

**EXPLORING EMPLOYEE PERCEPTIONS OF IDENTITY
AND CULTURE:
A CASE STUDY OF SHELL NIGERIA**

By

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**A Thesis Submitted in Fulfilment of the Requirements for the Degree of
Doctor of Philosophy of Cardiff University**

**Human Resource Management Section, Cardiff Business School
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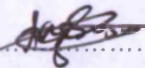


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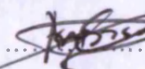
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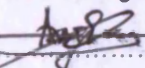
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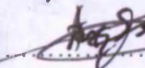
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PREFACE

While I claim all responsibility for the content of this work, I am also aware of the immeasurable debts I owe in completing this study. As these debts are far too many to be expressed within these pages, I shall be brief. First and most importantly, to my wife for believing in me and spurring me on when the nights looked darkest, I say 'Love you'! To my two lovely boys, now I can find the time to play with you.

I am thankful to all the staff at Shell Petroleum Development Company who participated in some way, either by granting access or granting interviews. This study would have not been completed without you.

I am eternally grateful to my supervisor, Professor Emmanuel Ogbonna for his friendship and constant support through this lengthy process. His firm guidance and helpful critique ensured I completed this thesis.

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Through the power of God all things are made possible.

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CHAPTER ONE

INTRODUCTION

As organizations increasingly compete on the basis of who they are and what they stand for, and as work environments become ever more virtual and dislocated, the boundaries between the organization and its wider environment become increasingly blurred. Within this context the concepts of organizational identity and culture become much more relevant. The literatures of both concepts have developed separately with culture having a more established pedigree in such diverse fields as sociology, law, anthropology and psychology. Academic interest and research of identity processes has grown fairly rapidly within the last two decades. Identity is perceived as an exciting, relatively new concept that captures the subjective experiences of employees. Albert et al. (2000) suggested that,

“... it is because identity is problematic – and so crucial to how and what one values, thinks, feels and does in all social domains, including organizations – that the dynamics of identity need to be better understood”(pg. 14).

Intuitively researchers have always associated identity and culture, sometimes conflating the concepts and using them interchangeably. Recent interest in identity as a powerful factor in structuring the subjectivity of employees and managing interactions with stakeholders has led to a greater effort by researchers to highlight the relationships and differences between culture and identity in order to achieve conceptual clarity. Hatch and Schultz (2000) acknowledged this connection when they observe that,

“Identity involves how we define and experience ourselves and this is at least partly influenced by our activities and beliefs, which are grounded and interpreted using cultural assumptions and values. What we care about defines us to ourselves and thereby, to some extent, forges our identity in relation to our culture” (pg.25).

However, theoretical developments in integrating identity and culture remain largely conceptual with little empirical contribution (Notable exceptions include, Corley, 2004; Ravasi and Schultz, 2006). The purpose of this thesis is to address this gap and provide theoretical and empirical contributions to enable a better understanding of the dynamics of these concepts within work settings. To achieve this objective, this thesis evaluates how

employees' understanding of these organizational constructs structure their self- concepts and influence their interactions with the organization and fellow employees. The study focuses on an 'extreme case'. Eisenhardt (1989) argues that extreme cases facilitate theory building because the dynamics being explored tend to be more visible than they would be in any other context. The single case study organization was Shell Petroleum Development Company Nigeria Limited, a subsidiary of the Royal/ Dutch Shell plc. Commonly known as Shell within its Nigerian context, this company's core business is in the exploration, production, processing, transportation and marketing of hydrocarbons. Shell was listed as the largest global corporation for 2009 by Fortune magazine with a revenue of 458.361 billion (US dollar) for 2008. In 2011, despite the global recession the revenue was 368,056 billion (US dollar) for 2010 and the company employed 101,000 employees worldwide.

In Nigeria, Shell Petroleum Development Company (SPDC) remains the largest employer behind the government. Its size and dominance of the industry sector has been long established since the early 1960's. However, as a result of its long term exploitation of oil resources within the Niger Delta regions of Nigeria, and the emergence of stakeholder activism and militancy from its host communities, Shell in particular and the rest of the industry have become increasingly exposed to identity threats. At the time of field work in 2005-2006, Shell was undertaking major transformational change to clarify its identity, meet the competing demands of stakeholders and remain a profitable technical partner to the government. More recently, in 2010 and 2011 Shell Nigeria's strategy has been to rationalise its assets within the Niger delta to limit its onshore operational footprint and reduce the impact of militancy on its activities. This has led to a sale of some land-based oil mining leases and a preference for investment in Nigeria's deep water exploration and production assets. Shell's divestment of its land assets has included fully functional field locations. In some notable cases (e.g. Amukpe and Sagbara flow stations) Shell staff operating these locations have been included in the transfer of ownership.

As a result of the scope and scale of these changes, organizational core values, identity and culture discourses were dominant within the organization. Thus, Shell Nigeria could safely be considered an industry exemplar.

To understand fully the context and themes relevant to identity and culture in the workplace, a thorough review of the literature was conducted. The details of these reviews are detailed in

subsequent chapters. The next section outlines the structure of the thesis and provides a brief summary of the contents of each chapter.

Structure of the thesis

Chapter 1: Introduction highlights the interest in the concepts of identity and culture within the field of organizational behaviour and provides some information regarding the research. This includes a brief summary of the scope, objectives and the justification of the importance of the study. This chapter would also contain an overview of the chapters in this thesis.

Chapter 2: Culture and identity in Organizations reviews the literature on culture and identity research over the years and provides definitions of these concepts. These definitions are discussed and the definitions preferred for this study are selected. Furthermore, highlights of the key theoretical and empirical developments within this area are presented and analysis of the relevance of these developments is provided. Finally, this chapter explores how culture and identity are implicated in power dynamics within organizations and their use as forms of normative and ideological control. The chapter suggests that normative control is usually blended with other traditional forms of control such as processes and structures within organizational settings.

Chapter 3: Linking Organizational Culture and Identity. This conceptual chapter does not seek to integrate culture and identity into a single 'super' construct. Rather, it seeks to provide a framework capable of theorising the dynamic inter-relationships between these two constructs in organizational life. A critical review is conducted of new research within this area which has sought to integrate identity and culture applying different perspectives. The chapter suggests that conceptual gaps identified during the review may best be resolved by applying the concept of relational differences and the culture – identity dynamics model proposed by Hatch and Schultz (1998). A modified model which incorporates core values as a linch-pin between identity and culture was argued to theorise the influence of identity and culture on organizational sense-making more robustly.

Chapters 4 & 5: These two Methodological Chapters detail the research aims and objectives and examine the methodological options available to address the research questions. Issues about reflexivity, especially within an organization where the researcher had worked

previously, were discussed and made explicit. Within these chapters, I confirm the methodological orientation of the study and provide justifications. Furthermore, any constraints experienced during fieldwork was discussed in some detail and analytical options highlighted. Finally, some of the key actions taken to limit the challenges of a case study research approach were elaborated.

Chapter 6: Organizational Context is the first of the empirical chapters and sets the context by examining both the macro and micro environment within which Shell operates to ensure that factors which may affect the adoption of particular identity strategies within the organization are fully highlighted.

Chapter 7: Experiencing organizational culture and identity at work – the role of core values. This chapter is the first of two empirical chapters which presents data from the case study organization. The data within this chapter focuses primarily on individual processes, exploring how employees experience identity and culture within their daily work interactions. I will discuss and elaborate on employee understanding of the organization's identity and culture from the values perspective. This chapter will seek to explore the utility of these conceptualisations to the understanding of employee workplace experiences. The organization and presentation of the empirical material reflects some of the identity and culture themes which were highlighted at the end of the literature review in Chapter 3 and which guided the development of the interview schedule.

Chapter 8: Organizational strategies and processes supporting adoption and entrenchment of values. This is the third of the empirical chapters and seeks to examine identity and culture from an organizational or meso-level perspective. It investigates the organizational level strategies adopted by Shell in seeking to craft what it describes as an elite identity and communicating this to both internal and external stakeholders. It focuses particularly on HRM strategies and practice and then discusses employee lived and enacted experiences of HRM. Some of the discussions and data presented highlight the possibility of meaning and identity contestation where there is some discordance between HR strategies and organizational values. Furthermore, this chapter details some of the implications of organizational re-structuring on employee identification or resistance.

Chapter 9: **Discussion and Conclusion** engages in a theoretical analysis and evaluation of the empirical data. It examines the various implications of the data to tease out significant concepts or themes which contribute to our understanding of employee perceptions of identity and culture. This chapter, presents key findings from the thesis, highlights limitations from the research and suggests areas and themes for future research. A key finding is that organizational responses to stakeholder identity threats include the articulation of strategically ambiguous core values which are designed to meet the competing demands of different stakeholders. Furthermore, these core values are not consumed uncritically by employees as an aspect of their identity but are contested, amended and validated with reference to cultural symbols and practices. In multinational organizations where a diverse range of cultures exist, the meaning attributed to these core values varied significantly. A large number of the respondents were able to differentiate between the Aspirational Identity promoted through top management sense-giving processes and the Authentic Identity validated by organizational culture and positive and enabling human resource practices.

CHAPTER TWO

CULTURE AND IDENTITY IN ORGANIZATIONS

2.1. INTRODUCTION

This chapter is the first of two chapters that provides the theoretical background for this work. The chapter provides an overview of the two concepts under investigation, organizational culture and organizational identity. It explores the origins and definitions of the two concepts, the key assumptions that underpin each construct as well as the theoretical developments in each area.

Prior to the presentation of the review, it is useful to point out that the aim of this chapter is not to provide an exhaustive review of the literature in the two areas. Instead, the objective is to provide the background that will help in linking the two concepts in the next chapter, thus contributing to the development of the theoretical framework for this study.

Over the past 30 years, culture and identity have become two of the dominant analytical concepts in organizational research. The utility of culture as an explanatory variable (Schein, 1992; Kotter and Heskett, 1992; Denison and Mishra, 1995) or metaphor (Smircich, 1983; Hatch, 1993) of organizational behaviour can be comprehended by an evaluation of the large number of academic journal articles and popular management texts dedicated to these topics. Likewise, identity has recently developed as a key construct which allows organization researchers to explore the processes whereby subjectivity is constructed and maintained within organizational settings. This may involve examining identity as a narrative construction (Ricoeur, 1991; Czarniawska, 1997; Alvesson and Karreman, 2000a; Brown, 2006), as a metaphor (Gioia, 1998; Gioia et al., 2002) or as ideological control (Kunda, 1992; Deetz, 1995; Sveningsson and Alvesson, 2003).

With its modern origins as a way to counter dominant rational analysis of organizations, culture focused on exploring the rich tapestry that comprised the context of organizational life. The continuing appeal of culture to organizational thinkers and practitioners is twofold.

Firstly, culture was seen to be capable of solving the key management challenge of ensuring and maintaining the commitment of employees to the goals and objectives of the organization. For example, Schein (1999:3) has argued that 'culture matters because decisions made without an awareness of the operative culture may have unanticipated and undesirable consequences'. Managers have consequently sought strategies to change their culture to achieve desired objectives. This culture management approach to organizational culture has polarised organizational researchers into three broad camps; those that believe culture can be managed and controlled (Schein, 1992), those who believe culture is resistant to top management control and manipulation in the same way as other organizational variables (Legge, 1995) and those who believe that culture may be modified under certain conditions leading to some form of behavioural compliance (Ogbonna and Harris, 1998; Hatch, 2000). Secondly, culture was perceived as a concept with sufficient scope to broaden the understanding of organizational behaviour. Many academics were critical of mainstream organizational research which emphasised a rational model of human behaviour, quantitative neo-positive science and a love for numerical analysis (Martin et al., 2004). Culture promised an emancipatory approach to the study of organizational phenomena and allowed the exploration of diverse symbolic media in the development of organizational theory.

Similarly, as the global economy becomes increasingly competitive and dynamic, organizations have been criticised variously for their role in contemporary society. This criticism, which has involved issues relating to corporate social responsibility, corporate governance and ethics and various aspects of organizational functioning, has called into question the traditional roles of businesses in society (Hemingway, 2005). In this climate, organizations struggle to maintain their identity in the midst of reputational crisis (Elsbach and Kramer, 1996; Ravasi and Schultz, 2006). Authors have noted that creating and maintaining organizational identity becomes increasingly difficult in such a turbulent environment (Albert and Whetten, 1985; Cheney and Christensen, 2001).

Furthermore, as employees become multiple stakeholders in organizations; employees, stakeholders, members of the community and possibly customers, the traditional division between external image and internal identity begin to blur (Hatch and Schultz, 1997). Organizations run an increased risk of exposure and employees struggle to make sense of their identity and ensure its legitimacy (Suchman, 1995), especially when threatened by public criticism. Furthermore, spatial and temporal dispersion of organizational members,

due to either work locations or individual circumstances, poses an emerging challenge of coordinating culture and identity in the virtual organization. It thus becomes important that organizations have an internalised cognitive structure of what they stand for and where they intend to go – in short, a clear sense of organizational identity closely linked with the mechanisms for communicating this identity. Indeed, Albert et al. (2000) argue that a sense of identity serves as a rudder for navigating difficult waters (pg. 13).

