintenance workers. The distribution of the identified indicators is illustrated with respect to the three dimensions in figure 6.

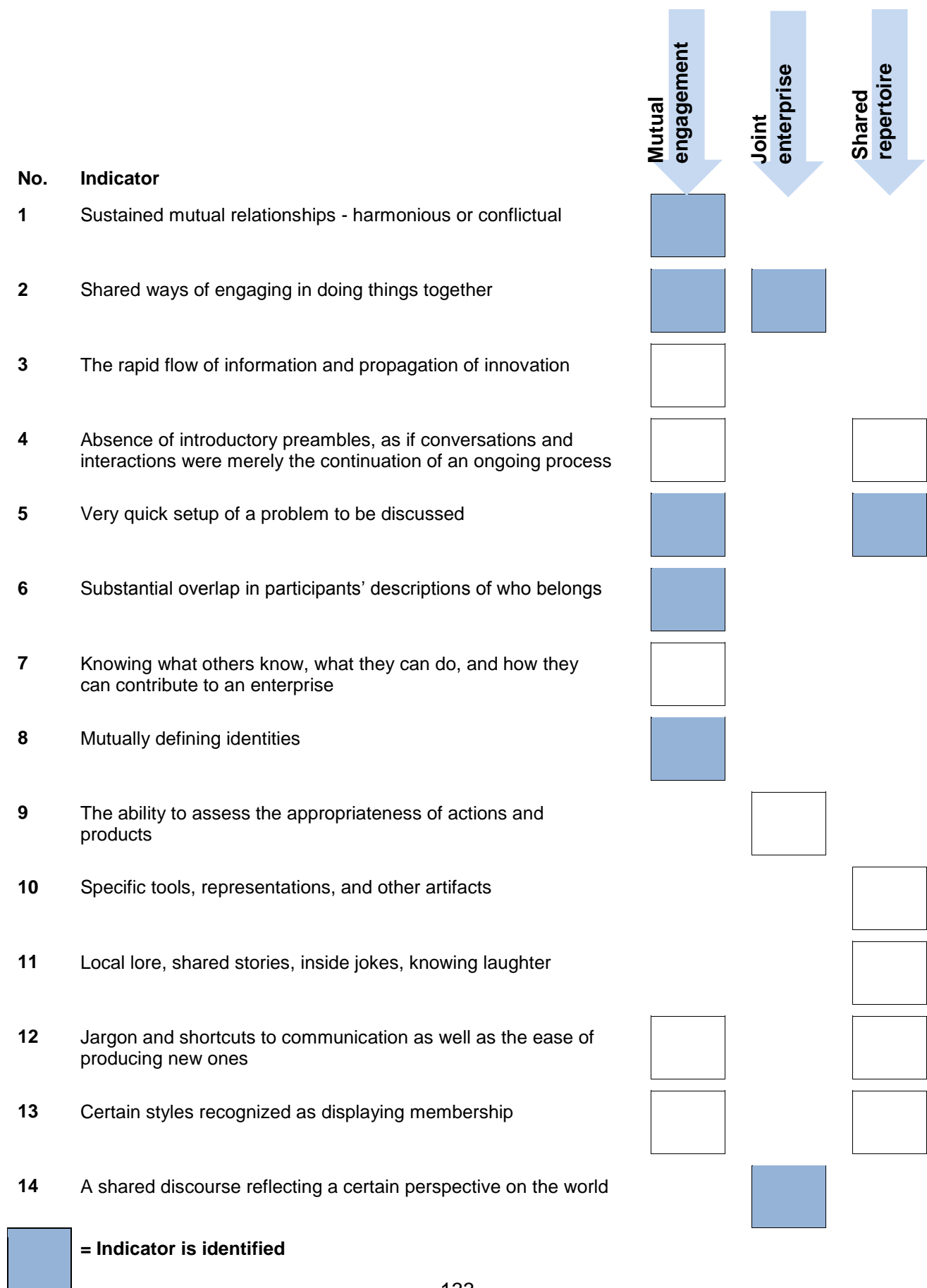


Figure 6: Distribution of indicators within the social configuration of the maintenance workers (Framework A applied)

What the figure illustrates is that also the maintenance workers constitute a community of practice, since indicators are found in all three dimensions. The mutual engagement and the joint enterprise are represented by half or more of the possible indicators within these respective dimensions. Although the members have different professions and are placed to work in various zones, their identities are closely related to their common function within the case company; as maintenance workers. The strong identity is a result of these employees' function being perceived as particularly important, and the duality in them belonging to the maintenance unit, as well as the different production zones. Their identities, relationships and shared ways of interacting make up the mutual engagement and the joint enterprise of this community of practice. Besides the quick setup of problems to be discussed, no clear indicators of a shared repertoire were identified. A possible reason could be the differentiated work tasks and places, leading to the face-to-face interaction between maintenance workers being somewhat sporadic. In conclusion, what characterizes this community of practice is clearly their mutual engagement and joint enterprise.

8.4 Comparison of communities of practice - community of practice profiles

Communities of practice cannot be considered in isolation from the rest of the world. Neither can they be understood independently of other practices (Wenger, 1998). The preceding sections in this chapter have introduced a selection of three social configurations within the case company. By applying Framework A (2.6.4), these were all identified as communities of practice on the basis of present indicators, as previously illustrated in figures 4 to 6. Framework B (cf. 2.6.5) is now used to generate the respective community of practice profiles, hence enabling a structured comparison of the three. These are illustrated in figure 7.

