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Managing paradoxes, dilemmas, and change: a case study to apply the Yin Yang wisdom in Western organizational settings

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Abstract

Purpose - Drawing on Fang's (2012) Yin Yang theory of culture while taking up the roadmap proposed by Li (2016) for applying the epistemological system of Yin Yang balancing to complex issues in management research, in general, and to paradoxical issues, in particular, this paper sets out to explore how organizations and individuals in the West can balance cultural paradoxes and manage culture dilemmas through the lens of Yin Yang wisdom.

Design/methodology/approach - The paper is based on a qualitative case study. Data is gathered through interviews, documents, and field observations in four subsidiaries of an Italian insurance MNC and were analyzed according to the three parameters, i.e., situation, context, and time (Fang, 2012).

Findings - Our findings show how integrating and learning from seemingly opposite cultures and sets of values lead the organization and individuals to balance cultural paradoxes and manage cultural dilemmas effectively. With regards to *situation*, we find that both organizations and customers choose the most relevant value(s) to take advantage of during specific events or under certain circumstances, and that different value orientations can coexist. As for *context*, we show that organizations can adapt their values either through suppression and/or promotion, which can foster individuals to find new balance within the paradox. In terms of *time*, we show that the process of learning from other cultures over time can play a role in the shifting of people's and organizations' choices of attitudes and value orientations.

Originality/value - The paper suggests the relevance and usefulness of adopting Yin Yang wisdom to uncover the dynamic process of cultural learning in Western scenarios.

Keywords Cultural paradox, Culture dilemma, Organizational culture, National culture, Yin Yang balancing

Paper type Research paper

Introduction

This paper presents an embedded case study aiming to investigate whether organizational and national cultures mutually influence each other, how they do so, and how this process of reciprocal learning may encourage organizations and individuals to balance cultural paradoxes and manage cultural dilemmas. For this study, Yin Yang, an East Asian wisdom, is adopted as the lens through which Western national and organizational cultures are examined. More specifically, the Yin Yang worldview and epistemological system (Fang, 2012; Li, 2016) is found to be the most appropriate system with which to make sense of cultural learning and to reframe the paradox that originates from the coexistence of apparently opposite values and behaviors. The Chinese philosophical tradition of Yin Yang supports the reconciliation of "opposing voices" (Chen, 2002). Instances of these "opposing voices" can be found in nature, as well as in most human expressions, allowing the Yin Yang thinking to be applied to the study of various phenomena across multiple disciplines. For example, the relationship between males and females has been explained as one in which opposites complete each other: male having more *Yang* qualities (being more assertive and protective) and female having more *Yin* qualities (being more conciliatory and nurturing) (Ortner, 1972). Food consumption has also been looked at through Yin Yang lenses: following the Yin Yang philosophy, foods can be divided into more *Yin* or more *Yang*. Yin foods tend to be refreshing and to provide water to the body;

Yang foods have heating and drying properties. By eating both types of these opposite foods, people can make sure to have optimal balance in their bodies, and, ultimately, good health (Ludman & Newman, 1984). This principle of the union of the opposites is very useful when applied to the study of business organizations, as the case study object of this study exemplifies.

The case study involved four subsidiaries of an Italian insurance multinational corporation (MNC), each of which is located in a different area of Europe. Data was gathered through interviews, documents and field observations, and was analyzed according to the three categories in which, according to Fang (2005-2006, 2012), culture – national, local, or organizational – is embedded in situation, context and time. Understanding culture in a contextual/relative way has also been proposed recently in the framework "Relative Values and Moderated Behaviour" (the ReVaMB model, see Baumann and Winzar, 2017) which suggests that one has to "consider the moderating role of the context in which values are allowed to become manifest" (p. 41). This study heeds these calls to look at culture with contextual and situational lenses to reveal that a variety of processes are activated when organizational and national cultures intertwine. In particular, organizations and individuals can adapt their value portfolios according to specific situations, context requirements, and changes over time, thus making sense of paradoxes and cultural dilemmas. The paper is structured as follows: the following section provides a brief overview of the theoretical framework of this study, in an attempt to explain why East Asian wisdom was chosen as the point of departure for an analysis of Western values and behaviors. Next, the paper describes the methodology and data sources used for the case study, and then moves on to the analysis of data and the findings arising from it. In the concluding section, we discuss the limitations of this study and the need for further research.

Exploring Western cultures through the lens of East Asian wisdom

Over the past few years, interest in East Asian philosophical wisdom as inspiration for theory building to cope with the increasing paradoxes in today's globalized business world has been on the rise (Fang, 2012; Fang *et al.*, 2017; Li, 2012; Luo and Zheng; 2016, Mattsson and Tidström, 2015, to mention a few). Western literature does not adequately comprehend East Asia's traditions, approaches and performance. For example, it was only recently established that when competitiveness and workforce performance are compared (Asia vis-à-vis the "West"), three Western countries (Germany, UK, USA) cluster together with significantly lower performance levels than China and South Korea (Baumann *et al.*, 2016a). In education, the East Asian cluster (China, Japan, Singapore, South Korea, and so on) again significantly outperforms Western and other clusters (Baumann and Krskova, 2016). East Asian philosophies are arguably the drivers of such strong performances. Among the East Asian ideologies, philosophies and other elements of wisdom, Yin Yang is considered as the worldview and epistemological system that can best foster an understanding of recent phenomena by reframing the notions of paradox, opposites, and balance (Fang, 2012; Li, 2016; Luo and Zheng, 2016).

According to the Yin Yang philosophy, the universe and all its phenomena are shaped by the continuous interplay of Yin and Yang, two opposite yet interdependent-cosmic energies. Yin is associated with traditionally female traits such as softness, femininity, darkness, and submissiveness, while Yang represents traditionally male traits such as strength, energy, masculinity, and dominance. The co-dependency of these dual forces works in such a way that, as Ji *et al.* put it (2001, p. 450), "[w]hen Yin reaches its extreme, it becomes Yang; when Yang reaches its extreme, it becomes Yin. The pure Yin is hidden in Yang, and the pure Yang is hidden in Yin".