Frameworks and methodologies for the study of organizational culture and identity have proliferated as a consequence of these developments and the following sections will seek to define these concepts and highlight some of the most influential thinking which has dominated modern conceptualisations of culture and identity.

2.2. DEFINING CULTURE AND IDENTITY

2.2.1. DEFINING ORGANIZATIONAL CULTURE

The concept of culture has been variously defined in the literature. This section would seek to highlight some key definitions and explore how these are integrated in explanatory frameworks of culture. There are certain common themes in the literature, but different paradigmatic positions ensure there is no consistent agreement on what it actually is and how it may be differentiated from related constructs like climate or atmosphere. It is generally accepted that certain characteristics define the existence of a culture (Smircich, 1983; Schein, 1992; O'Reilly et al., 1991). The mainstream literature suggests that these include a shared language, behavioural regularities, shared values, certain ways of thinking and acting and a certain level of stability that allows these attributes to be learned and communicated to newcomers. Table 2.1 provides a selection of some useful definitions of the culture concept.

The most widely quoted definition of culture in the literature was proposed by eminent culture theorist Edgar Schein (1985, 1992). He defines culture as enduring assumptions, values and beliefs that are shared by members of an organization, that operate unconsciously, and that define in a “taken-for-granted” fashion an organization’s view of itself and its environment. It is needed to solve the problems of internal integration and external adaptation to survive in its environment. These cultural beliefs and expectations serve as a normative

order that influences how people perceive, think, feel and behave in their environment (O'Reilly, 1989).

Selected Definitions of Organizational Culture	
Researcher	Definitions
Jaques, E. (1952: 251)	“Culture is the customary and traditional way of thinking and of doing things, which is shared to a greater or lesser extent by all its members, and all new members must learn, and at least partially accept, in order to be accepted into service in the firm”
Pettigrew, A. (1979: 574)	“Culture is a system of publicly and collectively accepted meanings operating for a given group at a given time. This system of terms, forms, categories, and images interprets a people’s own situation to themselves.”
Louis, M.R. (1983: 39)	“Organizations (are) culture-bearing milieux, that is, (they are) distinctive social units possessed of a set of common understandings for organizing action (e.g., what we’re doing together in this particular group, appropriate ways for doing in and among members of the group) and the languages and other symbolic vehicles for expressing common understanding.”
Siehl, C. and Martin, J. (1984: 227)	“...organizational culture can be thought of as the glue that holds an organization together through a sharing of patterns of meaning. The culture focuses on the values, beliefs, and expectations that members come to share.”
Schein, E. (1985: 6)	“The pattern of basic assumptions that a given group has invented, discovered or developed in learning to cope with its problems of external adaptation and internal integration, and that have worked well enough to be considered valid, and therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to these problems.”
Maanen, van J. (1988: 3)	“Culture refers to the knowledge members of a given group are thought to more or less share; knowledge of the sort that is said to inform, embed, shape, and account for the routine and not-so-routine activities of the members of the cultureA culture is expressed (or constituted) only through the actions and words of its members and must be interpreted by, not given to, a fieldworker..... Culture is not itself visible, but is made visible only through its representation.”

Trice, H. and Beyer, J. (1993: 2)	“Cultures are collective phenomena that embody people’s responses to the uncertainties and chaos that are inevitable in human experience. These responses fall into two major categories. The first is the substance of a culture – shared, emotionally charged belief systems that we call ideologies. The second is cultural forms – observable entities, including actions, through which members of a culture express, affirm, and communicate the substance of the culture to one another.”
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Table 2.1. Selected definitions of culture derived from Hatch 1997.

Evaluation of Culture Definitions

Common to all these definitions is the idea that culture is something which is shared or held in common within a particular social field (Schein, 1992; Smircich, 1983; Alvesson, 1993) which leads to some form of behavioural consistency (Ogbonna and Harris, 1998). However, there is much less agreement on where such shared cultural meanings reside. As a consequence of this debate, some of the key definitions above treat culture as *cognitive* phenomena, while some explore cultural meanings as *symbolic* phenomena and a third group tend to adopt a combination of both approaches.

Organizational researchers who view culture as *cognitive* phenomena theorise that the most important location of cultural meaning is in the minds of the organizational members and ignore or accord lesser importance to observables like behaviour, symbols or artefacts. Hence, in their studies of culture, they commonly centre their definitions on cognitions which are variously labelled values, shared meaning, mental schemas, patterns of interpretations, basic assumptions and knowledge systems (Hofstede, 1980; Siehl and Martin, 1984; Schein, 1992; Sackmann, 1991; Martin, 1992).

When organizational researchers perceive cultural meaning as *symbolic* phenomena, they explore how culture is enacted and made ‘real’ through behaviour, language, legends, and artefacts. Indeed, Gagliardi (1996) argues that symbols ‘enable us to take aim directly at the heart of culture’ (pg. 568) because they represent what is known but cannot be easily articulated by organizational members. For researchers focusing on organization symbolism, definitions of culture incorporate symbols not as by-products of organizational life but as elements that structure members’ active construction of sense, knowledge and behaviour (Dandridge, Mitroff and Joyce, 1980; Weick, 1995).

The third group of organizational researchers define culture as comprising of both cognitive and symbolic elements and give them equal prominence (Barley, 1983; Trice and Beyer, 1993; Van Maanen, 1991; Kunda, 1992; Hatch, 2000). This research study will adopt the third perspective because I see both symbolic and cognitive dimensions of culture as crucial to our understanding of the concept.

Another theme to emerge from these definitions is the role of culture in ensuring *survival*. This role allows organizations to adapt to and thrive in their environment. Some organizational theorists equate cultures' adaptability function with increased effectiveness (Brown, 1995; Denison, 1990). Schein (1992) however, discusses how culture enables organizations both to survive in and adapt to the external environment. Trice and Beyer (1993) see cultures as providing guidance to managers and organizational members as they act to 'ensure their organization's' survival and continued prosperity' (pg.1). Further insights on the contributions of culture in relation to the understanding of organizational phenomena will be explored in more detail in our subsequent review of cultural models.

Meanwhile, for the purposes of this research I would draw on Schein's (1985) definition of culture and subsequent analysis by Hatch (1993) to define culture as,

"the pattern of historically derived symbols, artefacts, values, norms and assumptions that a group of people have learned or developed in order to cope with their everyday challenges, which validate or confirm their identity as a group and that are seen as essential tools in the indoctrination of new members".

2.2.2 DEFINING IDENTITY

The term identity has been much debated amongst sociologists. Durkheim and Mead explored how the individual interacts with those around him to define his sense of self. Thompson and McHugh (2002) suggest that the concept of identity commonly involves the notion that there is an irreducible core of social and individual being that uniquely identifies us. Psychologically, identity variously incorporates concepts of self and self-esteem, structures of values, attitudes and beliefs, personality and associated traits, whilst sociologically, identity emphasises concepts of self, roles and reference groups (pg.220).

For the purposes of this research, the identity concept will be explored in two broad forms: Individual identity and collective or organizational identity. In defining collective identity, it is recognised that all social grouping, such as units, teams, departments or professional affiliations would likely exhibit and develop some form of identity. This is in keeping with research which shows that in any social context there are competing, overlapping and nested identities which individuals may necessarily tap into depending on their salience and the exigencies of the moment (Gioia et al. 2000). This section will seek to discuss the identity concept at both the level of the individual and the collective, highlight important differences and indicate its relevance for organizational research. A framework of organizational identity change will be presented and critiqued.

2.2.2.1. Individual or Self- Identity

Self-identity relates to the question of ‘who am I?’ This evolves from an individual’s personal experience as a separate being, drawn out over time and space (Giddens, 1991) which assumes some form of coherence and continuity (Alvesson and Willmott, 2002) in providing a stable platform for interactions with others within the social sphere. The question above indicates that identity is not only personal but possesses social dimensions, and is constructed and affirmed through interaction. Individual identity is thus seen as a self-theory that ‘is formed and maintained through actual or imagined interpersonal agreement about what the self is like’ (Schlenker, 1986:23) and is constantly tried out in interactions via impression or image management activities. Goffman (1959) advanced a dramaturgical metaphor to explain the dynamics of impression management activities that the individual is willing to engage in, in order to enhance the self concept. He suggested that individual behaviours, similar to actors on a stage, are largely conducted for the benefit of others, but serve the individual’s self interests. He notes that “in so far as this mask represents the conception we have formed of ourselves – the role we are striving to live up to- this mask is our truer self, the self we would like to be” (Goffman, 1959:19).

Some authors suggest that many western cultures have emphasised the uniqueness of individuals within their social setting. The self is viewed as an independent, autonomous, separate being defined by a unique repertoire of attributes, abilities, thoughts and feelings (Kunda, 1999). The individual attempts to express these internal attributes of the self publicly but would seek to confirm them privately through processes of comparison and categorisation of others. Thus there are two components to the identity process: an external expression or

manifestation and an internal cognitive comparison to establish consistency and congruence. It is the harnessing of these internal attributes in an ordered and structured way that gives meaning to one's sense of self. The external manifestation of self in a variety of social situations is seen as important, but is not equated or seen as central to one's core identity, which is more linked to core inner attributes. In non-western societies the perception is that one's sense of self is more grounded in social relationships; the interconnectedness that exists amongst networks that structure meaning, and thus the self is experienced as fluid, changing and dynamic, taking on different hues in a variety of social settings.

2.2.2.2. Organizational Identity

In a seminal article, Albert and Whetten (1985:292) defined organizational identity as: "A particular type of question. The question 'what kind of organization is this?' refers to features that are arguably core, distinctive, and enduring and reveal the identity of the organization". This has formed the definitional pillars for most research on organizational identity. However, recent literature has questioned the extent to which organizational identity is really 'enduring' (Gioia and Thomas, 1996; Gioia et al., 2000; Scott and Lane, 2000) or indeed 'distinctive'. Stability of identity allows members to make sense of their experience (Weick, 1995), and continuity over time is perceived to provide organizational members with psychological anchors and reduce the anxiety associated with change (Gustafson and Reger, 1995). However, some researchers have questioned the ease with which dynamics of individual identity theory have been adapted uncritically to notions of organizational identity. Christensen and Cheney observe that "although it is widely accepted that continuity is an important dimension in *individual* identity (e.g. Eriksson, 1968; Mead, 1934), it is not clear in exactly what respects this observation applies to organizational identity" (2000: 258). Gioia (1998) contends that whilst "individual identity is socially constructed with the balance shifting towards a centring stability, organizational identity is constructed with the balance shifted towards adaptive instability" (pg. 22). In order to capture fully the dynamic and ambiguous nature of identity in modern corporations and virtual organizations, Gioia et al. (2000:76) suggest that the key questions to ask is, "Is this who we really are as an organization?" They argue that the seeming durability of identity actually lies in the stability of the labels or images used by organization members to express who or what they believe the organization to be, but that the meanings associated with these labels are constantly being

revised, updated and negotiated to address developments within the organizational context (Gioia et al., 200:64).

Adopting a stakeholder perspective to organizational identity, Scott and Lane (2000) assert that organizational identity is an emergent phenomena arising from the complex interactions among managers, organizational members and other stakeholders. They thus define organizational identity as “the set of beliefs shared between top managers (hereafter called “managers”) and stakeholders about the central, enduring, and distinctive characteristics of an organization”(pg. 44; emphasis in original text). Organizational identity construction (OIC) is seen to incorporate image making activities, cognitive reconstruction activities and the evaluation of identity relevant feedback. This relationship is captured in Figure 2.1 below:

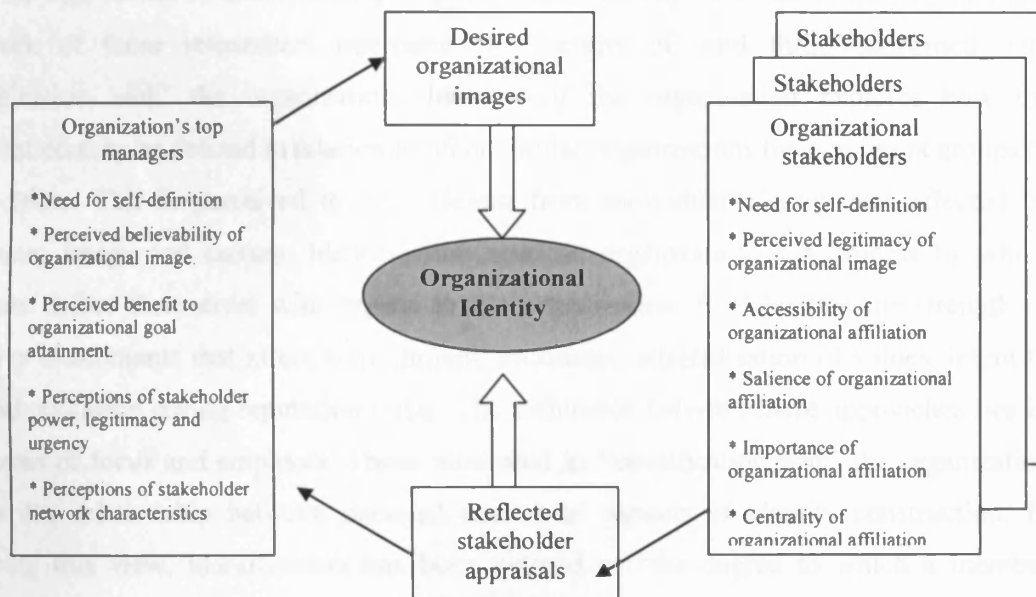


Fig. 2.1. OIC in the context of Manager-Stakeholder Relationships (Scott and Lane, 2000)

Hatch and Schultz (1997) broadly define organizational identity as what members perceive, feel or think about their organization, and is assumed to be a collectively owned quality linked to core organizational values and attributes. They tend to adopt a view which presents corporate identity as a slightly different concept from organizational identity and which focuses more on what top management and the leaders of an organization wish to present as

core to and for an organization. This marketing and communication approach tends to link corporate identity to processes of visual imaging and corporate strategy (Olins, 1995). Organizational identity is here discussed as existing in two dimensions: the external and the internal. The external explores the dynamic interplay of external images in constituting identity and the internal dimension is seen to represent the internal perceptions of organizational members which is derived from collective sense making about what is core, shared and 'enduring' about the organization and involves a closer awareness of the values and codes which guide behaviour on a more unconscious level. Other researchers have drawn attention to the reciprocal relationship between identity and image (Whetten and Godfrey, 1998; Gioia et al., 2000; Hatch and Schultz, 2002), legitimacy (Suchmann, 1995; Sillince and Brown, 2009), reputation (Dukerich and Carter, 2000; Fombrun and Rindova, 2000).