	Mutual engagement	Joint enterprise	Shared repertoire
Blue-collars	Medium	Low	High
Department X	High	High	Medium
Maintenance workers	High	High	Low

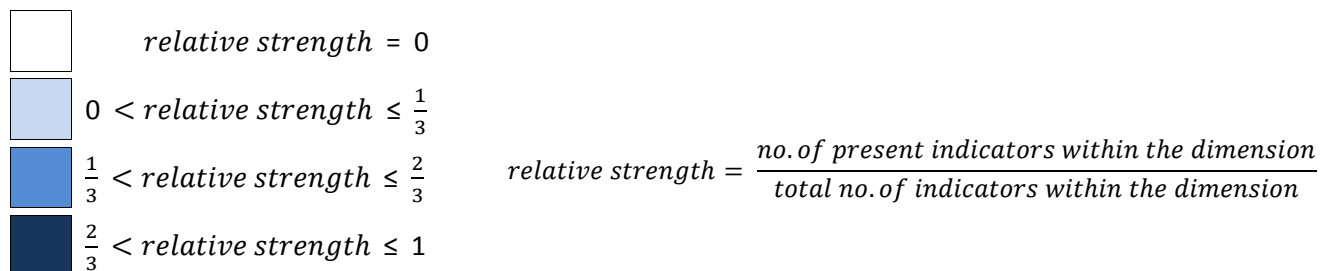


Figure 7: Comparison – Community of practice profiles (Framework B applied)

When considering the three communities of practice as an aggregate, mutual engagement is the most prominent of Wenger’s (1998) three dimensions. The sense of being a part of, and identifying with, a given group of people is a distinct characteristic of all three communities of practice. Wenger and Snyder (2000) state that some communities of practice can stretch across divisional boundaries, as is the case of both the blue-collars and the maintenance workers, whilst others can exist entirely within a business unit. The geographical proximity of Department X might have caused the mutual dependence being more eminent in this community of practice as it enables perpetual face-to-face interactions.

Face-to-face interactions also seem to be an important aspect with regards to the third dimension; the joint enterprise. The blue-collar community of practice is the one with the least amount of indicators of a joint enterprise out of the three identified communities of practice. This might be a consequence of the large diversity of this social configuration, as thoroughly described in section 8.1. In contrast, the maintenance workers all fulfil the same function within the case company and also have the possibility to interact as a group. Finally, Department X, which benefits from its geographical proximity and small size, is the community of practice with the most prominent joint enterprise.

Considering again the three communities of practice as an aggregate, the shared repertoire is the weakest of the represented dimensions. Further on, the maintenance workers have got the weakest community of practice profile of the three with regard to the shared repertoire. However, these workers can also be perceived as members of the blue-collar community of practice (cf. 8.1), and for this reason share the repertoire of operators and other blue-collarers. The dimension of shared repertoire consists of both reificative and participative aspects (cf. 2.6.2). Although the profiles of the blue-collarers and Department X appear equal within this dimension, the preceding analyses have revealed that their repertoire grows from partly different aspects: On the one hand, the blue-collarers repertoire is mainly reificative. Department X, on the other hand, has got a shared repertoire that involves highly participatory aspects, as indicator 4 and 5 concern conversations, discussions, and interactions.

The comparison of the three profiles indicates that, with its strong relative strength of all dimensions, Department X stands out as the most distinct community of practice. In fact, out of the three identified communities of practice, Department X is has got the strongest representation of indicators within all three dimensions.

8.5 Concluding comments

Communities of practice are combinations of three dimensions; a mutual engagement, a joint enterprise, and a shared repertoire (cf. 2.6.2). The existence of these dimensions is thus the criteria for a social configuration to be identified as a community of practice. By applying Framework A on the blue-collarers, Department X, and the maintenance workers respectively, indicators within all the three dimensions were identified. The analyses in this chapter have thus confirmed that the three selected social configurations can all be treated as communities of practice.

Using Framework B, the nature of the three social configurations was illustrated as community of practice profiles. By considering the three profiles as an aggregate, the findings show that mutual engagement is the most prominent dimension. This can partly be explained through the strong sense of identity that characterizes all three of the communities of practice. This could be seen in relation to employees not identifying with the MNC as discussed in an earlier chapter (cf. 7.3.1). The comparison further reveals that Department X stands out as the most distinct

community of practice, due to its strong relative strength of all dimensions. Geographical proximity is not alone sufficient to develop a practice. However, Department X has got the strongest overall community of practice profile, which could indicate that geographical proximity is of great importance.

The research question aims to explain the difficulties in the implementation of the management concept from the headquarters to the community of practice within the case company, and one of the identified communities of practice is therefore chosen for further analysis. As Department X appears the most distinct, the analyses in chapter 9 and 10 are based on this community of practice. Additionally, tacit knowledge plays an important role in the dynamics of communities of practice (cf. 2.6.1), and such knowledge could neither be verbalized nor observed at a glance (Nonaka & Takeuchi, 1995; Polanyi, 1966/2009); it must be experienced (cf. 4.1.2). Our ethnographic study of this particular unit (cf. 4.2.4) is therefore assumed to add to the strength of choosing Department X as the community of practice for further research.

Chapter 9:

DEPARTMENT X AS A COMMUNITY OF PRACTICE

The preceding analysis has revealed that there are a number of different communities of practice within the case company. Wenger (1998) introduced the concept of communities of practice, arguing that these are social configurations that have a mutual engagement, a joint enterprise, and a shared repertoire (cf. 2.6.1); the dimensions previously used in the analyses in chapter 8. More recent literature from Wenger et al. (2002), however, widened the perspective on communities of practice, providing a more practical approach to the topic. They argue that all communities of practice share a basic structure of three fundamental elements; a domain of knowledge, a community of people, and a shared practice (cf. 2.6.6), and that each community of practice is a unique combination of these. Understanding the nature and dynamics of a community of practice thus implies a comprehension of this unique combination. On the basis of the findings in section 8.2, the analysis in this chapter therefore aims to describe Department X through the three fundamental elements. This is done in order to assess important characteristics of the community of practice that must be understood before examining what happens as it is faced with the implementation of Lean Enterprise; an issue studied in chapter 10. This chapter therefore answers subordinate research question 5.