Fang (2005-2006; 2012) suggests that Yin Yang as a philosophical thinking helps conceptualize culture at the national, local, organizational and individual levels. In his words, in

the same way that Yin and Yang coexist and influence each other, apparently "paradoxical value orientations coexist in any culture" and "give rise to, exist within, reinforce, and complement each other to shape the holistic, dynamic, and dialectical nature of culture" (Fang, 2012, p. 25). Fang's theory unveils the intrinsically paradoxical nature of any culture, in which apparently contradictory values and behaviors can coexist, and where a "greater tendency toward one end of a bipolar dimension does not preclude the espousal or exhibition of characteristics at the opposite end. […] Culture is therefore not a situation-free, context-free, or time-free construct, but rather is embedded in situation, context, and time" (2012, p. 35). This dynamic vision of culture reflects the Chinese view of paradox as the "co-existence of mental opposites that are contradictory yet interrelated" (Li, 2016, p. 6) in a constant process of dynamic balancing which strives to reach harmony in duality. "In short, the Yin Yang approach emphasizes the interdependence of opposites as compared to the perspective of the independence of opposites in the classical Western approach" (Fang *et al.*, 2017, p. 559).

Fang (2012) put forward four propositions (see Table 1) that define the essence of the Yin Yang theory of culture. According to the first proposition, potentially paradoxical value orientations can coexist in the same culture, embedded in three main parameters: situation, context and time. Fang's assertion is, therefore, that a variety of competing value orientations coexist in the same culture at a given time, and in a specific situation and context. This leads to his second proposition, which postulates that, at a given time, the members of a given culture can choose from the rich portfolio of value orientations according to the situation, context, and time they find themselves in. In a previous article, Fang (2005-2006) had metaphorically described culture as an ocean with "a life of its own" (p. 81). In his words, every culture is characterized by "ups and downs of cultural values" (p. 82). This leads to his third proposition, according to which at a given point and under the influence of internal (Yin and Yang) and external forces (e.g. globalization, context), certain value orientations are legitimized, while

others are suppressed. Mattsson and Tidström (2015, p. 3) further note that "it is impossible to say exactly when and for how long a certain force will dominate". The "ocean" metaphor illustrates this dynamic process, in that the ocean's visible waves represent the values and behaviors that are activated in a given context, while the currents beneath the surface symbolize the values that lie dormant. In his fourth and last proposition, Fang conceptualizes the process of mutual influence and interaction that takes place between different cultures, especially through globalization, and affirms that each individual culture self-selects and constructs its own set of cultural values, which can dynamically change as a result of that culture's learning over time under the influence of internal and external factors.

Table 1. Fang's (2012) Yin Yang theory of culture: Four Propositions (pp. 36-42)

("+Vi" and "-Vi" and [i = 1, 2, 3, . . . n] symbolize various paradoxical value orientations)

Proposition 1: If there exist {"+V1", "+V2", "+V3", . . . "+Vn"} in a culture, {"-V1", "-V2", "-V3", . . . "-Vn"} can coexist in the same culture depending on the situation, context, and time.
Proposition 2: To guide action in a given context at a given time, human beings choose the most relevant value(s) from the full spectrum of potential value orientations ranging from {"+V1", "+V2", "+V3", . . . "+Vn"} to {"-V1", "-V2", "-V3", . . . "-Vn"}.
Proposition 3: In a culture in a particular context at a particular time some values {"+V1", "+V2", "+V3", . . . "+Vn"} can be promoted, while other values {"-V1", "-V2", "-V3", . . . "-Vn"} can be suppressed, thus resulting in a unique value configuration.
Proposition 4: Each culture is a unique dynamic portfolio of self-selected globally available value orientations ranging from {"+V1", "+V2", "+V3", . . . "+Vi"} to {"-V1", "-V2", "-V3", . . . "-Vi"} as a consequence of the culture's all-dimensional learning over time.

Embracing the conviction that each element contains the seeds of the other and that, together, they form a dynamic unity (Fang, 2010, p. 160), the Yin Yang approach to the study of organizational culture – and the reciprocal influences that national and organizational cultures play on each other (Nikčević, 2014) – appears to be a very useful resource with which to "grasp things in their interrelationships and in the totality to which they belong, in the process of change, of being born and of dying, in their conflicts and contradictions" (Acton, 1967, p. 392).

The need for applying the Yin Yang thinking to management studies is often linked to the need for scholars to take into account East/West differences for the meaningful analysis of Asian contexts (Jing and Van de Ven, 2014).

In this study, we aim to showing how the Yin Yang thinking can be applied to Western organizational settings. The Yin Yang approach to culture appears to be an appropriate point of departure from which to investigate other cultures, including Western cultures, in that it offers a broader perspective from which to understand the complexity of values and behaviors. With regard to market dynamics, for instance, Mattsson and Tidström suggest that Yin Yang principles can be useful in shedding light on dynamics that today "have not been fully explored in the field of market research in Western markets" (2015, p. 2). According to Chen (2008), a "transparadox" perspective could increase understanding of Western phenomena through the lens of East Asian theories such as Yin Yang. This, in our view, would lead to what Li calls a "geocentric integration between the West and the East at the fundamental level of philosophy" (2016, p. 3). In particular, Li argues that East Asian philosophical traditions offer a unique epistemological system that, unlike the epistemological systems of Aristotle and Hegel in the West, is able to fully appreciate paradox by reframing it into duality as "opposites-in-unity" (2016, p. 29). In this light, the Yin Yang epistemological system would allow us to see paradox not as a negative problem of inconsistency which is to be resolved by separating opposite elements, but rather as a positive solution through the partial integration of those very elements. Although this view is rooted in East Asian ways of thinking, it is interesting to note that Far Eastern culture is not alone in contemplating such a useful coexistence of opposites. As argued by Jing and Van de Ven (2016), some Western thinkers, including the ancient Greek philosopher Heraclitus and more recent thinkers such as Whitehead and Rescher, also gave importance to the concept of paradox in their theorizations. This seems to confirm the

importance of applying a duality principle to explain and balance paradoxical elements in Western scenarios.