Following theoretical developments in the field (Whetten, 1995; Whetten and Godfrey, 1998) the approaches to understanding organizational identity have been differentiated into the work of those researchers interested in 'Identity of' and those concerned with 'identification with' the organization. Identity *of* the organization explores how the organization may be defined in relation to other similar organizations by its referent groups or stakeholders. This is perceived to be different from individual identity and affected by reputation, image and culture. Identification *with* an organization is a process by which members define themselves with regard to the organization. It elaborates the strength of cognitive attachments that affect commitment, encourage internalisation of values, intent to stay and resilience during reputation crisis. The difference between these approaches lies in their areas of focus and emphasis. Those interested in 'identification with' the organization explore the relationship between personal and social aspects of identity construction. In furthering this view, identification has been defined as "the degree to which a member defines him- or herself by the same attributes that he or she believes define the organization" (Dutton et al., 1994: 239).

The interplay between organizational image, identity and culture is represented in a dynamic model (See Hatch and Schultz, 1997, 2002) which is shown in Figure 2.2 below and will be discussed in more detail in the next chapter on the theoretical framework.

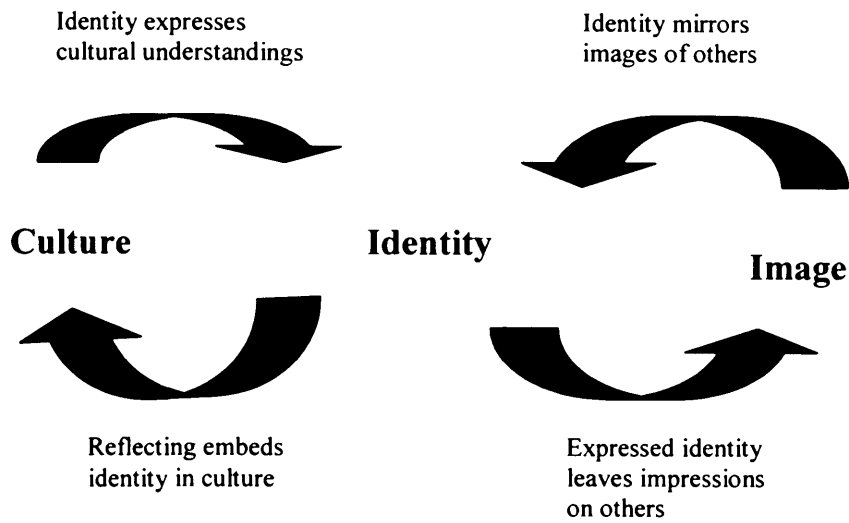


Fig.2.2. The Organizational Identity Dynamics Model (Hatch and Schultz, 2002)

Thus, for the purposes of this research I would draw on Hatch and Schultz (1997) definition of identity and subsequent analysis by Scott and Lane (2000) to define organizational identity as what,

“Members perceive, feel or think their organization stands for which is assumed to be a collectively owned quality linked to core organizational values and attributes and validated through interaction with stakeholders”.

2.3. KEY CULTURE AND IDENTITY FRAMEWORKS

2.3.1. KEY CULTURE MODELS AND THEORIES.

The section below explores and highlights three key conceptual models of organizational culture that exist in the culture literature. Despite the criticism that models may oversimplify complex phenomena, these models serve an important role in guiding empirical research and generating theory. I shall discuss the conceptual and analytical implications of the models developed by Schein (1985, 1992), Martin (1992, 2002) and Hatch (1993, 2001). These three models complement and enrich each other in various ways; this will be examined in the analysis below. At the end of this section, the concept of sub-cultures which has emerged as a significant theme in the analysis of cultural models, will be explored in some depth.

2.3.1.1. Schein's Three Levels Model of Culture

Edgar Schein (1985; 1992) defined culture along the dimensions of internal integration and external adaptation. He articulated a conceptual framework or model for analysing culture in organizations and suggested that culture resides on three levels (See Fig. 2.3).

Schein suggests that the first or surface level is composed of *artefacts*. *Artefacts* are those material and non-material aspects of the organization which can be easily observed by insiders or outsiders and represent some organizational activity or process. These include organizational architecture, the physical and material aspects of the organization, temporal and spatial dispositions within the organization, the language, technology and observable rituals of the organization. These surface manifestations of an organization provide clues to the actual culture of the organization. Schein (1992) however, cautions against the hasty interpretation of these manifestations, as even organizational members might have conflicting ideas of what these manifestations actually mean.

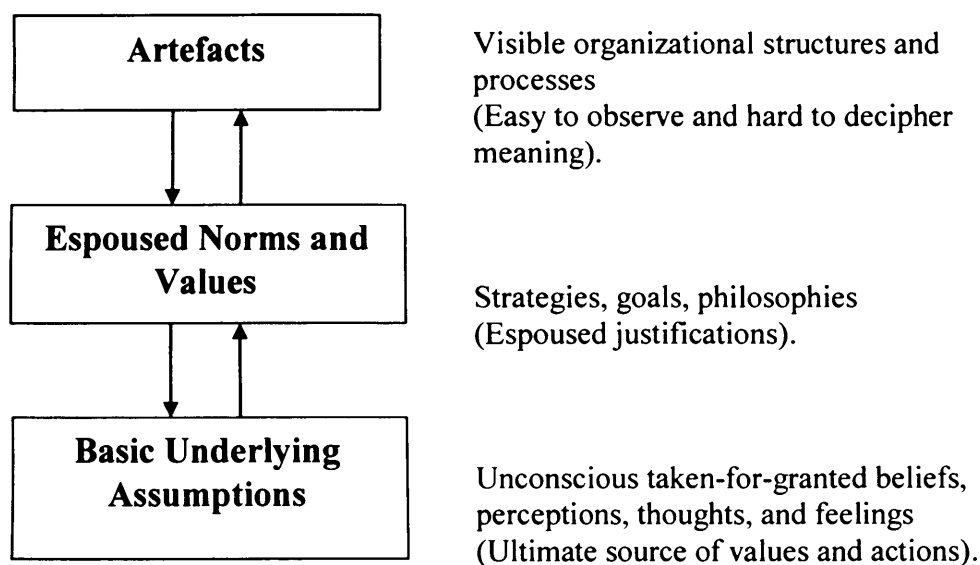


Fig. 2.3. Schein's model of culture

(Adapted from Schein, 1992)

Norms and values lie at the middle level of culture. *Values* are the social principles, goals and standards that define what the membership of the organization care about. This may include concepts like honesty and integrity, freedom, wealth, individualism, loyalty or democracy. Moral or ethical judgments are made on the basis of values. Values engender strong emotions and organizational members are able to recognise their values, especially when challenged or

threatened by change. Challenge to dominant organizational values is usually exercised by marginal members, newcomers or outsiders. *Norms* are similar to values and are the unwritten rules that guide behaviour within the social context of the organization. Thus, norms and values complement each other in ensuring that new members are socialised to behave in a consistent manner with the underlying beliefs and assumption in the organization.

Assumptions and *beliefs* are located at the lowest lever and form the core of the culture. According to Schein (1985), assumptions represent the belief system of the group. They define how reality is understood and influences what the group perceives and how they think or feel. These beliefs and assumptions operate below the level of consciousness and are rarely examined or questioned by the membership. It is 'truth' and not open to debate, and manifests itself in all forms of symbolic behaviour.

Schein (1985, 1992) suggests that top management can change culture when new values are introduced from outside the organization. However, Schein (1992) emphasises that these values can only become underlying assumptions when they have provided desirable organizational outcomes over time. He specifies two processes: via leadership imprinting and newcomer socialization, by which culture is created in organizations. Though Fig.2.3 above, illustrating the levels of culture, shows the arrows going both ways, Schein (1992) does not however, specify the links between artefacts, values and assumptions and how these lead to enabling processes of culture change and stability. His explanation has been criticised as indicating a 'one-way temporal chain of events', where the only possibility for change is limited to values being transformed to assumptions subject to social or physical validation (Hatch, 1993). Some researchers have also disputed Schein's assumption that cultures are unitary and have noted the existence of sub-cultures in their analysis of organizations (Martin and Siehl, 1983; Gregory, 1983). Others have observed that organizations may be sites of ambivalence and ambiguity and argued that a function of culture is not to maintain social structure (Martin, 1992; Meyerson, 1991). Researchers working under the symbolic-interpretive perspective have suggested that Schein's analysis of culture is incomplete as it neglects the importance of symbols in structuring and maintaining meaning within organizational settings (Alvesson and Berg, 1992; Czarniawska-Joerges, 1992). Despite these criticisms, Schein's concept of organizational culture remains widely used as a framework for analysis of organizational behaviour.

2.3.1.2. Martin's Three Perspectives Model of Culture

The three perspectives model of culture (Martin, 1992, 2002) was developed to address some of the perceived conceptual gaps in Schein's model of organizational culture. It has had an extensive influence on culture research by recognizing the existence of ambiguity within organizational settings and rejects the notion that cultures are unitary and uncontested. Martin (1992, 2000) suggests that cultures might either be viewed as integrated, differentiated or fragmented. This theory of organizational culture has generated extensive debate but has been useful in providing a framework for assessing different ways in which culture is perceived even within the same organization. This section will explore the perspectives in some detail.

Integration Perspective

The integration perspective is characterised by a pattern of consistency of interpretations across a range of cultural manifestations, organization-wide consensus, and clarity (Martin, 1992, 2002). It is believed that organization founders may be instrumental to the creation of culture. The emphasis is on homogeneity; consensus and a unitary culture. Fig. 2.4. below provides a graphic representation of cultures along a continuum illustrating the different culture states; from a unitary to a disorganised state.

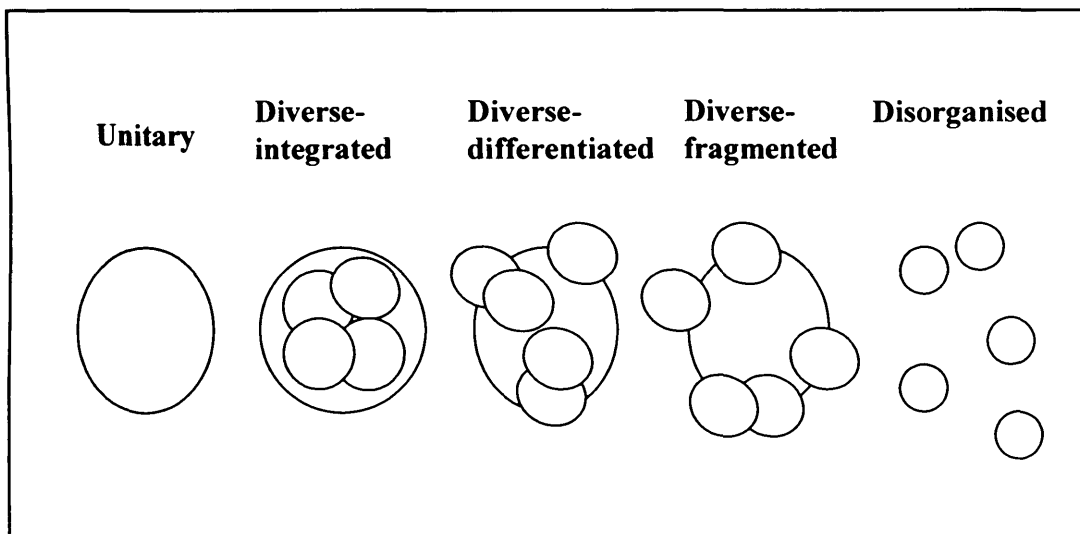


Fig. 2.4. A Culture continuum describing different states of Integration-Differentiation.