9.1 Domain of knowledge

The domain defines a set of issues that the members of the community of practice commonly experience (Wenger et al., 2002). As the group of people at Department X has worked together for decades, the members have developed strong mutual relationships (cf. 8.2.1). They all share a common interest in their job security, hence maintaining their jobs in an internationally exposed industry with increased competition from foreign low-cost producing actors. Throughout the time, the case company has toiled through economic ups and downs, implying changes in ownership and threats of job cuts. The subsidiary today forms one of the largest employers in the town, which is a industry society with long traditions. For this reason, a factory closure would not only affect the workers and their families, but also the town community as a whole. In this

sense, the members of this community of practice do not only focus on achieving the short-term production goals, but also on surviving in, and preserving, their work environment. Equally important is the workers' interest in maintaining their jobs within Department X in particular, as their identities to a large degree grows from belonging to this specific unit (cf. 8.2.1). Consequently, this sense of mutual accountability forms a basis of the domain of knowledge in this community of practice. By having developed an in-depth understanding of the domain, the members could all agree and decide on what really matters to them, and as Wenger et al. (2002) proposes; the domain could be of guidance for how to proceed in the future.

One example of future procedures is the issue of what to regard as the most important tasks to solve. The analysis has shown that most members of the community of practice show an attitude that implies that the most important to them is being able to "do their actual job" (cf. 8.2.1). Although half a year had passed since the initial implementation of the management concept at Department X, one of the operators stated that "things are the same as always" (Field notes, October 2013). Members identify themselves as merely operators; not change agents, and perceive the change initiative as merely "managements' business". As a consequence, they avoid taking part in the process, and even intentionally omit using the tools (cf. 8.2.1). In accordance to Stensaker et al. (2002), such reluctance to change is a common consequence of the BOHICA effect as it makes employees passive to change.

A fundamental part of their domain of knowledge regards old and rarely produced products, as opposed to others whose work mainly involves large batches of relatively new products. The example of figuring out how to proceed regarding a bumper that was rarely produced (cf. 8.2.1) showed that they knew that they had to talk to one of the most experienced operators. The operators are fully aware of who to ask when facing a particular problem, and the experienced operators would further recognize that this particular knowledge would be interesting for the others. The members are thus able to contribute with something which they know the others would also find highly relevant, without the co-workers time being wasted. This is in line with what Wenger et al. (2002) also describe; that the motivation to share this type of knowledge to the rest of the members could be explained by a commitment to a shared learning agenda. This is especially important regarding the issue of benefitting from tacit knowledge (cf. 2.6.1), as developing mutual knowledge requires a consideration of the interplay between the implicit and explicit knowledge (Jacobsen, 2012). Additionally, the case company is highly dependent of the

members' in-depth knowledge of such key manufacturing aspects, as these have traditionally remained unwritten (cf. 8.2.1). This could describe a source of power that this community of practice possesses with respect to the rest of the organization.

9.2 Community of people

The community of people includes those who care about the domain of knowledge (cf. 2.6.6). Wenger et al. (2002) argue that communities with fewer than fifteen members are “very intimate”. In this sense, the dozen workers at Department X form an intimate community. By working together through thick and thin throughout the years, the members have formed a shared identity as Department X workers. Sticking together as a group seems to have been important to cope with the hard times of under prioritization (cf. 8.2.1). Equipment with the former owner's logo is used without anyone noticing nor taking actions, and this is not only due to them not identifying themselves with the new owner specifically. The owner is perceived somewhat irrelevant as long as the jobs maintain the same. Over time, the members of the community have built a sense of common identity and history, making them see themselves primarily as Department X (cf. 8.2.1), and not as a part of the new owner - nor the previous owner in that respect. This has contributed to the members not being very open to input and changes from outside the community; resistance to interference that according to Wenger and Snyder (2000) is common due to the nature of communities of practice.

Some of the tools and techniques of Lean Enterprise are supposed to facilitate exchange of information between different shifts (cf. 5.2.1). While the other units are facing challenges due to communication between shifts, this is not an issue for the members of Department X. One of the aspects that distinguishes them is in fact that Department X only runs with one shift a day. By working during the same period of time, with the same people, day in and out, the workers interact regularly on the aspects they consider important. Such regular interaction helps the members to develop a shared understanding of the domain, and it also strengthens the relationship between the members. Working towards such common objectives has made them built trust, which is also important to facilitate knowledge sharing (Roberts, 2006).

The situation described in chapter 8.2.1, where one of the operators immediately stepped in and helped the other, certainly shows that the members of this community help each other out to the

benefit of the whole group. They thus seem to know that their efforts and contributions will come back to them someday. This initiative was not a response to an enquiry from the operator, but rather spontaneously without any form of verbal communication. Knowing each other well has naturally made it easier to ask for help and ask tough questions. This is important as knowledge of this community of people is highly embodied, and the fact that learning from each other requires an atmosphere of openness (Wenger et al., 2002). Similarly, as the members have developed certain knowledge on what the others know (cf. 8.2.1), it is easier to ask for help from the co-workers that they know can contribute to solving the problem with their expertise. As a consequence, the knowledge of the community of practice has become highly embodied. The fact that the operators are helping each other is also indicating a sense of accountability, not only for the production results, but also for each other's well-being. Consequently, this aspect of the community of people has contributed to these employees' high degree of autonomy (7.2.1). This was also in the case of the mid-level manager, who stated that he was there for the operators, and not the other way around (cf. 8.2.1).