In the present study, we draw on Fang's (2012) Yin Yang theory of culture while taking up the roadmap proposed by Li (2016) for applying the epistemological system of Yin Yang balancing to complex issues in management research, in general, and to paradoxical issues, in particular. In this light, our study sets out to respond to the following research question (RQ): "Can integrating and learning from other cultures and sets of values lead organizations and individuals to balance cultural paradoxes and manage cultural dilemmas? If this is the case, how does this happen?" We intend to respond to and further elaborate on the call put forth by Mattsson and Tidström (2015) that "the balance between opposing forces is in a state of constant change and should therefore be observed and analyzed over time" (2015, p. 3). Change should not be seen as just an episodic process, but should be recognized as a continuous process (Jing and Van de Ven, 2014), and our research intends to analyze the modalities and mechanisms through which cultural value change occurs. Jing and Van de Ven (2016, p. 14) summarize Li's (2016) comparison of an ontology of "being" vs. an ontology of "becoming": "being" refers to "a fixed, certain, and complete status or form of an existence before acquiring its relationships with other entities," while "becoming" refers to "an interdependent and interactive process with other entities before and after any entity acquires its status or form". Li (2016) states that the knowledge system of Yin Yang is built on the "becoming" ontology of reality (Jing and Van de Ven, 2016); it is on the basis of this knowledge system and this ontology of reality that we approach the present case study.

Methodology

We adopted a cross-case analysis in order to explore the dialogical complexity of organizational and individual behaviors depending on situation, context, and time. This methodology is considered suitable for the purposes of this study for three main reasons. First,

cross-case analysis allows researchers to compare cases from one or more settings, communities, or groups to observe formal and informal processes within an organization, and permits them to collect a vast array of data (Hartley, 1994). Second, it enables researchers to accumulate case knowledge, compare and contrast cases, and in doing so, produce new knowledge (Khan and VanWynsberghe, 2008). This provides opportunities to learn from different cases and gather critical evidence. Third, the cases play a supportive role, facilitating the understanding of specific issues, when conducting exploratory research on complex social phenomena in real-life contexts (Eisenhardt, 1989; Yin, 2014). Case study methodology (Yin, 2014) is useful in providing an in-depth understanding of a specific context, with the focus being on analytical (the findings specific to the research context) rather than statistical generalizations. In our analysis, we acknowledged the discipline-specificity of business case studies, as advocated by Piekkari *et al.* (2009), who highlight the importance of a descriptive, pluralistic and dynamic view. Cultural dynamics and cross-cultural research literature guided us in the formulation of the research questions.

We adopted an embedded case study design (Yin, 2014) which is considered appropriate for descriptive studies, where the main aim is to describe the features, context, and process of a phenomenon. It contains more than one sub-unit of analysis and allows to identify key components of human and environmental systems (Scholz, 2011). Its main strength lies in its ability to combine a variety of information sources, including documentation, interviews, and artifacts. In particular, we focused on the Generali Group to show how integrating and learning from other cultures and sets of values lead organizations and individuals to balance cultural paradoxes and manage cultural dilemmas. Founded in Trieste (Italy) in 1831, the Generali Group is one of the world's largest insurance companies. The group has 74,000 employees worldwide, serving 55 million clients in around 60 countries, while its gross written premiums exceed €70 billion, 34% of which originates in Italy and 66% abroad. Generali has a

consolidated presence in Europe that dates back almost 200 years and combines insurance expertise with existing large-scale distribution networks. We decided to study this specific company because of the exciting cross-cultural competences acquired by the group. We contacted via mail the companies belonging to the group during Summer 2015. Four of them agreed to participate in the study: Assicurazioni Generali Spa (Italy), Generali Deutschland AG (Germany), Generali France SA (France), and Generali CEE Holding BV (Central and Eastern Europe).

Research Data

We used multiple sources of evidence in order to address a broad range of contextual, attitudinal, and behavioral issues (Yin, 2014): interviews, field observations, and internal document analyses. This allowed us to ensure the validity and reliability of the data, thereby increasing the probability of our findings being credible (Lincoln and Guba, 1985).

At each company, interviews were conducted with five HR managers or project participants who were actively involved in sustainability reporting issues. Interviewees were chosen in conjunction with the case companies to include a range of levels of experience. Our decision to focus on these interviewees follows Patton's (2002) idea of identifying and selecting information-rich cases for the most effective use of limited resources. In particular, we identified and selected individuals with particular experience with the phenomenon of interest (Creswell and Plano Clark, 2011). All the interviews were conducted individually at the headquarters of the Generali Group in Trieste, Munich, Paris, and Prague during the period January-May 2016. Interviews were semi-structured (Merriam, 2009), meaning that we had a list of questions on topics to be covered, but we left the interviewees free to propose issues and topics that we had not included in the list of questions. The minimum time spent with each interviewee was one and a half hours, and the maximum was three hours. To remove or

minimize cultural bias, interviews were conducted neutrally (Holstein and Gubrium, 1995). In one of the branches, interviewer (one of the authors) and interviewees were native speakers of the same language. In each of the other branches, the same interviewer was backed up by a native speaker of the language of the interviewees. Interviews were recorded and transcribed so as to accurately quote the statements of the interviewees. At the moment of first telephone contact, the informants provided us with oral informed consent, a written version of which was then signed at the time of the interview. In return, we guaranteed the confidentiality of the participants' identity, and informed them of the purposes of the study (Lincoln and Guba, 1985).

Our second source of evidence was field observations; we visited each company twice during the period November 2015 - May 2016 to collect impressions and evidence from field observation of HR and sustainability reporting meetings and presentations. Meetings were observed, recorded, and then analyzed. Attention was also paid to the interactions between managers and employees as a potential source of evidence for the paradoxes, diversity, and changes that can portray cultures in action. Data obtained through these observations represented a control of the participants' subjective reporting of beliefs and actions. Participant observation was also useful in gaining a better understanding of the context in which study participants operate. This method helped us develop a familiarity with the cultural milieu of the companies.

Finally, we collected internal documents: booklets, slides used during meetings, and HR documentation. We also relied on public documents, such as the Generali 2014 and 2015 Integrated Reports and Sustainability Reports. These documents provided additional information on how case study companies are coping with cultural paradoxes and managing cultural dilemmas depending on situation, context, and time. A content analysis was then performed. We re-read the transcripts and wrote some memoranda in the margins. Documents

were coded into categories according to the three parameters (situation, context, and time) identified by Fang (2012) as playing a role in the selection and exhibition of value orientations. In this phase, some codes were redefined, in order to provide a more precise description of the data, while others were grouped in larger categories. Table 2 provides an overview of the sample companies and the data collected at each site.