(Adapted from Hatch, 1997)

The integration perspective also conceptualizes culture change as an organization-wide phenomenon where a defunct unitary culture is replaced by a new relevant culture. Any

ambiguity or conflict that occurs in the interim is seen as evidence of the deterioration of the old culture before the new one becomes fully established (Schein, 1992). Dissent or resistance to the dominant culture is perceived as evidence of individual deviance, inadequate socialization procedures, poorly designed employee selection processes, a 'weak' culture, or perhaps a domain of organizational life that is not part of culture (Martin et al., 2004). Historical reviews of academic research from the integration perspective have been provided by Ott (1989) and Schultz (1995).

Research conducted from within the integration perspective includes both qualitative and quantitative studies. O'Reilly et al. (1991) designed a Q-sort measure which was derived from a content analysis of managerially oriented qualitative literature, consisting of 54 values said to characterise 'strong' corporate cultures. They suggested that job satisfaction was higher for new employees who shared similar values with existing members of the employing organization. Denison (1990) used questionnaire items to measure behavioural norms and these were correlated with various measures of financial performance. Quite a few integration studies have claimed that culture can be managed and used as a tool for improved productivity and performance (Beyer et al. 2000; Denison and Mishra, 1995; Kotter and Heskett, 1992).

Other integration studies utilize a more symbolic approach. For example, Pettigrew's (1979) seminal work describes how headmasters use rituals, stories and jargon to generate commitment to their school. Barley (1983) explores how funeral directors engage in a series of rituals and practices that maintain the illusion that death is life-like. More recent research includes Ashkanasy et al. (2000), who focused on organizational values and Zammuto et al. (2000) who examined the influence of managerial ideologies on innovation.

Research from an integration perspective might have a generalist focus, exploring a range of cultural manifestations such as rituals, stories, posters and symbols, or have a more specialist orientation, focusing on only one cultural manifestation, e.g. values.

Integration studies that claim a link between organizational culture and organizational performance face major conceptual and measurement problems (See Sparrow, 2001; Wilderom et al. 2001). The difficulty in controlling all the non-cultural variables (such as competitors' choices, product mix, prevailing economic conditions, and natural disasters)

which may affect firm performance needs to be addressed in any study. Siehl and Martin (1990) suggest that such claims of a link between culture and performance can only best be addressed through longitudinal, well controlled studies with in-depth generalist measures of culture across time. Until this is done, any claims of a link would remain tenuous and unproven.

Despite these limitations, culture research from the integration perspective continues to attract interest from practitioners and executives who would like to believe that culture can be utilised as a tool to engender widespread value consensus and ensure adoption of desired behavioural norms by their employees.

Differentiated Perspectives

Researchers working from the differentiated perspective recognise the existence of sub-cultures and incorporate this in their analysis of culture. Studies from a differentiation perspective tend to highlight three findings. Firstly, the interpretations of cultural manifestations are inconsistent, even within the same organization. Secondly, consensus occurs only within sub cultural boundaries. Thirdly, clarity is perceived only within sub-cultures, although some level of ambiguity may exist where there is an overlap between two sub-cultures (See Fig.2.4 above) Hence, sub-cultures may be viewed as islands of clarity in a sea of ambiguity (Martin et al. 2004). Studies from this perspective seek to penetrate the façade presented to organizational researchers in order to glean the realities that do not conform to managerial ideals. Differentiation researchers seek to integrate symbolic and cognitive aspects of culture with other material aspects of working life such as pay inequalities or institutional misbehaviour. This aim to achieve an in-depth understanding produces studies that are sensitive to the inconsistencies between espoused ideals and actual practice, between prescriptive attitudes and actual behaviour (Van Maanen and Kunda, 1989; Kunda, 1992).

There is no assumption that a unified interpretation of cultural manifestation would be realised in differentiation studies. Kunda (1992) notes how engineers paid lip service to company rituals aimed at exhibiting commitment to shared company values. When unobserved, these engineers used humour and sarcastic side remarks to express their scepticism and ambivalence. In a similar manner, Van Maanen (1991) describes how

Disneyland ride operators subverted management prescriptions of quality service by soaking obnoxious customers with water once the submarine hatches were opened.

Unlike integration studies, studies from the differentiation perspective are more sensitive to the environmental influences on culture in organizations. Indeed, the sub-cultures within organizations mirror and are mostly influenced by cultural groupings in the larger society (Ogbor, 2001). Culture change is seen to occur at the level of sub-cultures and only incrementally. Only in situations of organizational crisis and transformation, or during the formation of an organization, may culture change be influenced across the organization (Martin and Meyerson, 1988). The differentiation perspective therefore provides an empirically supported challenge to the integration assumption that culture may be perceived, shared and enacted by all employees in the same way (For an extensive review of this literature see Alvesson, 2002; Martin, 2002, 2004).

Fragmented Perspectives

The fragmented perspective can be defined as a postmodern critique of the differentiation perspective (Martin, 2004). It is focused on the same dimensions of degrees of consistency, consensus and clarity. However, it challenges the identification of sub-cultures based on dichotomous analysis (e.g., management versus labour or men versus women). Instead, advocates of the fragmentation approach suggest that interpretations of manifestations of culture are often multiple – neither clearly consistent nor clearly inconsistent; but rather containing elements of confusion and contradiction (Martin and Meyerson, 1988; Martin, 1992). Similarly, consensus does not exist across the organizations and may not be linked to any specific sub-culture. Rather, consensus amongst individuals is transient and issue-specific; producing short lived affinities until a new issue draws the attention of a different subset of cultural members, at which point it is promptly replaced (Meyerson, 1991). Clarity is then proposed as a dogma created by management and researchers in a bid to simulate the existence of meaningfulness and order where there is none. In this murky environment, culture no longer functions as an island of clarity in a jungle of uncertainty (Martin, 2004); culture becomes the jungle itself. According to advocates of the fragmentation thesis, the essence of any culture is pervasive ambiguity (Feldman, 1991).

Ambiguity is defined as paradox, irony, irreconcilable contradictions, as well as multiple meanings (Martin, 2004). Knowledge is power and power is diffused through all levels of the hierarchy and the organizations environment. Change is a state of constant flux, and these studies can portray alienation and apathy, as well as satisfaction and confusion (Alvesson and Deetz, 1999). The fragmentation perspective is clearly not useful as a guide to those interested in how to control the change process.

Studies from within this perspective include Brunsson's (1985) observations about organizational irrationality and hypocrisy, and Weick's (1995) observations about sense making. Meyerson (1991) studied social workers and observed how ambiguity pervaded work processes when objectives were unclear, criteria for achieving goals were not specified, and when it was not clear what success meant in that context. Robertson and Swan (2003) studied how highly educated consultants working in knowledge intensive firms, where project expectations were extremely fluid, complex and uncertain, coped with ambiguities inherent in their job.

There are strong opponents of this perspective. Schein (1992) rejects any suggestion that ambiguity reflects or is part of culture. Alvesson (2002) acknowledges that a careful study of organizational events might elicit elements of ambiguity or confusion. He questions the utility of a fragmentation framework for cultural analysis and argues that adopting a fragmentation approach ensures that the focus of the researcher would be to seek out ambiguity, and that this orientation might affect the course of the research. However, advocates of this perspective maintain that the advantage of this perspective is to alert scholars to be wary of the assumption that culture or sub-cultures may be defined by strongly shared values or a coherent, predictable set of norms and behaviours (Martin and Meyerson, 1988).

Martin (2004) suggests that, in practice, researchers examining culture from the three perspectives approach would need to identify a 'home' perspective, whilst being aware of the other perspectives. This is because at any point in time, any culture will have some aspects congruent with all three perspectives. She also noted that the boundaries of culture research have become increasingly permeable and negotiable, especially with regards to studies on internet communities and dispersed international work groupings.

2.3.1.3. Hatch's Culture Dynamics Model

Hatch (1993) developed the culture dynamics perspective as a means of extending and enriching Schein's (1985) conceptualization of organizational culture. Firstly, she introduces a dynamic and processual concept of culture by making the elements of culture (assumptions, values, artefacts and symbols) less central and highlighting the relationships linking them. Secondly, she recognises symbols as essential to an understanding of organizational culture (Hatch, 1993: 660). These were two of the key critiques of Schein's levels of culture discussed above.

She underlines four processes: *manifestation*, *realization*, *symbolization*, and *interpretation* as constitutive of culture. These processes form a culture circle and may move in either direction, prospectively or retrospectively (See Fig. 2.5 below). In order to address the contributions of this perspective adequately, it is necessary to provide a definition of these processes.

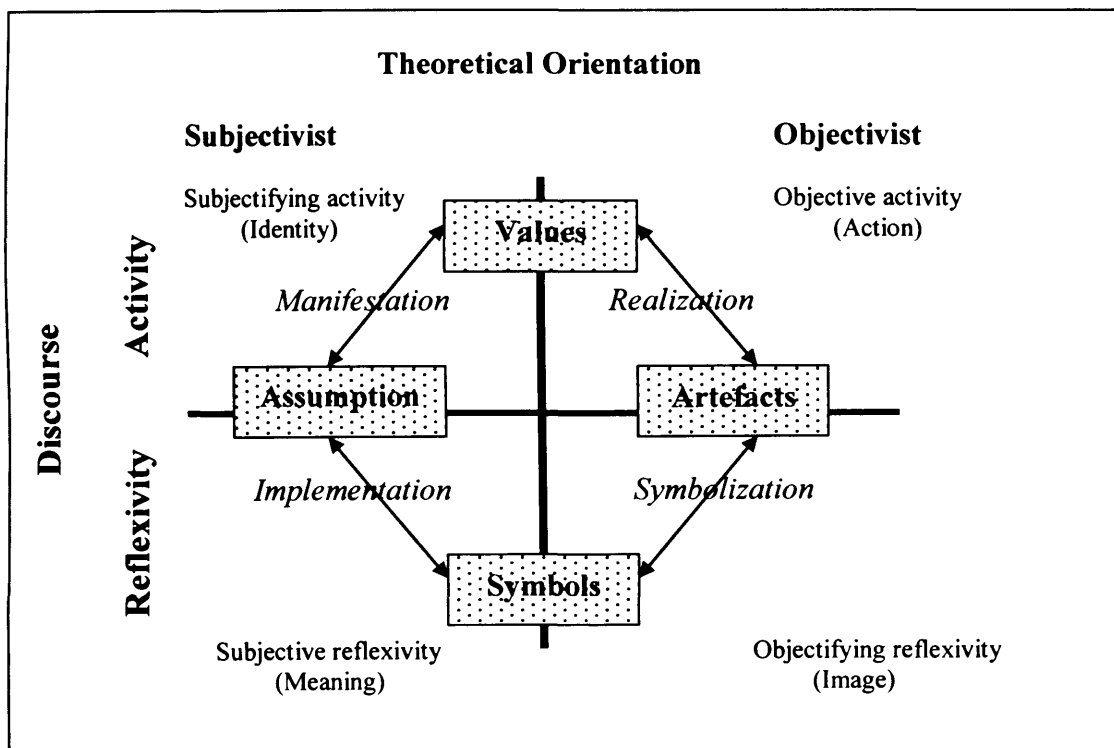


Fig. 2.5. The Domain of Cultural Dynamics. Adapted from Hatch (2000)

Hatch (1993) defines *manifestation* as any process by which an essence reveals itself, usually via the senses, but also through cognition and emotion (pg. 661). She argues that manifestation contributes to the constitution of organizational culture by translating intangible assumptions into recognizable values (proactive value influencing) or retroactively through value recognition that embeds values within taken-for-granted assumptions.

Cultural *realization* is defined as the process of making values real by transforming expectations into social and material reality and by maintaining or altering existing values through the production of artefacts (Hatch, 1993: 666). Thus, the meaning imbued in an artefact at the moment of its creation does not remain static but is modified over time as the context changes and different interpretive frames are applied.

Hatch notes that *symbolization* is a process that combines an artefact with meaning that reaches beyond and surrounds it. She argues that the difference between the full meaning of a symbol and its literal meaning releases 'surplus meaning'. Thus symbolization is a process that links an artefact's objective form and literal meaning with this 'surplus meaning' to enable the creation of symbolic reality (1993: 670). Artefacts must be translated into symbols if they are to be apprehended as culturally significant objects. Organizational members are seen as symbol manipulators, creating as well as discovering meaning in order to contextualize their activity and identity.

The cultural dynamics approach suggests that *interpretation* is a process whereby meaning is specified by locating the experience associated with a symbol within the broader context of a history of cultural meanings and geography of cultural artefacts (Hatch, 2000: 251).

Hatch (1993, 2000) recommends that these processes have certain implications for the study and analysis of culture. Figure 2.7 above highlights the interaction between theoretical orientation and discourse to provide certain analytical frameworks.