Although common history and identity form through long-term interactions, Wenger et al. (2002) argue that it also encourages differentiation among the members of the community; which again facilitates "richer learning, more interesting relationships, and increased creativity" (p. 35). The members of Department X have all taken on different roles, both officially and unofficially. In terms of the first, two of the most experienced operators function as team leader and employee representative. Regarding the latter, each operator has a certain responsibility and sense of ownership for different products (cf. 8.2.1), although this is not formally stated somewhere; it is just the way it has evolved over time. For instance, one of the operators said that he preferred the repetitive tasks as he placed the value of being an expert on these specific operations higher than the drawbacks of the monotone work (Field notes, May 2013). In this way, the members also gain a status and reputation among the others, for instance regarding the issues of asking for help with specific products. Others, like the team leader, prefer to work with a wider range of products, making them more capable to step in wherever needed (Field notes, May 2013). The team leader's ability to see the operators' job from their point of view would give him internal legitimacy in the community, as Wenger et al. (2002) state is important. Although the team leader has got more autonomy than the operators, he is considered a full member of the community (cf. 8.2.1). Such incorporation of the team leader within the community was observed to be quite natural within the communities of blue-collar workers of the subsidiary.

Another interesting finding is the duality in the role of the mid-level managers at this specific unit. On the one hand, they can be considered members of this community of practice. As clearly stated by themselves (cf. 8.2.1), they identified as a part of the community through sharing the same repertoire of routines, words and ways of seeing the world. They are often present at the shop floor, they talk with the operators on a daily basis, and they frequently eat their lunch with the other members (Field notes, May 2013). These are some of the reasons why the mid-level managers are on a first-name basis with the operators, like other members of the community. On the other hand, they also act as part of the management group. This external leadership role is fundamental in order to the community to have influence on the factory management, but also to build credibility within the organization.

9.3 Shared practice

A practice is described by Wenger et al. (2002) as a “mini-culture that binds the community together” (p. 39), through a set of frameworks, ideas, tools, information, styles, language, stories, and documents (cf. 2.6.6). These practices indicate the set of the socially defined ways of doing things in the domain of knowledge, regarding both the tacit and explicit aspects (Wenger et al., 2002). The shared practice of the Department X already includes morning meetings where the team leader and one or both mid-level managers discuss the production plan and changes to it (cf. 8.2.1). There is a continuous flow of changes to this plan, and in general the members of Department X prefer to communicate verbally as this is assumed to be the most practical for achieving their work tasks. This is a practice that is contained in spite of management’s efforts to change it, as an example through establishing written work instructions. The example with the old, rarely produced bumper (cf. 9.1) also demonstrate how little is actually been documented in writing, although these problems occurred quite frequently due to the wide range of products. The information between the members flows informally, resembling an ongoing process. What is more, the jargon is being crammed with humour and sarcasm which is not something they, as opposed to an outsider, are likely to be offended by. This could be exemplified through the situation where one operator spontaneously stated that one of the others “can’t do anything right!” (cf. 8.2.1). Moreover, by using linguistic shortcuts in the everyday speech, they know how to present the information in the most useful ways. One of the best examples is the labels for the various racks for packing, which do not have logical meaning for the people outside the community (cf. 8.2.1). For the members, however, they

know the representation of each shortcut, as they all are familiar with the labels and the products they represent.

Another practice that characterizes this community is the ability to discuss and handle problems. The situation where the team meeting was delayed due to an error in production (cf. 8.2.1) indicates that all relevant functions are involved immediately to find a quick solution. Similarly, the mid-level manager stated that they have a long tradition for “jumping when told to” in order to handle the customer's requests (cf. 8.2.1). These are both examples that the practice of quickly addressing problems has become a shared mentality of the members' work life.

An advantage of having only shift is that all the members go to break together (cf. 9.2). Lunch and coffee breaks have become settings where the team leader keeps the other operators informed of any changes in the production plan, and where experienced issues are brought up for discussion (Field notes, May 2013). As a consequence of their mode of communication, these breaks function as fruitful settings of knowledge sharing, helping the members tackle upcoming issues.

Moreover, the operators know the work procedures by heart (cf. 8.2.1), and explicit instruction sheets have not yet become part of the developed practice within the community. As one of the operators eventually admitted that the work instructions could be quite helpful in some occasions (cf. 8.2.1), the members needed time to understand the benefits of the documentation. The initial preference for learning by doing could thus be another common factor of the members shared practice.

9.4 Concluding comments

The above sections have described a community of practice in which all three elements of Wenger et al. (2000); the domain of knowledge, the community of people, and the shared practice, are well represented. This is thus the description of the unique combination that forms this community of practice in particular. The domain of knowledge can be summarized as the members' interest in their job security, their clear perception of operators not being change agents, as well as their knowledge about old and rarely produced products, which has led to the members' strong commitment and responsibility towards the products.

As for the community of people, this element regards the fact that the members' identities are unrelated to the owner, and that they work only one shift a day which facilitates continuous interaction among all. Further, the members help and care for each other, they know what the other members know, and the community of people is also characterized by a high degree of embodied knowledge and autonomy. Finally, they take on different roles, and it is worth mentioning that the team leader and the two mid-level managers are considered members of this community of practice.

The shared practice of Department X is an ample set of ways of doing things. This set includes a verbally characterized way of communicating, linguistic shortcuts and humour, addressing and handling problems quickly, lunch and coffee breaks that function as arenas for knowledge sharing, in addition to the members' typical approach to learning by doing. The listed descriptions of the three elements all constitute important characteristics of Department X as a community of practice.

Chapter 10:

A COMMUNITY OF PRACTICE FACING A MANAGEMENT CONCEPT

In chapter 8 communities of practice were identified by applying Framework A (cf. 2.6.4); hence demonstrating the presence of the three dimensions which are required for being treated as a community of practice. Using Framework B (cf. 2.6.5), their community of practice profiles were then compared to each other (cf. 8.4). The community of practice of Department X appeared to be the most distinct one, and was thus chosen for further analysis. As it was necessary to understand the unique combination that this specific community of practice constitute, chapter 9 provided a description through Wenger et al.'s (2002) three elements; domain of knowledge, community of people and shared repertoire. Having done that, the characteristics of Department X are outlined. This has enabled an analysis of what happens when this community of practice, Department X, faces the management concept, Lean Enterprise, which is the aim of this chapter. In other words, the following analysis thus provide an answer to subordinate research question 6, which is done by applying Framework C (cf. 2.7).