Table 2. Sample companies and data sources

Companies	Assicurazioni Generali Spa	Generali Deutschland AG	Generali France SA	Generali CEE Holding BV
Turnover	30.9 bln. €	21.3 bln. €	14.6 bln. €	3.7 bln. €
Employees (approx.)	17,100	13,000	7,600	12,600
Interviews conducted	2 HR managers and 3 project participants	1 HR manager and 4 project participants	1 HR manager and 4 project participants	3 HR managers and 2 project participants
Average length of each interview	3 hours	2.5 hours	1.5 hours	2.5 hours
Site of the interviews	Trieste (Italy)	Munich (Germany)	Paris (France)	Prague (Czech Rep.)
Observations	HR and sustainability reporting meetings	HR and sustainability reporting meetings	Sustainability reporting meetings	HR and sustainability reporting meetings
Documents	booklets, slides, sustainability reports	booklets, slides, sustainability reports	booklets, slides, sustainability reports	booklets, slides, sustainability reports

These sources of data permitted triangulation, helping us ensure the trustworthiness of the research. In order to enhance the quality of our analysis and to assess its internal validity, external validity, construct validity and reliability, we considered trustworthiness dimensions adapted from Piekkari *et al.* (2009) and other scholars (e.g. and Stanley, 1963; Eisenhardt, 1989). Interviews, field observations and internal documents allowed us first of all to obtain an insight into the four branches of Generali. Assicurazioni Generali Spa is a leader on the Italian insurance market with an overall share of 16.2% thanks to the complete range of insurance solutions the Group offers its clients – retail, SME and corporate – in both the life and P&C segments. The company has 14,091 employees, 23.6 billion euros of gross written premiums and a total operating result of 2,087 million euros. For distribution, Generali Italia operates

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through a multi-channel strategy, mainly concentrated on agents. It also has a strong position in

the direct channel, through Genertel – Genertellife, the first online insurance launched in Italy.

The Group also offers a complete variety of insurance, pension and savings products to its

customers through Banca Generali. In 2016 Generali Italia launched its simplification program

following the completion of an integration process, launched in 2013, aiming for the unification

of all the existing brands into three main strategic brands – Generali (retail market and SME),

Alleanza (households) and Genertel (alternative channels). The goal is to improve customer

experience by simplifying the relationship between customers and agents – through the entire

process from pre-sales to assistance – and providing more accessible and innovative services.

In Germany, Generali Deutschland AG is the second largest insurance group in terms of

total premium income. Its market share is 5.6% in the P&C segment and 10.2% in the life

segment (also including the healthcare business), and it is particularly well positioned in the

unit-linked and protection business lines, in hybrid products, corporate pension plans and in the

direct channel. The company has 12,424 employees, 16.2 billion euros of gross written

premiums and a total operating result of 847 million euros. In 2016, Generali Deutschland

continued a strategic repositioning intended to implement different initiatives to strengthen its

position by leveraging its strong multi-channel presence, adopting a simplified and market

focused approach, adopting a new business model in the life segment, and launching a range of

innovative and smart products, services and processes focusing on specific customer needs.

Thanks to the strategic repositioning on the German market started in May 2015, governance in

Generali Deutschland has been strongly revised and made more efficient. Organizationally

speaking, the local holding, whose headquarters was based in Cologne, has been integrated with

the two main business units – Generali Versicherung (P&C) and Generali Leben (life) –

located in Munich, becoming the new Generali Deutschland AG. With the realignment of the

different Group companies' board of directors and the creation of a matrix management structure, Generali in Germany is continuously oriented towards agile governance.

In the French insurance market, Generali France SA is a major player, with 7,594 employees, 10.9 billion euros of gross written premiums and a total operating result of 701 million euros. It features a multi-channel distribution network, with a sales force including agents, employed sales persons, brokers, financial advisors, banks, direct channels, and affinity groups. The variety of the distribution channels reflects the features of both the market and the products distributed. This approach gained momentum after the "Customer centric" reorganization process of 2014, which was based on the creation of 4 separate client areas (Individual, Affluent, Professional & SME, and Commercial). Generali France SA is also renowned for its leadership in the Internet savings segment thanks to the excellence of the services provided and its important partnerships.

Generali CEE Holding BV is one of the biggest insurers in the Central Eastern European market. The Group ranks second in the Czech Republic, Hungary and Serbia, third in Slovakia and among the top ten in the other countries. The company has 12,061 employees, 3.5 billion euros of gross written premiums and a total operating result of 461 million euros. In terms of volumes, its main insurance markets are Czech Republic, Poland, Hungary and Slovakia. The contribution of minor markets has improved during recent years, resulting in an increase of the premium income. Generali CEE's technical profitability is the best in the entire region, with a medium-long term Net Combined Ratio at below 90%.

Method of Analysis

For analysis we followed the four-step method of Miles and Huberman (1994): within-case analysis, data reduction, cross-case analysis, and conclusion drawing/verification. A meta-matrix based on the three categories of situation, context, and time (Fang, 2012) was

displayed in order to provide a more systematic visualization and comparison of all the units of analysis at once. We also relied on the recommendation by Piekkari & Welch (2011) and Welch *et al.* (2011) to consider diversity and plurality in case study design to allow researchers to go beyond the dominant implicitly positivistic North American approach to conducting qualitative case study.

First, data from each unit was analyzed separately to give a complete picture of the role played by situation, context, and time in national and organizational culture. The same data analysis framework was used for each unit. Second, the collected data was transcribed into case descriptions which were then submitted to the informants of the case study companies to check their correctness, prevent observer bias, and enhance the credibility of the interpretation (Lincoln and Guba, 1985). The meta-matrix further supported data reduction by providing a way of organizing, simplifying, focusing, summarizing, documenting, sorting, transforming, and discarding text (Miles and Huberman, 1994). Third, comparisons of the cases were made to identify similarities and differences, and determine the combination of factors explaining them. Fourth, use of the meta-matrix, and structuring and indexing the information into separate fields or case categories helped us interpret the results and assess the trustworthiness, credibility, dependability, confirmability, and/or transferability of the inferences made.

Findings

Table 3 summarizes the data collected through multiple sources of evidence via a meta-matrix. The data allowed us to obtain a comprehensive picture of how integrating and learning from other cultures and sets of values leads organizations and individuals to deal with cultural paradoxes and manage cultural dilemmas. The three categories of situation, context, and time (Fang, 2012) were used for both data analysis and presentation, and, for each of them, data sources were indicated. Data from meetings, internal documentation, public documents,

interview transcripts, and participant observations were thereby triangulated to form a detailed and valid understanding of the dialogical complexity of organizational and individual behaviors depending on situation, context, and time. Each of the categories shown in Table 3 is discussed separately below to elaborate on the findings. For the sake of clarity, it is important to highlight that in Table 3 the hollow bullet points represent specific paradoxes encountered by the companies, while the solid bullet points describe the initiatives adopted by the companies to balance paradoxes.