Hatch argues that the advantage of a dynamic conception of culture lies in the new questions it raises. Rather than focusing on what artefacts and values reveal about basic assumptions, it explores how culture is constituted by assumptions, values artefacts and symbols and the processes linking them. This view of culture also recognises culture stability and change as outcomes of these same processes (Hatch, 1993: 660-661).The culture dynamics model

suggests that change is continually occurring in organizations and the creative influences may emanate from leaders or employees as they reconstitute meaning within the context. Hatch (1993, 2000) further argues that change occurs with the introduction of artefacts into the culture and how these are converted into symbols and used for subsequent meaning making. Hatch summarized her conceptualization of culture by stating that,

“[The] Cultural dynamics model presents culture as two counteracting forces, one oriented around the production of artefacts (sometimes called material culture) and the other oriented around the production of meaning. Both forces have active and reflexive modes and also accommodate both objective and subjective views” (2000: 253).

The culture dynamics approach has been criticised for not clarifying at which level of analysis it may be applied. Additionally, it is unclear if the suggested processes are cognitive or social in nature. Hatch (2000) addresses these criticisms by arguing that the intersubjective nature of organizational interaction allows the processes of the culture dynamics perspective to be conceived as simultaneously cognitive and social. It was also advocated as a useful framework for understanding the processes by which organizational members construct a sense of individual and organizational identity by their interactions within a culture. This perspective also promotes the notion of *paradigm interplay* in order to advance understanding of organizational phenomena. She acknowledges the theoretical distinctions of the subjective and objective perceptions of reality (Burrell and Morgan, 1979) and suggests utilizing values and symbols as translation points between these two modes of theorizing so they may communicate with and enrich each other (See Hatch, 1993; Shultz and Hatch, 1996). The next section will explore the concept of sub-cultures and their importance for organizational analysis.

2.3.1.4. Sub-cultures

Researchers have long recognised that areas of ambiguity and conflict exist in organizational life (Smircich, 1983; Sackmann, 1992; Martin, 1992). Indeed, in his analysis of the culture concept, Pettigrew (1979) highlights the limitations of a unitary view of organizational culture. He argues that ‘culture treated as a unitary concept lacks.... analytical bite’ (pg. 574) and urges a multi-dimensional understanding of culture. In a subsequent work, Gregory (1983) demonstrated, using an ethnographic methodology, that in any organization, multiple cultures are likely to exist. These islands or enclaves of varied meaning systems have been

categorized as sub-cultures (Martin and Siehl, 1983, Martin and Meyerson, 1988), ‘native views’ (Gregory, 1983) or ideologies (Trice and Beyer, 1993).

Van Maanen and Barley, (1985) define sub-cultures as:

“a subset of an organization’s members who interact regularly with one another, identify themselves as a distinct group within the organization, share a set of problems commonly defined to be the problems of all, and routinely take action on the basis of collective understandings unique to the group” (pg. 38).

This definition closely mirrors the previous definition of organizational culture as shared, collective phenomena having particular cognitive and affective implications for the membership of the group. However, the definition does provide more scope for our understanding of processes whereby variation in sense-making and behaviour may occur within organizational settings. Fig. 2.6 below provides an illustration of different levels of analysis in the study of organizational culture.

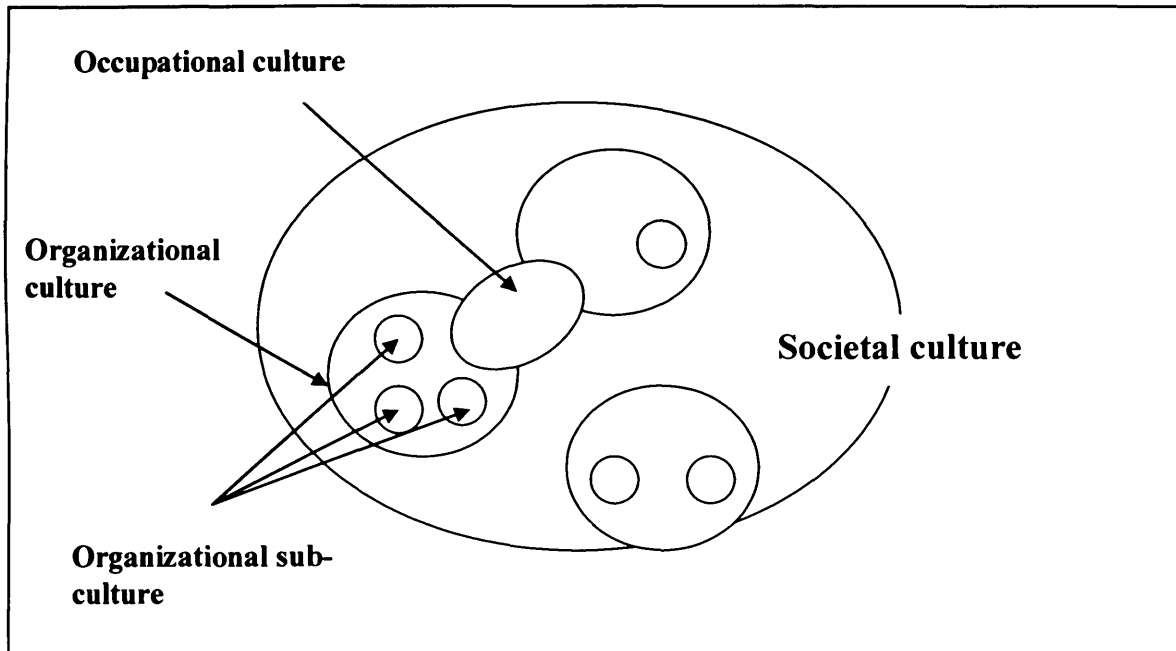


Fig. 2.6. Levels of Analysis in Relation to the Concept of Organizational culture

Douglas and Douglas (1994) argue that the term sub-culture may be misleading, leading to the presumption that a sub-culture is subordinate to the organizational culture. They acknowledge that this may occur early on in an organization’s life cycle or in small

organizations. They propose the use of an alternative term, 'idio-culture', to express the uniqueness of a group's culture. Idio-culture is defined as a "system of knowledge, beliefs, behaviours, customs, values and assumptions shared by members of an interacting group to which members can refer and employ as the basis for further interaction" (pg.24). For purposes of this literature review I prefer to use the term sub-cultures for the following reasons. The concept of sub-culture as defined in the literature is sufficiently broad to acknowledge the possibility of sub-cultural dominance. In addition, sub-culture researchers recognise that organizational culture is defined by the interplay and interaction between sub-cultures (Gregory, 1983; Martin and Meyerson, 1988).

Sub-cultures may be categorized by their relationship to dominant cultural values expressed within an organization. In this view, sub-cultures are classified as supporting, opposing or coexisting with the dominant values. Martin and Siehl (1983) suggest that Enhancing sub-cultures support the dominant culture with great enthusiasm. Counter-cultures defy the dominant values of the organizational culture. Orthogonal sub-cultures maintain their own values alongside the dominant values of the workplace.

Rosen (1991) distinguishes sub-cultures as either horizontal or vertical. Horizontal sub-cultural differences focus on functions, occupations or jobs that are roughly equivalent in status (Trice and Beyer, 1993), whilst vertical sub-cultures explore differences between high and low status employees (Van Maanen, 1991). The existence of occupational cultures that are shared amongst professionals across industries have been noted for their resilience within specific organizations (Van Maanen and Barley, 1984; Gregory, 1983). Examples include accountants or software programmers.

The view of sub-cultures has had a far reaching impact on studies on culture. Culture is now seen as much more complex and contradictory than it appears under the unitary concept of culture. A more differentiated view of culture (Martin, 1992, 2002) is advocated. Studies of organizational sub-cultures need to probe in-depth 'to penetrate the front' that organizational members present to strangers (Schein, 1985). It provides a useful framework for exploring issues of management control and employee resistance. In a study of ride operators in Disneyland, Van Maanen (1991) demonstrates how alignment of sub-cultures along hierarchical and vertical dimensions led to tensions in the interaction between ride operators,

supervisors and customers. The study illustrated the different meanings ascribed to events by organizational members. It also indicated that where consensus exists, it exists within sub-cultural boundaries.

Thus, sub-cultures have been perceived as potential barriers to managerially induced culture change (Harris and Ogbonna, 1998). In a conceptual paper, Harris (1998) theorises that sub-cultural dominance – the process by which one sub-culture assumes primacy over others, may be a function of relative sub-culture strength. However, the dynamics underlying this are unclear and require additional empirical analysis. A more detailed discussion of how sub-cultures continue along a continuum was discussed earlier under the section on Martins' (1992) three perspectives framework of culture.

2.3.2. FRAMEWORKS FOR UNDERSTANDING IDENTITY

The key theories developed for the understanding of identity have their origins in social psychology and were initiated to enable the understanding of individual activities within groups and how these interactions enable action. In this section I shall focus primarily on two theories: the social identity theory and the social categorisation theory. These theories seem to address in some detail the three key dimensions in our understanding of identity. These three aspects are the cognitive, social and emotive elements. Other theories such as the social learning theory and the social movements' theory do not address these entire elements adequately.

2.3.2.1. Social Identity Theory

The concept of social identity has been defined as 'the individual's knowledge that he or she belongs to certain social groups together with some emotional and value significance to him/her in this group membership' (Tajfel, 1972: 292). Three key aspects apply to this definition: firstly, an awareness of social belonging which highlights the interactions between self and other, and a need to fulfil a role and become socialised such as to act in a manner congruent to meaning systems with which the group identifies. Secondly, an emotional attachment to the group such that withdrawal from the group would initiate some feelings of

existential loss and anxiety; and thirdly, acceptance that group membership implies an acceptance of the values and behaviours of the collective.

The social identity theory (Tajfel and Turner, 1986) is a social psychological theory that is largely concerned with the underpinnings of intergroup relations and social conflict. The theory was originally developed in order to understand the basis of intergroup discrimination. They (Tajfel and Turner) observed that on assuming group membership, participants in the experiments engaged in a process of social competition and resorted to displays of in-group favouritism. Ulrich et al. (2005) argue that “the significance of this perspective lies in the fact that it enables us to acknowledge the dialectical relationship between organizational behaviour and employees’ self-concept that emerges as part of a qualitative shift from individual to group behaviour” (pg. 1551). The social identity approach has been explored extensively in the social psychology and organizational science literature following Ashforth and Maels’ (1989) seminal paper on organizational identity (See Haslam, 2001; Hogg and Terry, 2000).

Rao et al. (2000) argue that organizations derive their social identity from membership in formal groups and strive to maintain a positive identity and enhance self-esteem. They note that when group boundaries are permeable and the social identity of the organization is threatened, organizations tend to defect to other groups in a bid to maintain their identity and legitimacy. This study was focused on membership of two competing stock exchanges: the NYSE and the NASDAQ. The research highlighted the role of perceptions in guiding decision making at the higher levels. Members defected based on the belief that moving to a new, prestigious stock exchange enhanced their image and improved not just their sense of self worth and self-esteem but also their ability to engage in new business relationships.

The social identity theory has been critiqued for its inability to adequately account for the individual and his role in these social interactions (Haslam, 2001). The theory also does not explicitly address ambiguity and ambivalence in group identity but presents a unified and unchallenged conception of group membership. These criticisms make it unable to address completely the dynamics of intra-group behaviour.

2.3.2.2. Social Categorisation Theory

Social categorisation is a derivation from social identity theory which explores the *intra-group* dynamics of group behaviour. According to this theory, categorising oneself as a group member accentuates one's perceived similarity to the group prototype. In assuming this group prototype, one tends to enact the group identity- at least when the group is salient and engages in activities promoting the group over referent others (See Haslam, 2001). Thus, in self-stereotyping:

"Individuals react to themselves and others not as differentiated persons but as exemplars of the common characteristics of their group. It is through this process that salient or functioning social identifications help to regulate social behaviour; they do so directly by causing group members to act in terms of the shared needs, goals and norms which they assign to themselves, and indirectly through the perceptual homogenization of others which elicits uniform reactions from the perceivers". (Brown and Turner, 1981:39, Quoted in Haslam, 2001)

Hogg and Terry (2000) argue that this depersonalisation 'is the process underlying group phenomena' (pg.123). The self-categorisation theory is able to take into account the different levels of stereotypical abstract categorisations we apply to ourselves in particular contexts. This occurs as follows:

Levels of Categorisation	Example
Superordinate	Self as part of humanity
Intermediate	Self as part of a group
Subordinate	Self in personal terms

Table. 2.2. Levels of Stereotypical Categorisations (see Augoustinos and Walker, 1995; Hogg and Abrams, 1990)

Identification is, in part, a form of self-categorisation, which in itself is "inherently comparative and hence intrinsically variable, fluid, and relative to a frame of reference" (Turner et al, 1994: 456). However, this process of identification stabilises to the extent that there is some stability in the social reality within which it is embedded. Hence, though people in organizations tend to self-categorise at the level of their work group or team (for reasons of

proximity, task interdependence and familiarity), their focus of identification may shift to the organization depending on their interaction partners and the context (Scott and Lane, 2000).