10.1 Department X facing Lean Enterprise

Applying Framework C that was presented in section 2.7, the different content categories of Lean Enterprise and the elements of Department X as a community of practice are represented in the respective rows and columns of figure 8. As recently outlined in chapter 9, Department X constitute a unique combination of a domain of knowledge, a community of people, and a shared practice. The characteristics of each element are listed in the figure, in accordance with the findings in section 9.4.

Similarly, the management principles of Lean Enterprise are mainly identified as efficiency and continuous improvements (cf. 5.2.3), and these are also the main objectives to strive for in the case of Department X. The previous analysis showed that employees fundamentally agree with these principles, but that the problem lies in them not fully understanding the principles' connection to Lean Enterprise (cf. 5.2.3). The organizational vehicles for living by the principles

are visualizing, involvement and standardization (cf. 5.2.2). Generic techniques and tools that have been implemented as part of Lean Enterprise are 5S, SMED, the whiteboard with figures, and team meetings (cf. 5.2.1). As the latter two are the ones implemented at Department X, these are included in the figure and the following analysis. We have also seen that employees act indifferent towards the tools (cf. 5.2.1), and that the organizational vehicles are perceived unnecessary (cf. 5.2.2).

Each square in the matrix deals with the meeting between one of Wenger et al.'s (2002) elements and one of Lillrank's (1995) content categories, enabling a structured analysis of the occurring dynamics as Department X faces Lean Enterprise. Figure 8 illustrates the application of Framework C to the specific case. The numbers represent the respective analyses, which are outlined after the figure. Finally, to answer subordinate research question 6, concluding comments in section 10.2 provide the overall features of the analyses of this chapter.

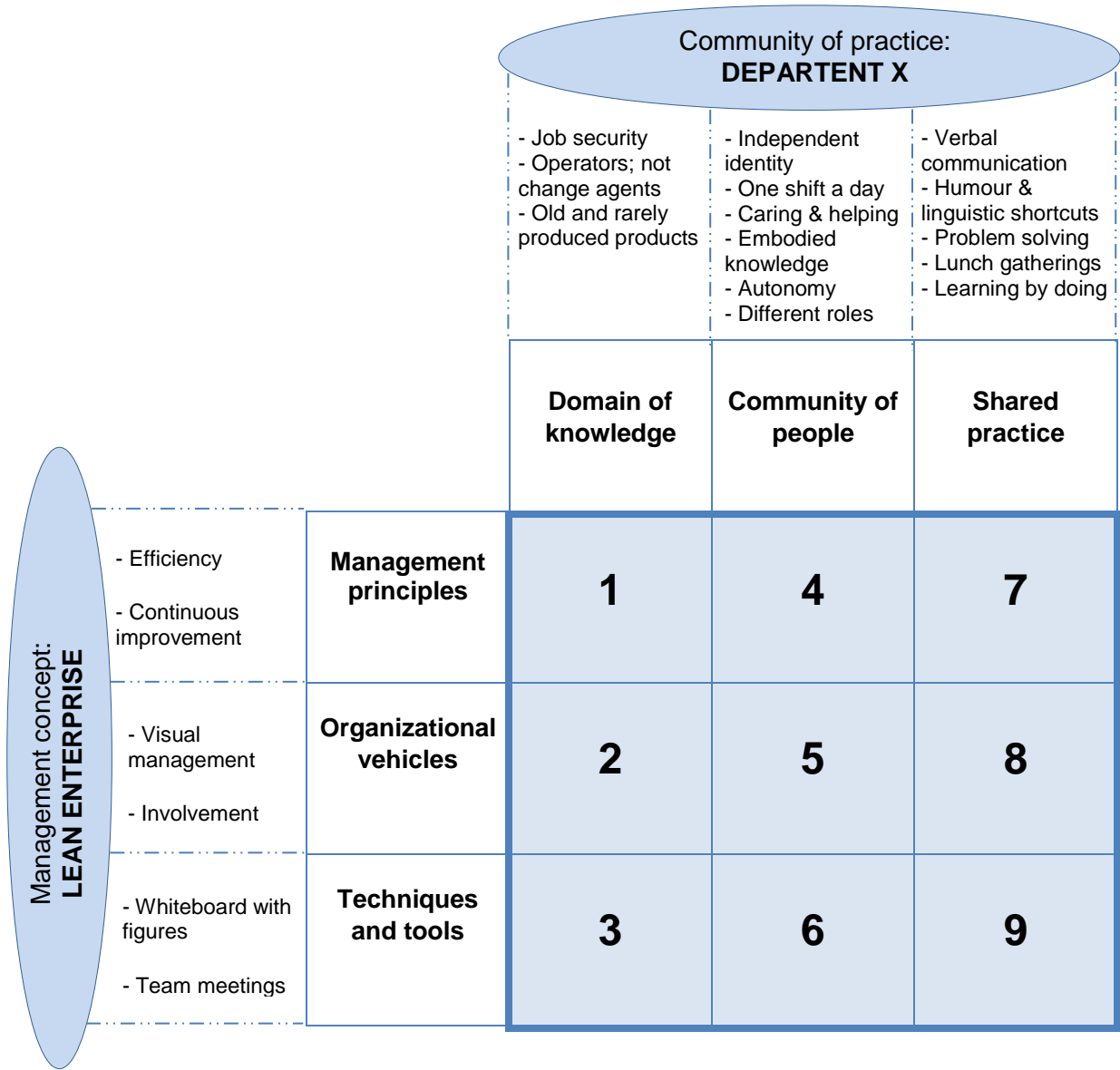
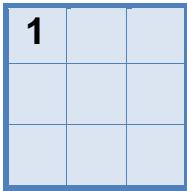
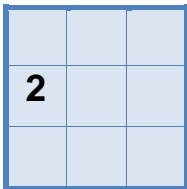