Table 3. Summary of Findings: Balancing the paradox across case studies

Categories	Situation	Context	Time
Category description	Particular situations and events can affect the way people and organizations perceive the environment in which they are immersed, pushing them to adapt their value orientations and portfolios accordingly.	People and organizations are embedded in particular contexts. Individuals and organizations can reshape their values and behaviors to comply with contextual features, and contexts can be affected by people and organizations that can bring new value orientations and ways of thinking.	All-dimensional learning over time generates unique dynamic portfolios of value orientations. At a particular time, some values can be promoted, while others can be suppressed as the result of different factors, ideas, encounters, etc.
Assicurazioni Generali Spa (Italy)	○ Face-to-face time encourages good work relationships and favors trust among team members. ● In 2016, the company introduced telecommuting for employees who can work regularly from home with a constant rotation between home and the office for a maximum of 60% of their weekly hours. ○ Private-car usage is the preferred means of transport for travelling to and from the office. ● The company has promoted the use of public transport or shared transport arrangements, by providing reduced local-transport travel incentives.	○ Italy is particularly vulnerable from a hydro-geological perspective. However, due to the lack of an effective and coordinated assessment system, it is difficult to perform a socio-economic analysis of the costs and benefits of prevention activities. ● In 2016, the company decided to finance an interdisciplinary project, in partnership with national research institutions, to assess the economic impact of prevention/mitigation policies, as part of a national strategy for natural disasters..	○ Italy is considered a highly success oriented society. Competition among colleagues can be very strong. ● In the last seven years, the company has promoted diversity and inclusion in the code of conduct. In 2014, Generali launched the 'Women's Mentoring Program', in which senior female leaders acted as mentors for their talented female colleagues. ○ Formality in Italian society is important and penal and civil codes are complicated with clauses and codicils etc. This was also true for Generali's travel policy documents. ● Customers in Italy have expressed the need for clearer policy conditions and contracts. The company simplified its internal processes to meet this need and developed a foldable, personalized, and visual document called "MyMemo".
Generali Deutschland AG (Germany)	○ The right to privacy, both at home and in one's office is paramount. Germans are very concerned about sharing personal information and data. ● In order to receive more tailor-made products and lower costs, customers authorized the company to access, store, integrate, record health data and driver behavior. ○ Traditionally, in Germany, companies were relatively interdependent to the German holding company. In this context, the decision-making approach was spread across the companies of the local group with a decentralized authority. ● In 2015, following a repositioning program, companies of the German group were merged in a more centralized organization. For example, the former fragmented non-customer-facing back office operations were consolidated at the national level to exploit economies of scale and localization.	○ Germany is considered an uncertainty avoidant country. People feel threatened by ambiguous or unknown situations. In fact, Germany is among the largest of Europe's national insurance markets. ● In 2015, the company issued "Risikoatlas", a survey to investigate domestic risk and insurance density and penetration among the 16 federal states of Germany. Results showed significant differences among them, enabling the company to set up tailored solutions and to react quickly to the customers' changing requirements.	○ Germany has earned the reputation of having a 'litigation culture' that permeates its legal system. ● In 2014, Generali examined German litigation behavior in the study "The Big German Litigation Atlas", analyzing one million litigation cases in the period 2002-2012. Results showed how litigation behavior has changed, as well as regional and gender differences. ○ German companies were very reluctant to use business ethics tools. Germans tended to shelter their ethical opinions from the public sphere. An invasion of this domain was rejected. ● In the last decades, several management tools have been imported from the US. In 2012, Generali developed a Code of Conduct ("Verhaltenskodex") to define the company's ethical value system, to provide rules and orientation for employees, and to signal their commitment to stakeholders.
Generali France SA (France)	○ Only 27% of French people really live a truly healthy lifestyle. 80% of them believe that companies have a fundamental role to play in ensuring wellbeing. ● In 2016, the company offered a health and wellness program to clients to encourage them to change their daily habits, through a reward system. Initial results showed sustainable health improvements among the target	○ France is considered a society in which some degree of inequality is accepted. Power is centralized and organizations are very hierarchical. ● The company implemented several projects aimed at facilitating the sharing of ideas and networking. "CulturEco", for example, spreads economic and financial culture among the employees with a bottom-up and	○ The French are considered to be emotionally independent with regard to groups in which they belong. This means that one is only supposed to take care of oneself and one's family. ● Generali France supported several socially responsible initiatives. For example, in 2014, it launched "BeeoTop", a co-working hub for NGOs and businesses working in the