Research on social categorisation describes how individuals in social environments interpret available information as evidence of the attributes and identities of others. In order to do this, two primary cognitive strategies are seen to play a role in the interpretation of social cues. These are the *theory driven approaches* and the *data-driven* approaches (Fiske and Taylor, 1991). In the theory driven approach, people rely on stereotypes or mental schemas as benchmarks for membership in particular categories. In the data-driven approach, people use available cues to construct a unique perception of the individual prior to categorisation.

In a recent review of the work of attribution theorists, Macrae and Bodenhausen (2000) conclude that the theory driven approach, which they refer to as the ‘intuitive politician approach’, relies on data reducing strategies quickly to process available data in order to place relevant others within an ‘acceptable’ stereotype. This process is said to be more common when the individual perceiver has insufficient time, motivation or cognitive capacity to make careful assessments, or when the perceiver wishes to make efficient and biased assessments which bolster their self-esteem and ego. This research indicates that information processing under this approach privileges cues which are most visually salient and data which is immediately available. On the other hand, perceivers relying on the data-driven approaches (also referred to as the ‘intuitive detective approach’) engage in data enlargement activities whereby available data is calibrated against previous knowledge and examined by observation to minimise the adoption of biased stereotypes. In her research on deciphering work place identities via office decor, Elsbach (2004) concludes that either of these processes may be used by organizational members in ascribing workplace identities.

For the purposes of this research the extended social identity theory (which encompasses the social categorisation theory) is seen to be adequate to address the cognitive, emotive and social elements of group interaction and identification that is the focus of the study.

2.4. ORGANIZATIONAL CULTURE, POWER AND CONTROL IN ORGANIZATIONS

A number of organizational culture researchers view culture as a form of social or normative control (Kunda, 1992; Barker, 1993; Ezzamel and Willmott, 1998). Indeed, Daft claims that 'the final implementation tool available to top managers is organizational culture. New research has discovered how culture fits together with other elements. The reason culture is important is that top management can directly influence culture through activities and symbols' (1986: 486). In order to assess these claims of culture as a tool of top management, this section will seek to explore the wider literature on organizational control.

2.4.1. The Domain of Control

Management control is primarily a process for motivating and inspiring people to perform organization activities that will further the organization's goals. It is a process for detecting and correcting unintentional performance errors and intentional irregularities, such as theft or misuse of resources (Berry et al. 1995: 18).

In a well known article, Cyert and March (1992) assert that 'individuals have goals; organizations do not'. However, Barnard (1938), in his definition of the organization, had already highlighted its purposive nature. Subsequently, Cyert and March (1992) acknowledge that the goals of the dominant coalition are essentially the goals of the organization. Thus, to ensure that the purpose of the organization is achieved, control includes both problems of regulating the formulation of purposes or goals, and of regulating the process of goal achievement. Goals have a symbolic and cultural significance as individuals might express commitment to an organization because of its espoused goals.

Etzioni (1961), in his analysis of organizations, distinguished between three ideal types: normative, utilitarian and coercive organizations. He notes that the nature of control existing within an organization would be influenced by the predominant relationship that exists between individuals and the organizational goals. Normative organizations exist where most of the participants share similar goals and values. Utilitarian organizations exist where the goals of the individual are irrelevant to the organization and the employment relationship is

merely contractual and instrumental. Most business entities are expected to be of this type and utilize several forms of inducements to attain goal achievement. Finally, there are coercive organizations, where the values of the participants are opposed to that of the dominant coalition. Here only the power of the dominant coalition can impose its values on unwilling participants. In practice, this typology does not take into consideration issues arising from the existence of sub-cultures in organizations and how these might result in a differentiated uptake of values and goals, even in a normative organization. In addition, even within the same organization, top management is expected to exhibit normative involvement and lower level employees, instrumental or coercive involvement (Berry et al. 1995). Thus, issues of power and the exercise of power, though less explicit in apparently normative organizations remain central through the manipulation of the subjectivity of employees. Thus, the study of power and control exhibits considerable complexity. I explore below how social controls may be introduced into organizations to complement existing structures.

2.4.2. Structures of Control

Normative control refers to socio-ideological processes designed to elicit the commitment of organizational members to desired goals and objectives (Kunda, 1992). As a form of social control, its power rests on the ability to provide symbolic rewards to members that exhibit the desired values, norms and behaviours. Normative control aims to complement the shortcomings of bureaucratic and technical forms of control. Its application might start at recruitment through ensuring a person-organization fit (O'Reilly et al., 1991), or through extensive socialization and indoctrination of an organizations' membership (Trice and Beyer, 1993).

Culture as a form of control may exist in either of two ways in an organization. When culture is viewed as a variable, then it functions as a management tool, providing the context for the design of control systems, and may itself be utilised as a source of control. This subtle control is achieved through corporate communication contained in rituals, stories, slogans and ceremonies which relay to organizational members desirable behaviours (Deal and Kennedy, 1982). If culture is viewed as a metaphor of organization, then control is portrayed in terms of systems of cognitions and beliefs, patterns of symbolic discourse, or manifestations of unconscious processes (Smircich, 1983). The control function of culture will be rendered

'invisible' through norms and values within the organizational context and only manifest in the way certain discourses are valued over others. Culture may thus function as a filter for perceiving the environment and guide individuals within the organization to act or make decisions in particular ways.

Culture may influence the effectiveness of control systems in two ways. First, culture may affect which aspects of a control system are perceived by organizational members, so that certain cues are sought and others ignored. Secondly, the culture affects what value judgments are made about the perceived cues (Langfield-Smith, 1995). The level of homogeneity of values affects the extent to which organizations may rely on informal versus formal forms of control. Culture theorists argue that a strong homogenous culture, where core values and assumptions are shared, provides a powerful source of control through the internalization of corporate objectives and goals (Schein, 1992; Deal and Kennedy, 1982).

Ouchi (1980) developed the notion of clan control and suggested that social control is exerted on individual members because they are part of a group and identify with its values. This concept has been extended in research into team working practices and indicate that normative control may present a darker manifestation under these conditions (Barker, 1993; Ezzamel and Willmott, 1998) leading to work intensification through a concertive form of group control. Indeed, Kunda (1992:214-21) suggests that under the environment of normative control, members 'have entered into a contract that is more than economic, one that must contend with overt external claims on self-definition.... In this sense, members have internalized the 'problem of control' that lies at the heart of the organization, and the private selves of members have become part of the 'contested terrain'. He concludes that 'Tech's engineered culture appears to be a pervasive, comprehensive and demanding system of normative control based on the use of symbolic power' (pg. 219).

Researchers have also shown that culture may be used in organizations to channel employees' emotional energies in a particular way (Hochschild, 1983). Describing how emotional control is utilised as a resource to get the job done, Fineman (1999: 300) notes, "Negative thinking is wiped out with scripts for all occasions". Indeed, individuals are likely to lose a sense of personal identity as a result of 'emotional enculturation' (Fineman, 1999). In his research in a high tech company, Kunda (1992: 214) observes that employees struggle to maintain a sense of self-definition when threatened by the need to demonstrate evidence of

incorporation and loyalty to an organizational culture that seeks to make prescriptions regarding one's thoughts and feelings. Self aware individuals note the contradiction posed by popular culture rhetoric, such as 'empowerment', especially when the same culture seeks to restrict employees self autonomy. Culture as a normative form of control is not introduced in isolation in organizations but incorporated as part of a package to extend and complement existing structural and technical forms of control (Scott, 1995; Legge, 1995; Delbridge, 1995; Ogbonna and Harris, 1998).

Critiques of culture or identity as normative control argue that culture or identity can become totalizing aspects of organizational life, determining what employees think, feel and breeding a new form of dependency. Employee identity is more tightly bound to occupational and organizational culture such that the extent of domination is glossed over and rendered invisible. As Rusaw (2000) points out, "domination is rooted in organizational ideology". This ideology expressed in the culture of an organization is "a systematic set of norms, beliefs, and attitudes that people accept unquestionably as guides for everyday thinking and behaviour" (pg.249).

However, employees still engage in subtle forms of resistance despite the totalizing nature of socio-ideological control. Collinson (1994) demonstrates that specific forms of knowledge, based on restricting information from management, are a key resource through which oppositional practices are maintained, and such action was linked to shop floor workers' concern to keep their identity and maintain distance from management. In another account, Ogbonna and Harris (1998) observe that employees may engage in behavioural compliance in a bid to avert attention from management, but do not actually adopt espoused values. Indeed, Ackroyd and Thompson (1999) argue that despite managerial claims of the domination of the workforce, employees are aware of and resent assaults to their self identity by pervasive forms of normative control. Though constrained by limited power resources from openly exhibiting their hostility, workers still engage in informal norms of organization misbehaviour.

Summary

The literature review has detailed the key definition of identity and culture in organizational research and examined their importance to our understanding of organizational behaviour. The examination of these definitions of culture and identity has highlighted that culture may be viewed in either of three ways: as cognitive phenomena, as symbolic phenomena or a combination of both while identity has been identified as a psycho-social concept which allows members to make sense of their associations and define themselves by the same attributes that define the organization. This review concluded that cognition and symbolism were essential to our understanding of culture and identity and proposed definitions of culture and identity that would guide the research. A detailed review was carried out to examine the main theoretical conceptualizations of culture and identity and how these have been useful to the study and understanding of organizational behaviour. The importance of cultural differentiation, even within the same organization, led to an evaluation of sub-cultures and their relevance in understanding organizational phenomena.

Hatch's (1993) dynamic theory of culture illustrated that culture and identity need not be viewed as a static property of organizations, but as a process of constructing shared meanings that is ongoing and argues for symbolism to be incorporated in earlier conceptualizations of culture. The notion of culture and identity as forms of social control was explored in some detail and a critique offered on its role in managing employee identity. The next chapter will explore how culture and identity may be examined through a relational framework.

CHAPTER THREE

LINKING ORGANIZATIONAL CULTURE AND IDENTITY

3.1 INTRODUCTION

The previous chapter has highlighted the importance of culture and identity to organizational research and practice. Both themes have been subjects of considerable academic interest and debate. Furthermore, both concepts have equally matured, moving beyond definitional concerns (Schein, 1992; Albert and Whetten, 1985) to more advanced theory development in the case of culture (Ogbonna and Harris, 1998; Alvesson, 2002; Martin et al., 2004) and in the case of identity (Brown and Starkey, 2000; Coupland and Brown, 2004; Kreiner and Ashforth, 2004; Simpson and Carroll, 2008). Over the course of their development, identity and culture have been conflated, used interchangeably, redefined and contrasted. Although these debates are not completely resolved, there is widespread acceptance that there are differences between both concepts (Fiol, et al., 1998; Hatch and Schultz, 2000; Corley, 2004). More recently, researchers have begun to explore the interaction between these concepts in a manner in which is designed to enhance our understanding of the subjective aspects of organizational experiences (Corley, 2004; Ravasi and Schultz, 2006; Simpson and Carroll, 2008).

The objective of this chapter is to demonstrate from a contemporary organizational studies perspective the linkages between organizational culture and identity them. A selection of previous research which have linked culture and identity will be reviewed and any conceptual gaps highlighted. Subsequently, the relational thesis of culture and identity will be introduced and its utility in explaining the linkages between these concepts will be evaluated.

This chapter will highlight the relevance of relational theory as a useful heuristic device for an appreciation of processes which are socially constructed and contextual. It will discuss the two dominant qualitative approaches to exploring organizational identity and culture and indicate how a relational approach would enhance this process. As such, this chapter will build on the specific analysis carried out in the previous chapters to broaden understanding of

exploring the meanings and maintenance of identity and culture within the case study organization.

3.1.1. Theorising Identity and Culture in Organizations

In the past 20 years culture and then identity have become important explanatory tools for organizational activities. Although research in these two areas has included several important quantitative contributions (see Douglas and Douglas, 1994; Van Riel and Balmer, 1997; Lipponen et al., 2005; Kreiner and Ashforth, 2004), the focus has shifted to a more qualitative appraisal of culture and identity in organizations (Ravasi and Schultz, 2006; Corley, 2004; Simpson and Carroll, 2008). In part this is a reflection of the increasing scepticism of academics to the utility of measuring socially constituted phenomena where some of the dimensions have not been fully appreciated. Furthermore, the difficulty of providing prescriptive solutions has made more qualitative approaches a more desirable option. Within the qualitative approach, there are predominantly two key frameworks that are used to explore identity and culture. These are the Institutional-led and the perception-led approaches. These have significant implications for the understanding of identity or culture. These implications will be illustrated briefly in Table 3.1 below.

Key Aspects	Institutional- led	Perception-led
Focus of interest	Institutions and social structures	Individual and organizational processes
Level of analysis	Mostly organization - Meso	Mostly individual – micro
Viewpoint	Researcher's	Employee's
Relevance of stakeholders	High	Low to moderate
Importance of image	High	Moderate
Relevance of legitimacy and	High	Moderate

reputation		
Analytical emphasis	Industry and stakeholder analysis – Processes and systems	Underlying perceptions and narratives – practices and behaviour
Importance of core Values	High – linked to external image	High – linked to cultural authenticity
Awareness of power and conflict	Low	High

Table 3.1: Differences between dominant qualitative approaches to culture and identity research.