Figure 8: Department X facing Lean Enterprise (Framework C applied)



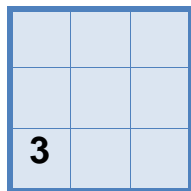
The domain of knowledge and the management principles

As the community of practice's domain of knowledge involves the interest in keeping their jobs within the company and the unit in particular (cf. 9.1), members of the community of practice seem to realize that they have to work smarter to compete with others in the market. For this reason, continuous improvement is assumed to be perceived as an important means to ensure such job security in the long-term run. However, Lean Enterprise is considered a system that facilitates improved efficiency in large scale production (cf. 5.2.3). For this reason, the members are in risk of perceiving the concept as incompatible with Department X's domain of old and rarely produced products in small batches (cf. 9.1). Rather than being bothered with what they perceive as management's change initiatives, the members tend to focus achieving the production goals; hence "doing their actual jobs as operators" rather than acting as change agents (cf. 9.1).



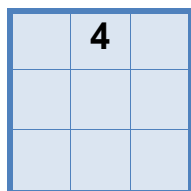
The domain of knowledge and the organizational vehicles

Through the members' in-depth understanding of their domain, being aware of how to best approach production in Department X has become part of the knowledge of the community of practice. Due to distinctive character of this domain, the members do not perceive organizational standardization to fit with their department. The main reason is that they meet the goals of production through a commitment to a shared learning agenda where knowledge from experience is freely shared (cf. 9.1). In this way, the members are truly engaged and involved in aspects concerning their work. This leads to a misfit between the domain and the presumptions by Lean Enterprise that there is a lack of involvement (cf. 5.2.2). The members are used to being involved in decision making, as they truly care about, and identify with, this department. They thus already have a desire to contribute with their knowledge and skills to preserve the work environment.



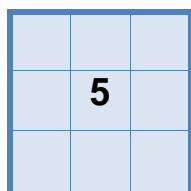
The domain of knowledge and the techniques and tools

The focus on doing what is considered the actual job and the knowledge of the distinctive characteristics of their production (cf. 9.1), have made the members establish their own way of operating, which involves the operators traditionally not attending meetings. This has led to the new team meeting being perceived as unnecessary. Further, the shared learning agenda (cf. 9.1) facilitates knowledge sharing and continuous evaluation of performance. This might be one of the causes that the members of the community of practice do not understand the utility value of the new tool for measurements; the whiteboard displaying deviations (cf. 5.1.2). In fact, this causes an opposite and unwanted effect, as the tools and techniques are rather perceived as control mechanisms (cf. 6.2.2).



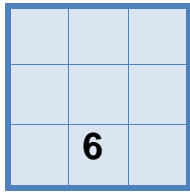
The community of people and the management principles

Knowing what others know and continuously helping each other out could be perceived as a way on continuously improving. In this way, there is not a distinct incompatibility between the community of people and this management principle. However, the people of this community strongly identify with this unit in particular (cf. 9.2), which contributes the revealed lack of identity with the multinational owner (cf. 7.3.1). When the members do not identify with the corporation, there is also a risk of them not identifying with Lean Enterprise, which may complicate their understanding of the underlying principles of this management concept.



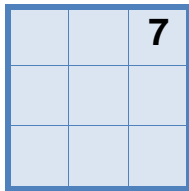
The community of people and the organizational vehicles

The members constitute a small community of people, with a high degree of autonomy, who all know the other members and how they could contribute (cf. 9.2). For this reason, enforced and formalized means of involvement is not perceived as necessary. Furthermore, the members of this community of people all work closely together every day, interacting, helping and caring for each other (cf. 9.2). Formalized means of information sharing through visualization hence serves no need. As the community of people includes not only the team leader, but also the two mid-level managers, vehicles for improving information sharing and communication between the hierarchical levels are also perceived unnecessary.



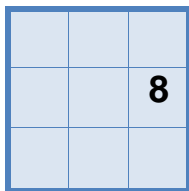
The community of people and the techniques and tools

One of the things that characterises the community of people at Department X is the members' resistance to interference from the outside (cf. 9.2). The team meetings and the use of the board were not implemented as a response to agreed-upon challenges in the community of practice, and instead of being welcomed by the members; these tools became objects of interference. The nature of the community of practice in itself thus appears to be an obstacle to the implementation of the given techniques and tools. This resistance to external interference could partly also be a result of the previously analysed BOHICA effect (cf.7.2.2). Moreover, the dual role generally describing the mid-level managers of Department X (9.2) has also become apparent in the process of implementing Lean Enterprise. Subsection 6.2.3 described a situation within Department X, where the figures representing productivity (cf. 5.1.2) were passively coloured green every day, despite the issue of not having found a suitable way to measure this objective. What is more, the daily measurements of all objects remained within the unit, and were not reported to the plant management (cf. 6.2.3). The mid-level managers in Department X can in this way be identified as becoming "buffers" between the community of people and the management which represents the management concept. Becoming a buffer is not unusual for a mid-level management position, as it represent a position in which different interests meet (Doede, 2013). What is interesting is also the type of hypocrisy demonstrated; the figures are being coloured, the team meetings are held, and written work instructions have been developed (cf. 8.2.1), although none of these actions were performed as intended by the management. At the same time, by letting the operators work as usual, the mid-level managers could be seen as protecting the community of people from these practices. Consequently, the mid-level managers are found in the tension between the management, representing Lean Enterprise, and the community of people in which they are perceived as members. This role could be conceptualized as a "buffer of hypocrisy".



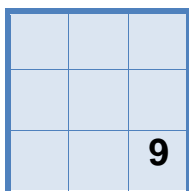
The shared practice and the management principles

The members of this community of practice have developed a shared practice of quickly addressing problems (cf. 9.3). By dealing with issues immediately and involving all necessary parts at an early stage, employees at Department X show a behaviour that values efficiency, which is a management principle of Lean Enterprise (5.2.3). Similarly, members rely on each other and share knowledge as a way of improving on a daily basis (cf. 9.3), which is line with the Lean Enterprise's principle of continuous improvement (cf. 5.2.3). Consequently, the shared practice at Department X and the management principles of Lean Enterprise are not incompatible or conflicting in any obvious way.