	population. o In France, while digital accessibility is a relevant force in meeting customer needs, clients' desire for authentic and personalized human interactions is still proving to be very important. • In 2015, the company launched the 'Bodily Injury Alternative Settlement' (BIAS) course to provide claim experts with insights into the human touch needed to take care of victims with an injured-centric claims handling process.	gamified approach. o Digital transformation and the demand of empowered clients for a new level of customer attention has generated the need for a more client-centered organization. • Generali France overhauled its governance by making clients its central focus. In 2013, the company launched the "We, Demain" project to organize the company by client segment.	social and environmental spheres. It offers premises to promote social economy and sustainability initiatives.
Generali CEE Holding BV (Central and Eastern Europe)	o In Slovakia, hierarchical organizations are normal, with a top-down decision-making approach and formal communication channels. • In 2014, the company prepared a large team building event called 'Generali fun day' to promote its values in a pleasant and informal way. o Slovakia is a highly success oriented and driven society. It is important to be regarded as successful. • In 2016, the company launched a more inclusive recruitment campaign to help new mothers take the first steps toward their new career path and allow them a better work-life balance.	o EU aims to achieve higher levels of recycling and to minimize the extraction of additional natural resources. However, CEE countries still have lower recycling rates than the EU average. • In Generali, used paper is collected separately and given to a specialized company which recycles it. The recycled paper exercise books and notepads are then donated to schools and institutions for disadvantaged children.	o In Hungary, there is an emotional need for rules. Claim handlers managed claims by sending standard claims letters to customers. • In the last few years, the number of customer complaints has increased. Consumers expect a personalized experience. Now they receive personal calls instead of standard claim letters. o The non-profit sector has a long tradition in the Czech Republic. However, it was disbanded during the totalitarian regimes. At the end of the 1990s, the attitude toward the non-profit sector became more widespread and supportive. • The company, through its own foundations, supports charity projects aiming to help people in need and improving traffic safety in the region.
Summary of common themes from data	1. People can choose the most relevant value(s) from their full spectrum of potential value orientations according to specific situations and events. These events can push people to adapt their values to manage emerging paradoxes. 2. Organizations can nurture some values to the detriment of others to suit specific needs of the customers or to respond to particular changes in the market. 3. Customers may find it useful to select particular values to take advantage of specific situations or events. 4. Organizations can adapt their value portfolios, anticipating or following the emergence of a particular need.	1. Values can coexist in the same culture depending on a particular context. People promote the most relevant value(s) according to specific contextual features, learning how to deal with them. 2. Organizations immersed in a specific culture (national or organizational) can adapt their values to particular contexts. 3. Changes in the context can push organizations to promote some of their values, or even suppress part of them. 4. Organizations can even change structures and governance in response to contextual changes. 5. In particular contexts, organizations can adapt their values faster than individuals, helping them deal with the paradox and reach a new balance.	1. At a particular time, some values can be promoted, while others can be suppressed. Culture's all-dimensional learning over time generates unique dynamic portfolios of value orientations. 2. People and organizations can feel the need to adapt their value portfolios according to culture's changes over time. 3. Regional or contextual differences in values can be exacerbated or smoothed out over time, pushing organizations to adapt their strategies and operations accordingly. 4. Learning from other cultures over time can promote changes in people's and organizations' attitudes and value orientations,

Note: The hollow bullet points represent specific paradoxes encountered by the companies, while the solid bullet points describe the initiatives adopted by the companies to balance paradoxes.

Situation

Particular situations, events, or circumstances can affect the way people and organizations perceive the environment in which they are immersed, pushing them to adapt their value orientations and portfolios accordingly.

From the interviews and other sources of evidence, it emerged that organizations can nurture some values to the detriment of others to suit the specific needs of their customers or to respond to particular changes in the market and organizations. For example, in Italy face-to-face time is usually considered to be fundamental in building strong work relationships and supporting trust among employees. People feel more comfortable if they can see their interlocutors and interpret their gestures and body language in the correct way. It is also easier to enter the private sphere of other individuals, building good relationships and trust. However, the increased attention paid by employees to a healthier work-life balance, has pushed Assicurazioni Generali Spa to introduce telecommuting with a constant rotation between home and the office, downgrading the importance of face-to-face contact. This initiative has not encountered any resistance within the organization, and employees felt comfortable with this new approach, as they were happy to reduce the time spent commuting. This project has also increased employees' commitment and motivation. Similarly, in France customers have shown the need for more authentic and personalized human interactions with the insurance company when facing claim settlement problems, even if digital accessibility has been recognized as relevant to meet customer requirements. To respond to this newly observed need, Generali France SA has implemented a human touch approach in dealing with injured-centric claims handling processes. The company has adapted its value portfolio to develop a new hybrid human-digital strategy to succeed in the market.

Collected evidence also showed that customers may find it useful to choose the most relevant value(s) from the full spectrum of potential value orientations to take advantage of

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specific situations, events, or circumstances. For example, German customers are very concerned about sharing personal information and data. Germany has long-established data regulations and privacy rules are widespread throughout the country. This is believed to stem from a reaction against past regimes and their control systems. However, since 2015, Generali Deutschland AG has launched several health programs based on the provision of health data by the customers and other solutions that record driver behavior data to identify tailor-made products. For instance, "Generali Vitality" has been designed to encourage and reward healthy behavior for customers through an online health assessment and the use of behavioral economics linked to their policies. In line with this, with "RechnungsApp" clients diagnosed with diabetes receive a smartphone and a tool for measuring their insulin levels. This data is recorded by the app to keep diabetes monitored and reduce recourse to public health care facilities. Another example is provided by "Generali Mobility", an app that rates the driving style of customers from 0 to 100. This rating is then used to calculate premiums and incentives.

Interestingly, organizations can also adapt their value portfolios to suit the particular needs of the local market/environment. For example, Slovakia is considered a highly success oriented and driven society, in which organizations are very hierarchical with formal communication styles and a top-down decision-making approach. Nonetheless, in 2014, Generali CEE Holding BV adapted its value orientations by flattening its hierarchies and launching a more inclusive recruitment campaign. Communication styles within the company also changed thanks to the promotion of meetings and team building exercises in which informal communication is encouraged. In addition, recruitment and career paths became more broad-minded as they reduced the barriers that stood in the way of women who want to work, but also have a family. These examples also suggest that different value orientations can coexist in the same cultural setting depending on specific situations, events, and circumstances.

Context

People and organizations are embedded in particular contexts through a process of mutual learning over time. On the one hand, individuals and organizations can reshape their values and behaviors to comply with contextual features and elements, while, on the other hand, contexts can be affected by people and organizations that can bring new value orientations and ways of thinking.

Results showed that organizations belonging to a specific culture can adapt their values to suit particular contextual requirements. For example, Germany is among the largest European insurance markets. People feel uncomfortable with ambiguous or unknown situations and try to avoid them by establishing more structure. However, the 16 federal states of Germany present significant differences with regards to domestic risk and insurance density and penetration. Thanks to a survey conducted at regional level, Generali Deutschland AG has been able to investigate these differences and adapt its value portfolio accordingly. This has allowed the company to be perceived as being responsive to customers' needs while providing them with tailored products and services.

Changes in context can also push organizations to promote certain values, or alternatively suppress them. For instance, France is considered a society in which a certain degree of inequality is accepted. Power is centralized and organizations are very hierarchical. However, in the last few years, changes in the working culture based on flat hierarchy, flexible working conditions, informal knowledge sharing, and social activities have spread throughout the country. Generali France SA has implemented several projects aimed at facilitating networking and the sharing of ideas in response to these new requirements. More specifically, "CulturEcò" is a project designed to spread a proper knowledge of markets, insurance expertise, and a clear vision of one's contribution to the development of the business, as well as promote value creation among employees using an informal and gamified approach. Again,

"Cellules creatives" is an initiative designed to create internal think tanks to foster the development of creative ideas and involve employees in the innovation process, using an internal collaboration platform and following a bottom-up design. Thanks to these initiatives, employees feel more connected to the company's strategy, their leaders, and their teams. Engaged employees go beyond a transactional exchange and are willing to give discretionary effort.