It is understandable that these frameworks have emerged as they address two of the key challenges to identity theory: the identity of the individual and how this is psychologically bound with the organization and the question of how organizational identity or culture is formed, maintained and ‘managed’. However, as the table above demonstrates, these two frameworks provide useful information within particular silos, and as such there is very little cross-over between them, thereby neglecting important elements such as power, conflict and change. In order to theorise fully the relationship between culture and identity, this section will seek to analyse critically two papers which have attempted to link culture and identity, each adopting different frameworks and approaches.

The first of these papers by Alvesson and Karreman (2007) focuses on HRM processes as a means of understanding cultural symbols and identity maintenance. They state explicitly that the paper “suggests a reinterpretation of HRM systems and practices based on a cultural – symbolic perspective. It introduces the concepts of excess ceremonialism, identity projects and aspirational control and the various effects of HRM systems and practices on employee identity and compliance” (2007:711). And later, they claim that they “study HRM from a culture-identity perspective”. Indeed, the theoretical aim of the paper was “to develop a new, cultural-theoretical understanding of ambitious HRM, emphasizing its role in aligning individual and organizational identity” (pg. 712).

In their analysis, HRM practices are viewed as vehicles for the construction of meanings and the creation of stories about both the individual and the organization. In so doing, HRM

practices are implicated in the formation of identity at both the level of the individual and the collective. This study adopted a novel approach where it was suggested that HRM processes and practices do not just discover the individual as has been previously argued, but actually create the individual. Hence, there is a level of institutional and process determinism implicit in this assertion. I would argue that this contribution is of interest in developing a more socially constructive awareness of the organization. However, it also tends to portray the individual as lacking agency and awareness and coming into the organization without any pre-formed ideas or positions. This would obviously not be the case. A value-based approach, which I adopt within this thesis, recognises that individuals arrive at the organization possessing values which are pertinent in their respective contexts, and these values would interact with those proposed by the organization in varied and dynamic ways. The outcome of this interaction may be unpredictable, either leading to acceptance and compliance or leading to deviations from the expected value orientations and the creation of counter cultures.

In conclusion, the researchers suggest that “HRM may “work”, not in a techno-rational sense, but in terms of people sometimes using it for the construction of meanings, values and orientations... and to develop a positive self-view, partly associated with organizational affiliation” (pg. 721). Though this finding is significant and enriches our understanding of organizational life, it is limiting as it neglects to emphasise the sometimes cyclical nature of these relationships. In fact, previous definitions of organizational culture (e.g. Smircich, 1983; Schein, 1992, 2004) indicate that organizational values play a crucial role in defining organizational symbols and practices. This analysis does not highlight values as fundamental to the process of constructing meanings and does not indicate that in most situations values would influence practices and vice versa. Additionally, in this analysis, while there is some appreciation of the subjective interpretations of organizational participants, there is more of a discussion of the impact of structure and context on these perceptions. Individuals are discussed as agentic beings, but this is not clearly related to the structures and context that gives their agency meaning.

Indeed, Grugulis (2008:14) argues that it helps to illustrate if the “structure of work – the forms of work organization used in the firm” act as facilitators or constraints to employee opportunities. Thus, although Alvesson and Karreman’s (2007) study focused primarily on highly paid knowledge workers, it provides a useful framework which could be applied to

any workforce where there is an emphasis on skill which is demonstrated by enhanced task and role discretion.

In another empirical study, Ravasi and Schultz (2006) explicitly explore culture and identity dynamics as they occur within a case study organization undergoing identity threats. The authors claim that they “examine how organizational culture shapes responses to identity threats and, along with external images, drive identity dynamics” (pg. 433). They argue that culture is fundamental to sense-making and sense-giving processes which occur within organizations in response to external threats, and these processes will trigger the re-evaluation of organizational identity claims by the members.

To locate clearly the processes of sense-making and sense-giving, Ravasi and Schultz (2006) define two perspectives on organizational identity; the social actor perspective and the social constructionist perspective. According to the authors, the social actor perspective focuses on the actions of top management in directing attention of both external and internal stakeholders at desired identity aspects. As such researchers from this perspective reflect on identity as “those things that enable social actors to satisfy their inherent needs to be the same yesterday, today and tomorrow and to be unique actors or entities” (Whetten and Mackay, 2002:396). Within this view, there is a managerialist bias which is expressed by managers presenting institutional claims through a sense-giving process to influence the perceptions internal and external stakeholders may have about what is central, enduring and distinctive about the organization. Hence, the emphasis here is on stability, cohesion and consistency.

As Ashforth and Mael observed, “A collective identity provides a sense of self and meaning, and places one in a wider social context.... given the importance of an organization’s soul to its members, a certain degree of inertia is not only inevitable, but desirable” (1996:52-53). For scholars working from this perspective, they present the argument that unique values, beliefs and rituals may help organizational members validate identity claims and express their uniqueness. As Albert (1998:3) observed, “From this perspective, the relationship between identity and culture is clear. A particular culture [...] may or may not be part of the identity question: Who am I? What kind of firm is this?” Hence, an organizational culture may provide the stable internal context within which such questions may be asked.

Conversely, researchers from a social constructionist perspective view identity as evolving and emergent. As Ravasi and Schultz (2006) suggest, organizational identities reside in shared interpretive schemes that members construct in order to provide meaning to their experience. It may be possible that these shared meanings may not correspond to the official version of events. This approach tends to highlight the sense-making processes where members evaluate and negotiate meaning structures which are relevant to their sense of identity.

Ravasi and Schultz (2006) further suggest that both perspectives are integral to the construction of organizational identity and merely represent different aspects of the process. Hence, sense-giving and sense-making occur simultaneously within organizations. While the first approach emphasises institutional claims and how these are meant to channel understandings of stability and coherence, the second perspective highlights the role of human agency. It draws attention to the ability of organizational members to evaluate, negotiate and interpret what meaning these claims have on their understanding of their organization's identity.

Most importantly for this thesis, the study by Ravasi and Schultz (2006) reviewed organizational responses to external identity threats. In so doing they developed a theoretical model which highlighted five stages of response to these identity threats. These were, "Construing external images", "Reflecting on cultural practices and artefacts", "Revision of identity claims", "Projecting desired images", and "Embedding claims in organizational culture" (Ravasi and Schultz, 2006:442). This approach developed the thesis that organizations reflexively review their external environment and amend or modify their identity claims to reflect new understandings. Ravasi and Schultz (2006) suggest that embedding this new understanding within the organizational culture ensures long term stability and consistency.

This model however, does not fully develop the theoretical link between identity change and cultural embedding, and therefore loses an opportunity to highlight the relationship between these concepts. During further analysis of their data, Ravasi and Schultz (2006) observe that the organization focused on "restating and debating the fundamental values of the company, as these values were meant to provide foundation for strategic change" (2006:445). In order to define what was distinctive and unique about the organizations identity, there was a

concerted attempt to rediscover fundamental values. There was an argument that the organization had “lost touch with its heritage” (Ravasi and Schultz, 2006: 447). A participant in the study remarked, “values must be found within the company, not defined ... our values cannot be discussed: they are there where we have found them” (pg. 450).

This analysis highlights the importance of organizational core values as a key link between organizational identity processes and its culture. It is suggested that values are located centrally in definitions of organizational culture and identity (Schein, 1992), and although value labels may be defined at the top of the organization through a sense-giving process, the emergence of a shared understanding of the meaning of these values is dependent on interactive sense-making processes. Values thereby emphasise the relational nature of culture and identity. Key themes which are relevant from the study are the notions of authenticity and credibility of identity claims and how these are embedded in cultural understandings. Although the focus of this study by Ravasi and Schultz (2006) is on radical organizational change responses to external identity threats, they neglected to explore the function of core values. However, drawing on Ashforth and Mael (1996) study, they observe that “new conceptualizations must be socially validated to be internalized by organizational members” (pg. 450) and link this intuitively to the various manifestations of a common organizational culture – a claimed cultural heritage, yet they fail to discuss explicitly the role of values in this process.

Hence, the theoretical model suggested by Ravasi and Schultz (see Fig. 3.1 below) proposes organizational responses as a linear process ending with revised identity understandings. The dynamic component of identity and culture is lacking from this analysis and this gap will be addressed in the framework developed later within this section. This framework will seek to explore further the importance of values as linch-pins between culture and identity and the means whereby these concepts engage in mutual validation and authentication.

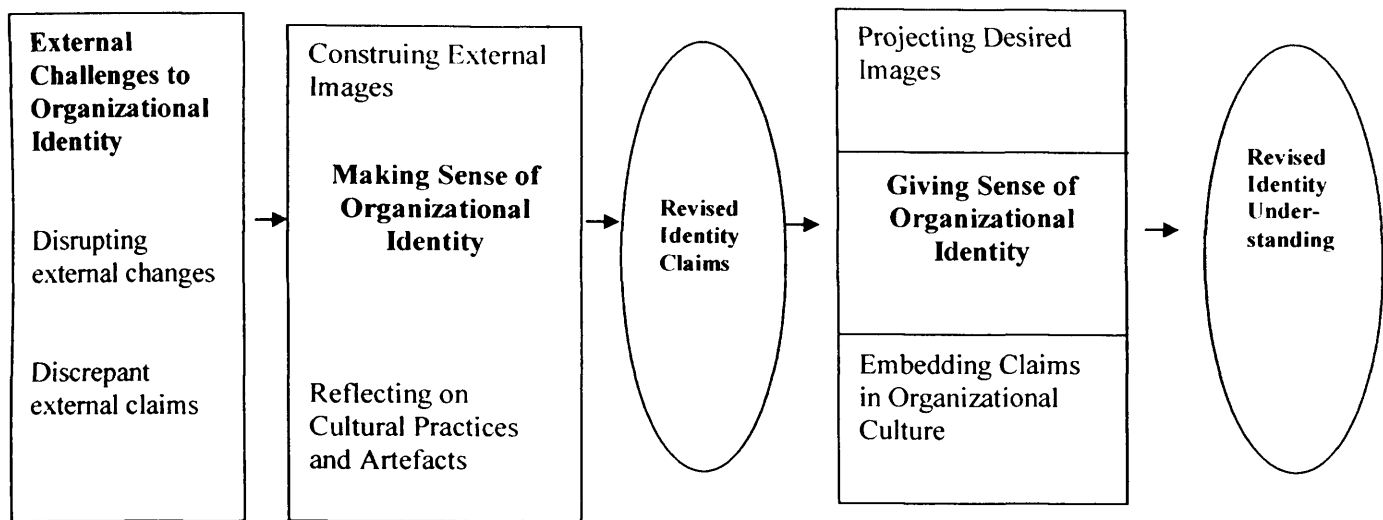


Fig.3.1. Organizational Response to Identity Threats Model (Ravasi and Schultz, 2006: 441)

It is proposed in this section that adopting a relational framework provides considerable conceptual opportunities to elaborate the importance of context, capture the dualities of continuity and change, tease out individual perceptions and highlight the effect of power within these processes in order to establish the link between organizational culture and identity.

3.2 RELATIONAL PROCESSES

Relational theory has been used within philosophy and physics as a framework to understand reality. This theory is founded on the assumption that objects or events are only meaningful relative to other objects and events. Within organizational behaviour there has been a growing appreciation of relational processes as a component of a social constructionist research approach (Van der Haar and Hosking, 2004). These processes have been used to recognise and give space to multiple realities, emergent ongoing processes and reflexivity. This approach is particularly applicable to such concepts as identity and culture where definitional overlaps exist and these processes are perceived to be ongoing and emergent (Hatch and Schultz, 2002). This enables an appreciation of both the influence of context; in

the form of institutions and processes and the individual's perception to our understanding of identity and culture.

However, this approach is not without its challenges. A potential challenge of this approach is in the adoption of an overly relativist approach to how concepts may be defined and conceptualised. Furthermore, the implicit power relations of who defines these relational concepts or connections prior to research may potentially dis-empower respondents and be construed as an attempt by the researchers to impose their own version of reality on the respondents. In developing this framework, relativism is avoided by applying a structured evaluation of key themes emerging from the literature which are common to both concepts. Additionally, the evaluation of these concepts as relational would be co-constructed through the research processes with the research participants.

The definitions of culture and identity provided in the previous chapter conceptualise organizational members as social beings embedded within organizational contexts who are sometimes shaped by these contexts but also influence these context through strategic agency. These definitions also highlight that culture and identity share a variety of characteristics but also vary along a range of dimensions. Hatch and Schultz (2002) theorised a number of relationships between identity and culture using a relational framework and the sections below would elaborate these further.

3.21 On Durability, Stability and Evolution

Culture and identity have been defined fairly similarly in the literature as shared organizational phenomena which draw on the symbolic aspects of the organization to provide members with a system of meaning and a way to address present challenges.