The shared practice and the organizational vehicles

As problems and sudden changes are handled immediately, visual management as a basis for problem discussion is not needed. Verbal communication and informal ways of information flow and knowledge sharing are already present (cf. 9.3). For this reason, the members are already aware of important messages and their performance level, which supports the assumption that visual management is not required. Moreover, existing practices like lunch and coffee breaks serve as arenas for discussion and involvement for the community of practice (cf. 9.3). For this reason, involvement as an organizational vehicle of the implemented concept is not considered necessary.



The shared practice and the techniques and tools

There are already existing practices within the community of practice that in ways collide with the tools and techniques of Lean Enterprise. Firstly, morning meetings are already part of the shared practice, implying that the newly introduced team meetings do not serve any needs at this unit. Secondly, as operators and mid-level managers already regularly meet, for instance at lunch and coffee breaks (cf. 9.3), the use of the whiteboard with the figures is not experienced as improving communication, neither between the operators, nor across hierarchical levels. Thirdly, the shared practice of quickly assessing problems and continuous verbal communication (cf. 9.3) implies that they do not need a specific tool for visualizing deviations.

10.2 Concluding comments

This chapter has examined the three elements of the community of practice with respect to the three content categories of Lean Enterprise, respectively, and the analysis has revealed interesting findings within all nine combinations. Returning to chapter 5, it revealed how the ignorance of the techniques and tools is a general issue in the implementation of Lean Enterprise at the case company. So is the scarce understanding of the management principles being a part of this concept; principles that are, for most part, compatible with the attitude of employees. The analysis in the current chapter has shown that these aspects are also prevailing within all three elements constituting the Department X community of practice.

Concerning the elements of the community of practice, what seems the most prevailing is the fact that current shared practices collide with the organizational vehicles and the techniques and tools that are being implemented as part of Lean Enterprise. However, that these are the most prevailing might be due to the fact that physical practices and tools are the most easily detected. Further, members of Department X clearly resist the implementation of Lean Enterprise, both as a result of their strong identities as “Department X”, and the fact that the mid-level management serve as what can be conceptualized as a “buffer of hypocrisy”, which are findings within the element of community of people. In this way, the operators in alliance with the mid-level managers have contained pressures towards the management concept; hence supporting the reproduction of the community of practice. What is more, the enforced types of work procedures, as part of Lean Enterprise, strongly contrast to the high level of autonomy and the embodied knowledge developed on the shop floor. With regard to all three elements, and the domain of knowledge in particular, many of the challenges seem to result from a poor assessment of existing assumptions and perceptions within the community of practice. Consequently, difficulties could have been avoided if sufficient effort had been put forth in making the members fully understand the management concept, and vice versa; making the management implementing Lean Enterprise understand the community of practice.

Chapter 11:

FINAL CONCLUSIONS

The research question of this thesis is formulated as follows: “What are the possible explanations for the difficulties in implementation of Lean Enterprise from the headquarters to a community of practice within the Norwegian recipient unit of the multinational corporation?” (cf. 3.1). For reasons of simplification and structure, six subordinate questions were derived from the main research question. These have been addressed in chapter 5 to 10, respectively. In chapter 5, it was found that Lean Enterprise is not merely a passing fad or fashion, and that the complementarity of the content categories of the concept has not been not sufficiently considered in the cross-border transfer. Chapter 6 explained how the chosen strategy has complicated the implementation, as essential precautions when using a top-down approach have not been taken. The analysis of chapter 7 demonstrated how not only country-level differences were important when considering the transfer of Lean Enterprise within the MNC as the implementation is contextually embedded. Chapter 8 identified three social configurations within the case company which can be treated as communities of practice. The comparison of these further revealed that Department X stands out as the most distinct community of practice, and was for this reason selected for the analysis in the following two chapters. The characteristics of Department X were thoroughly examined in chapter 9 in order to gain an understanding of the unique combination of elements that forms this community of practice. Finally, by examining these elements of Department X with respect to content categories of Lean Enterprise, chapter 10 revealed multiple tensions, where challenges often seemed to result from a poor assessment of existing assumptions and perceptions within the community of practice. The examinations of the six subordinate questions together enable an answer to the comprehensive and complex main research question. By making connections between the analyses, five main findings can be drawn from this study. These are articulated in the following analysis.

The first of these findings regard the miss-fit between the concept and the implementation. Despite the fact that Lean Enterprise attempts to facilitate involvement, employees are not

involved in the process of implementing the concept; the workers are not involved in decision-making on what Lean Enterprise should be for their respective units, or in how they should go about implementing it. What is more, the concept also tries to facilitate communication, although the essence of Lean Enterprise is not communicated to sufficient degree. Formalized team meetings are implemented to improve communication between employees, but there is a scarcity in communication when it comes to bringing forward the intention and importance of implementation. In short terms, it is somewhat contradictory that Lean Enterprise is supposed to improve both the communication and involvement in the everyday business, but at the same time, these factors seem to be neglected in the implementation of the management concept; hence creating an ironic relation between Lean Enterprise and the implementation.