Interestingly, the analysis conducted for this study showed that organizations can even change structures and governance to face contextual changes. For example, in 2013, Generali France SA launched the "We, Demain" project, a long-term strategic plan aimed at restructuring its governance and business model by making clients its central focus. Empowered customers, immersed in a digital ecosystem, demand compelling connections and personalized contents, altering their relationship with companies in new and unanticipated ways. To guide action in an altered context, the organization changed its value configuration, selecting the most relevant value(s) from the full spectrum of potential value orientations.

From the analysis of the different sources of evidence it also emerged that, in particular contexts, organizations can adapt their values faster than individuals can, helping them deal with cultural paradoxes and reach a new balance. For example, CEE countries still have lower recycling rates than the EU average, despite the EU's aims to achieve higher levels of recycling and minimize the extraction of natural resources. Even though some CEE countries have rapidly increased recycling rates in the last few years, some of them only recycle small proportions of their municipal waste and risk falling short of legally binding targets. In agreement with local municipalities, Generali CEE Holding BV has developed a broad recycling project to encourage employees to convert waste into resources. During the first phase, employees did not properly understand why the change was needed, and felt reluctant to adhere to the project. However, through an intensive communication plan, the company was

able to create knowledge and awareness among employees. These training initiatives have now gained large popularity and employee commitment among all Generali CEE's branches, helping them improve their recycling habits.

Time

Cultures can change over time. As discussed above, at a particular time some values can be promoted, while others can be suppressed as the result of technological developments, changes in geographical and ecological factors, political beliefs, philosophical or religious ideas, encounters with other cultures and ideas, and so on. Culture's all-dimensional learning over time generates unique dynamic portfolios of value orientations.

Evidence showed that people and organizations can feel the need to adapt their value portfolios according to changes in culture over time. For example, Italian penal and civil codes are complicated and full of clauses and codicils. This is due to an emotional need for formal rules to reduce the number of potential exceptions and manage ambiguous situations. However, the excessive number of laws has generated several problems for individuals and companies, due to the rigidity of the regulations, difficulties in interpretation, and compliance costs. Following the recent simplification process, customers in Italy have been expressing the need for clearer policy conditions and contracts. To address this "pain point", Assicurazioni Generali Spa has simplified its internal processes and developed a foldable, personalized, and visual document called "MyMemo" to make it easier for customers to understand travel policy documents. Similarly, the non-profit sector has a long tradition in the Czech Republic. However, it was disbanded during the totalitarian regimes, when such independent public initiative was considered undesirable. At the end of the 1990s, attitudes toward the non-profit sector became more supportive: governments created conditions for the rapid development of the sector and EU membership brought the opportunity to use funds to support the activities of

non-profit organizations. Following these changes, Generali CEE Holding BV created its own foundations to support charity projects aiming to help people in need and improve traffic safety in the region.

From the analysis of the interviews and other sources of evidence, it also emerged that regional or contextual differences in values can be exacerbated or smoothed out over time, pushing organizations to adapt their strategies and operations accordingly. For instance, Germany has earned the reputation of having a "litigation culture" that permeates its legal system. In 2014, Generali Deutschland AG examined German litigation behavior in the study "The Big German Litigation Atlas", analyzing one million litigation cases in the period 2002-2012. The main aim of the atlas was to stress the need for legal costs insurance, a type of insurance which covers policyholders against the potential costs of legal actions. Results showed how litigation behavior changed, as well as highlighting regional and gender differences. For example, Berlin was revealed to be the place with the highest litigation rates, while Bayern and Baden-Württemberg were the least litigious federal states. Men were also revealed to be more litigious than women. Litigation rates changed over time and the company used this data to adjust its strategies across the country. The atlas also became a powerful PR tool for communicating positive behaviors to potential customers.

Results also showed that learning from other cultures over time can promote changes in people's and organizations' attitudes and value orientations. For example, German companies were very reluctant to use business ethics tools. Germans tended to shelter their ethical opinions from the public sphere. An invasion of this domain was rejected. However, in recent decades, several management tools have been imported from the US to Europe. Some of them have been adapted to the different cultural, legal, and work settings and have become useful tools for enhancing companies' management and organization. Among these tools, compliance and ethics programs have been widely used throughout Europe. In 2012, following these changes in

the habits of stakeholders inside and outside the company, Generali Deutschland AG developed a Code of Conduct ("Verhaltenskodex") to define the company's ethical value system, to provide rules and orientation for employees, and to signal their commitment to stakeholders.

Contrasting voices that call for further research over time

Embracing a dynamic view of culture and cultural learning, the section above has illustrated how the case organizations balance cultural paradoxes by integrating and learning from seemingly opposite sets of values given particular situation, context and time. The findings discussed above appear to confirm that cross-cultural learning can work to manage cultural dilemmas and lead to greater effectiveness in the specific settings one operates in. Despite this, contrasting findings emerged from the data as well, suggesting the need for further research.

In some instances, for example, the management of paradox seemed to find resistance on the part of some parties involved, at one or more levels, which may give rise to some doubts about an all-embracing application of the Yin Yang theory to the case study. It was discussed above how the German branch of Generali managed to introduce a code of conduct, even though institutional interferences into the private sphere (such as ethical opinions) are traditionally seen as inopportune in Germany. This initiative had won the favor of stakeholders; however, some employees felt uncomfortable, or even skeptical, about it. In response, the company adopted multiple message formats to drive and reinforce behavior change. Nonetheless, some employees are still figuring out how to manage this paradox. Similarly, in the CEE countries, through an intensive communication plan, Generali was able to improve employees' recycling habits among its local branches, overcoming the initial resistance to change. However, some employees felt like they were under obligation to adapt their behavior and increase their recycling rates during their working time. This resulted in worsening intransigent and even hostile reactions. Again, the lack of comparable relevant public policies

outside the company exacerbated the risk of introducing these efforts in the restrictive domain of the organization itself. In addition, we reported above that Generali introduced telecommuting with a constant rotation between home and the office to improve employees' work-life balance. This initiative has downgraded the relevance of face-to-face contacts, usually considered to be fundamental in building strong relationships and trust in the Italian cultural setting. However, even though employees felt comfortable with this approach and it has not encountered any resistance within the organization, some managers felt reluctant to adapt to the new situation. They are still organizing and running several face-to-face meetings that are often perceived as ineffective and unproductive by other participants. Moreover, these face-to-face meetings are usually scheduled during the managers' downtimes, such as lunch breaks or outside of regular working hours, causing frustration and stress among employees, in particular commuters.

These examples of friction, revealed during the interviews, suggest that the application of the Yin Yang thinking in the Western organizational settings may not be easy. Despite representing a minority of the collected data, the appearance of contrasting voices and experiences does shed light on the complexity that cultural learning process entails. Fang (2010, p. 165):

> When different cultures (like Yin and Yang) "collide" with each other, the very collision itself, however painful it may be at the colliding moment, would help inspire and ignite invaluable cultural learning and management learning processes taking place on both sides, most probably leading to the integration of both cultures into a new hybrid culture. During the cultural collision, different cultural values radiate and penetrate into each other and coexist within each other, physically and cognitively.

Indeed, our case study shows that the cultural learning and change processes involve frictions, inconveniences, and pains. Furthermore, contrasting findings such as these appear to confirm

how cultural value change is a continuous process of becoming that needs to be analyzed over time, which is in line with the Yin Yang perspective on culture (Fang, 2012). Further research is needed to address if and how dynamically contrasting experiences of cultural learning and change such as cultural collisions, frictions and pains evolve over time and lead to a fuller understanding of and more effective management of cultural dilemmas and paradox in national and organizational settings.

Conclusion

This paper has described a cross-case analysis of four subsidiaries of an Italian insurance MNC drawing on the Eastern epistemological system of Yin Yang balancing (Li, 2016; Luo and Zheng, 2016) and on the Yin Yang theory of culture with three parameters (situation, context, time) (Fang, 2005-2006, 2012) that guide the selection and exhibition of value orientations. More specifically, the paper has attempted to respond to the following research question (RQ): "Can integrating and learning from other cultures and sets of values lead organizations and individuals to balance cultural paradoxes and manage cultural dilemmas? If this is the case, how does this happen?"

The study has shed light on a variety of processes that appear to confirm that organizations and individuals can adapt their value portfolios according to specific situations, context requirements, and changes over time. In this way, they are stimulated to reframe cultural paradox as something positive, and are empowered in coping with the culture dilemma. Our findings are in line with those of other recent research into an anomaly with regards to understanding East Asia. Baumann and his colleagues (Baumann *et al.*, 2016a) explored the "anomaly between economic growth and development experienced by Asian countries and their relatively low rankings in global competitiveness indexes by making the link between workforce performance and country performance" (p. 2197). Making particular reference to the

category of *situation*, our study has provided examples that show that, thanks to reciprocal learning, both organizations and customers choose the most relevant value(s) from the full spectrum of potential value orientations to take advantage of specific situations, events, or circumstances. The examples have also highlighted how different value orientations can coexist in the same cultural setting depending on the situation. With regard to *context*, the analysis has shown that, in particular contexts, organizations can adapt their values either through suppression or promotion, and that this behavior can also foster individuals to find new balance within paradox. Finally, in terms of *time*, the case study has provided examples of how people and organizations tend to choose the best value orientations according to changes in culture over time. In particular, the study has highlighted that the process of learning from other cultures over time can play a role in the shift of people's and organizations' choice of attitudes and value orientations. Our focus on the relative context of culture also provides support to the emerging conceptual framework that proposes to focus on "Relative Values and Moderated Behaviour"; the ReVaMB model (Baumann and Winzar, 2017).

Each culture, entrepreneurial, managerial, organizational, and nationals ones, is a unique dynamic portfolio of self-selected globally available potentials in value orientations as a consequence of the culture's all-dimensional learning over time (Fang, 2012). We are living in an era in which change is the new normal for the foreseeable future. Companies worldwide should embrace change to face the challenges posed by uncertainties about the future, technological developments, increasing amounts of data, fierce global competition, and so on. In this context, the Yin Yang wisdom can be very useful in shedding light on the dynamics that today have not been fully explored. Our study responded to the call put forth by Mattsson and Tidström (2015), according to which "the balance between opposing forces is in a state of constant change and should therefore be observed and analyzed over time" (2015, p. 3). In the same vein as the "becoming" ontology of reality put forward by Li (2016), our findings might

be helpful in providing a deeper understanding of contemporary phenomena in business and management that are puzzling contemporary entrepreneurs and managers stuck between a known past and an increasingly dynamic and fast-paced future.

A major limitation of this study is that it focuses on a limited number of subsidiaries of a single insurance MNC. While the findings shed light on the processes of reciprocal learning and integration at play in these four subsidiaries, future research is needed in order to investigate whether similar processes take place in other companies as well as other cultural and organizational contexts. What is more, we believe that further research needs to be conducted to examine if and how contrasting voices and experiences in the management of culture paradoxes, illustrated by some cases of friction reported above, do evolve over time and lead to an improved understanding of cultural dilemmas.

Despite these limitations, our study confirms the need to rethink the very notion of paradox, and to view it as something which should not be avoided or denigrated, but as something desirable that can bring about positive change. As Li suggests (2016), paradox is positive *per se*, and the endeavor to resolve it (proper to a Western perspective) might lead to a (non-desirable) reduction of complexity. Our findings, therefore, provide an insight into the empirical application of the Yin Yang wisdom in the study of culture, business, and management (Fang, 2012; Fang *et al.*, 2017; Li, 2016; Jing and Van de Ven, 2016; Luo and Zheng, 2016, among others). Although rooted in Eastern philosophy, the Yin Yang perspective on culture and paradox appears to be an appropriate point of departure from which to examine other cultures, including Western ones, at national, organizational and individual levels. It offers a broader perspective with which to understand the complexity of values and behaviors, as well as the validity of reframing paradox into a duality system of integration. We believe that the adoption of a Yin Yang approach to a Western business management case study also highlights the need for multi-perspective approaches in social science research. The most

important point emerging from our research is that nations, organizations and individuals can grow and prosper by embracing the opposite cultural values in given situation, context and time, though the processes may entail painful frictions, allowing them to succeed eventually in balancing cultural paradoxes and managing cultural dilemmas effectively in a dynamic world.

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