Moreover, Lean Enterprise seems to assume scarce involvement and communication, as it offers a fixed set of formalized tools to cope with it. This assumption is in many ways a misapprehension, as the community of practice is characterized by a high degree of involvement and continuous verbal communication. This is one finding implying that there is an incompatibility between the management concept and the community of practice. Nevertheless, this case has shown that negative responses by employees are, to a large extent, consequences of the way the concept is being implemented. The top-down approach to change is not entirely incompatible with the high degree of involvement characterizing the Norwegian employment, the case company in general, and more specifically; this community of practice. However, it requires focus on facilitating local adjustments, implying that involvement and the use of local management as essential change agents are key factors. Since this has not been done, the members of the community of practice act by disclaiming responsibility for the concept; imposing the liability on management. Consequently, problems derive from the management omitting to assess certain precautions which are essential when using a top-down approach. In addition, the employees' perception of Lean Enterprise clearly showing signs of being from abroad might also be mistaken, as argued in the analysis of the contextual embeddedness. This perception has neither been addressed by management. For this reason, understanding the employees' responses is crucial, as "no change can occur without having willing and committed followers" (Bennis, 2000, p. 117).

As just argued, the role of the local managers is essential for successful implementation when using a top-down approach. At Department X, the role of the mid-level managers has proven

especially important. On the one hand, due to their membership in the community of practice, these leaders have gained throughout knowledge of the operators' attitudes and perceptions aware of the existing change fatigue. On the other hand, they also represent the management and the transfer coalition, and are thus responsible for progression of the implementation of Lean Enterprise at the unit. As they represent both parties, mid-level management should, assumingly, be the best change agents for implementing Lean Enterprise in Department X. What is seen, however, is that the way this dual role is handled creates difficulties. The mid-level managers superficially support the implementation of Lean Enterprise by making it look as if the system is used as intended. At the same time they enable community of practice reproduction in letting the operators ignore the concept. Moreover, they fail to exert an effort on behalf of the headquarters, and they also fail to communicate the essence and importance of Lean Enterprise to the community of practice. In this way, the mid-level management serves as a "buffer of hypocrisy". Consequently, in spite of the mid-level managers' good intentions, their behaviour contribute to difficulties both for the upper management trying to implement the system, and for the operators being faced with it.

As a consequence of the mid-level management functioning as a "buffer of hypocrisy", the case company is in risk of unconsciously settling with Lean Enterprise being only superficially implemented within this community of practice. The techniques and tools of the concept are implemented to a certain degree, although not used as intended. For this reason, little symbolic meaning to the practice and identity with these tools has been created among the members. As the employees are not aware of the connection between the tools and techniques and the underlying management principles of Lean Enterprise, the practices are not yet "infused with meaning", as Kostova (1999) argues is a key factor for success of such transfer. It is thus found is that practices are implemented, but not institutionalized. It can therefore be argued that the use of elements of Lean Enterprise is not in alone a confirmation of a successful implementation.

What is further an interesting finding is the fact that Department X as a community of practice in itself has become an obstacle to the implementation of Lean Enterprise. This statement can be accounted for by addressing the members' inherent identities as "Department X" and lack of identity with the parent company providing the concept. The latter is, in fact, a common issue within the case company as a whole. In accordance with literature which states that

communities of practice often resist interference from the outside, this study has shown that Department X strongly withstands managements' efforts to transfer Lean Enterprise. This is especially evident through the experienced BOHICA-effect. Among the contributors to this resistance is thus change fatigue as a result of repeated change efforts and changes and violations to well-functioning existing practices. An important characteristic of the Norwegian employment, the case company, and this specific community of practice is the high level of autonomy. This, together with the highly embodied knowledge of Department X, has caused the perception that outsiders do not possess the necessary understanding of their work and needs. Repeated one of the main findings from the previous chapter; difficulties could have been avoided if sufficient effort had been put forth in making the members fully understand the management concept, and vice versa; making the management, which is implementing Lean Enterprise, understand the community of practice.

The conclusions can thus be summarized as follows:

- **Miss-fit between concept and implementation:**

The concept attempts to facilitate involvement and communication, however, employees are not involved in the process of implementing the concept, and the essence of Lean Enterprise is not communicated to a sufficient degree.

- **Wrong assessment of the employees' responses:**

The negative response is not only a result of the concept in itself, but also of the way it is being implemented.

- **Problematic role of mid-level management:**

There is a presence of a "buffer of hypocrisy".

- **Lean Enterprise implemented, although not institutionalized:**

The use of elements of the management concept is not alone a confirmation of a successful implementation.

- **The community of practice in itself is an obstacle to interference from the outside:**

Department X withstands the implementation of Lean Enterprise.

Chapter 12:

LIMITATIONS AND GUIDELINES FOR FURTHER RESEARCH

An important limitation of this thesis regards the selection of theory in the literature review. It has not been possible for us, as researchers, to gain command of the total range of theories that could contribute to understand the contemporary phenomenon. The theoretical fields of organizational change, management concepts, multinational corporations and communities of practice are all extensively represented in existing literature, and we have thus focused on the contributions that we have found the most relevant for our specific case. Further, this master thesis describes a contemporary phenomenon in a single company. This case study is thus a concrete example on how a management concept is perceived when implemented within a MNC. Due to the uniqueness of the case, the findings do not provide conclusions applicable for communities of practice at recipient units within MNCs in general. In other words, a similar study in other corporations could lead to different results. For more detailed explanation regarding generalizability and other methodological issues, see the discussion provided in chapter 4.

When it comes to further research, another approach to the community of practice aspect of this thesis could have been to analyse more than one community of practice with regard to the management concept. This could have revealed interesting variations in the experienced difficulties with regard to the characteristics of the respective communities of practice. Just the one community of practice was selected for addressing the main research question in this thesis, due to limitations regarding the length of the report. Similarly, further research on the implementation of Lean Enterprise could be performed in collaboration with the case company, as the revealed difficulties are expected to persist if no action is taken. This research has also contributed to the literature in form of three frameworks for identifying communities of practice (cf. 2.6.4), comparing communities of practice (cf. 2.6.5), and finally, examining communities of practice facing management concepts (cf. 2.7). Although these were initially developed for use in the case study which examines a contemporary phenomenon in a single company, these theoretical frameworks are considered useful for other studies on similar issues. Further research could thus seek to improve or further develop these frameworks.

Chapter 13:

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