Culture has been variously defined as a core variable - amenable to manipulation and control, and also as an intrinsic aspect of organizations which cannot be extracted and manipulated at will (See chapter 2 for a full discussion). These definitions of culture have created different strands and understandings of culture, leading to culture optimists, culture pessimists and culture realists (Ogbonna and Harris, 2002; Legge, 1995). Culture optimists assume organizations as having a single culture which is strong and stable enough to provide

resources needed to deal with external challenges. When cultures are incongruent with their environment, change is suggested as a means of achieving congruence and stability. Culture pessimists argue that organizations are sites of contestations and social interaction and such interaction may result in a variety of sub-cultures, sometimes in alignment and at other times in conflict with the espoused organizational culture. Culture change is not always perceived to be a viable or desirable option. Thus, culture has been argued as having features of integration, differentiation and fragmentation (Hatch, 1997; Martin, 1992). Culture realists on the other hand suggest that culture change is difficult and may only be achieved slowly. This change may be partial or incomplete, resulting in behavioural compliance rather than real change (Ogbonna and Harris, 1998).

The definition of identity over the years has also focused on its perceived stable and enduring characteristics (Albert and Whetten, 1985). This perception of identity is closely aligned with the understanding of culture optimists who view the organization as possessing a single, stable culture which allows it to exist and thrive within its context. However, as has been demonstrated, this view of culture or identity as stable is problematic as it fails to appreciate the impact that changes in context, strategies and stakeholders can have in moderating these concepts. Thus, more recent analysis of organizational identity has highlighted its dynamic and fluid nature (Gioia et al., 2002). Gioia and Thomas suggest that we “soften the stricture on the conception of identity as more or less fixed to include a dimension of fluidity” (1996:394).

Similar to the view of culture pessimists, identity constructions have also been perceived as being sometimes unstable and evolving. Indeed, organizational identity has been viewed as “a continuous process of narration, where both the narrator and the audience are involved in formulating, editing, applauding, and refusing various elements of the ever-produced narrative” (Czarniawska, 1997: 49). This view of instability is premised on the understanding that organizations rarely consist of a single homogenous whole but is riven with fractures and divisions where different and sometimes conflicting identities may exist. This ties in neatly with studies of organizational sub-culture and the insights provided by the differentiation and fragmentation perspectives of culture (Martin 1992, 2002). Hence, both culture and identity are understood by researchers from the narrative tradition (Czarniawska, 1997; Alvesson, 2002; Brown, 1997; Coupland and Brown, 2004) as being instantiated by discourse and

narrative and as such always evolving to resolve or meet the challenges of the context. Arguably, organizational identity is incrementally adaptive to the needs of its stakeholders (Dutton and Dukerich, 1991; Scott and Lane, 2000) and occasionally unstable (Gioia, Schultz and Corley, 2000).

Thus, for the purpose of developing this theoretical review, culture and identity are acknowledged as concepts which evolve incrementally to adjust to changes in the context and meet the expectations of stakeholders.

3.22 Relevance of Values

Culture and identity are also related in that both enhance our understanding of how individuals interact with the groups and organizations in which they are participants. Central to both concepts is the importance of core values in providing some form of normative structure and guidance for organizational participants. Values have been referred to as a preference for one mode of behaviour over another or a preference for one end-state over an opposite end-state (Rokeach, 1968). Alternatively, values have been defined as “vague statements of intent” (Hannagan, 2008:48) which may be incorporated into mission or vision statements. As texts, values have the potential to affect organizational outcomes through altering behaviours. Language analysts suggest that values, as text, possess agency as they elicit particular responses on behalf of the organization (Cooren, 2004). Value-driven organizations have been considered more likely to be successful (Peters and Waterman, 1982).

In this study, values are regarded as specific, conscious and articulated concepts which are capable of arousing enthusiasm and are adopted by management as an alternative to hierarchical and bureaucratic coordination. Hence, similar to Pruzan (2001) and Kirkhaug (2009), values refer to codes, beliefs, standards, or codes of behaviour held by a group or individuals which define the means by which organizations should manage interactions with its stakeholders and fulfil its core objectives. These values are normally codified into texts; examples of such values may be honesty, integrity and respect for people (Pruzan, 2001; Schein, 2004). As aspirational texts they are expected to motivate employees to apply their skills and labour to meet the organizational objectives. Values may be explicitly

communicated by top managers through sense-giving processes via leaflets, internal communications and annual reports. However, values are transmitted more significantly through informal means such as organizational stories and legends, rituals, symbolic practices and organizational processes. It is assumed that values are capable of supplying employees with a common set of guidelines which may replace formalization and hierarchical control (Deal and Kennedy, 1982; Enz, 1988; Schein, 2004).

Organizational culture and regulated social identities have been implicated in ideological and normative control within organizational settings through the medium of values (Karreman and Alvesson, 2004). Further, Cheney (1991: 9) argues that “contemporary organizations do more than manage issues by inculcating values; they also manage identities”. The relevance of values to organizational culture and identity has been demonstrated to foster a sense of belonging and commitment to an organization, even where employees are deployed in disparate locations (Wiesenfeld et al., 1998; Clair et al., 2005). However, miscommunication of values within organizations may lead to confusion among recipients (Kirkhaug, 2009) and create organizational inertia (Weick, 2000).

4.23 History – Stories and Narratives

Researchers have observed that culture and identity are both products of an organization’s history, value systems, shared experiences, norms and collective sense-making processes (Schein, 1992; Dutton et al., 1994). The importance of myths, legends and storytelling has long been acknowledged within the literature of organizational culture and identity (Boje, 1995; Czarniawska, 1995). Indeed, some authors have argued that talk and storytelling can “do the work of organizing” (Boje, et al., 2004:576). Others have “elaborated a view of organizations as storytelling systems in which narratives have significant collective sense-making and identity-constituting roles, and are primary vehicles through which power is exercised” (Humphreys and Brown, 2007:412).

Within the organizational culture literature, researchers have attributed the emergence of particular cultures to their historical background, and in some cases to the influence of charismatic founders (Schein, 1992). The stories or myths which emerge from this history provides a shared sense of belonging and defines the organization as unique in its approach to

surviving and thriving within its industry. Hence, these myths and narratives are powerful symbolic materials that contribute to organizational sense making. Indeed, Martin et al. (1983) argue that organizational stories remain popular as they perform three motivational functions and facilitate identification within the organization. Firstly, these stories deal with issues of value conflicts. Secondly, stories offer ways for organizations and groups to take credit for positive situations and lay blame for negative ones. Thirdly, they provide an organization with a sense of uniqueness which members can identify with.

While drawing on historical resources, identity narratives may be both enabling and constraining. In essence, some people have identities constructed for them either by top management or by the recognition and status accorded their skills (Grugulis, 2007), and those with negative identities may strive to reposition themselves as legitimate participants in the discourse (Phillip and Hardy, 1997). Stories and narratives thus present political ramifications as they establish positions from which participants may engage each other (Fairclough, 1992; Parker, 1992). Hence, the relevance of history for these two concepts is in providing justification for actions carried out or positions taken up in the present.

3.24 Importance of Communication to Culture and Identity

Organizations use corporate communication channels to make identity claims to their various audiences. These claims are often abstract in recognition of the various and contradictory pressures and requirements of the diverse audience. The abstract and ambiguous nature of these claims makes them widely relevant to a range of stakeholders (Scott and Lane, 2000). However, where acceptance of these claims exists, this may be based on different interpretations of the claims being presented (Backer, 2008). In crafting these identity claims, either for internal or external consumption, organizational leaders “increasingly take the perceptions and reactions of organizational members into consideration in their formulations” (Hatch and Schultz, 2000:17).

Organizations engage in communications which when linked with key events within an organizational context are aimed at modifying their identities to meet the expectations of key and relevant stakeholders. In aiming to achieve this change, managers of organizational rhetoric and communication recognise the need to structure their identity claims in a manner

that is acceptable from the perspective of organizational employees (Ravasi and Schultz, 2006). Further, in acknowledging the relational aspects of organizational identity, these identity claims have to be relevant to, and acceptable to key external stakeholders (Czarniawska, 1997).

The importance of communication to organizational culture is much more subtle. Culture exists below the surface of organizational life and is hard to articulate. It is manifest through processes of sense-making. Culture-focused communication is utilised by organizational elites during transformation to embed a change programme, where there is a perception that the organizational culture is out of sync with its environment or strategy (Chreim, 2002).

3.25 Organizational Control and Regulation

As mentioned earlier in chapter 2, Ouchi (1980) argued that corporate culture is a necessary tool as it facilitates the creation of a harmonious working environment which limits opportunistic behaviour. Indeed, he suggests that when the transaction cost is complex and ambiguous for organizations, a set of common values and beliefs are required to act as a regulatory mechanism. Hence, these common values which reflect the core aspects and beliefs of the organization are manifested symbolically and explicitly in clearly articulated core values. This chapter suggests that core values act as bridging mechanisms between the concepts of organizational culture and identity, in keeping with Hatch and Schultz's relational thesis (2000).

3.3 CULTURE AND IDENTITY

Hatch and Schultz (1997:357) argue that, "culture needs to be seen, not as a variable to be measured accounted for and controlled, but as a context within which interpretations of organizational identity are formed and intentions to influence organizational image formulated".

Hatch and Schultz (2000), therefore, propose an elaborate notion of culture grounded in the organization theory literature, combined with understandings of organization image and identity. Image and identity have always been linked in the literature (see Goffman, 1959). In

a similar vein, culture has also featured in discussions of identity (Fiol, et al., 1998). However, attempts to integrate culture and identity for theoretical analysis are a more recent phenomenon (Hatch and Schultz, 1997, 2000; Ravasi and Schultz, 2006). This section will explore the relational thesis presented by Hatch and Schultz (1997, 2000) through an explanatory framework of the relationships between identity, image and culture (See Fig. 3.2 below). However, it should be noted that in exploring the utility of this framework, I am not suggesting that the focus of the research has changed. Within the literature, image is conceptualised as the view of and organizations identity which is projected to external stakeholders and may have an implication for internal identity construction through the feedback they provide.

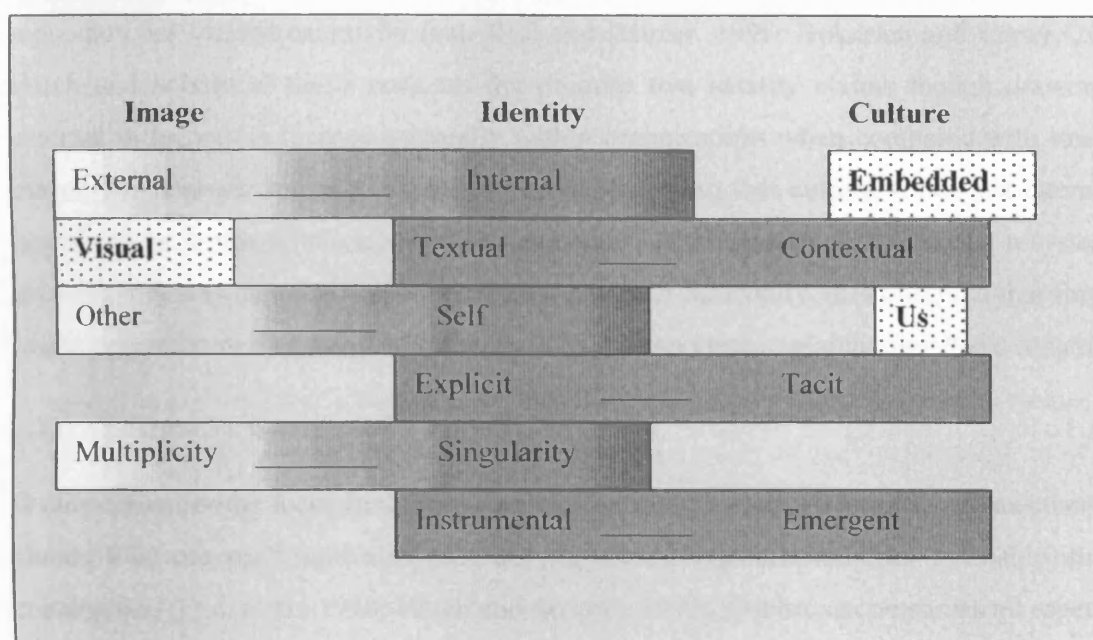


Fig. 3.2. Related differences between organizational image, identity and culture
(Modified from Hatch and Schultz, 2000)

This thesis suggests that culture, identity and image constitute three related aspects of a system of meaning and sense-making that defines an organization to its various stakeholders. The suggested relationships in fig. 3.2 will now be discussed in more detail below.

3.31 Internal Vs External Focus

Identity aims to adapt to, or to manage external social structures in a more obvious way than culture (Backer, 2008). In the relational framework presented above, Hatch and Schultz

(2000) argue that identity conceptualisations rest on an internal focus, relating to the responses or perspectives of organizational members or insiders. This is informed by how organizational members see themselves. Image on the other has been defined by Dutton and Dukerich (1991) as what organizational members believe external constituencies think of them. Other researchers have argued that image, like reputation, though focused on external audiences, poses a self-referential aspect (Whetten, 1997). These concepts are linked to how organizational members want to be perceived (image) and what members know of others' perceptions of them (reputation).

This is contrasted with the view from strategy and communications research where image and reputation are located externally (van Riel and Balmer, 1997; Dukerich and Carter, 2000). Hatch and Schultz's thesis rests on the premise that identity claims though drawing on external influences is focused internally within organizations when compared with image. I extend this analysis within the framework by suggesting that culture is not just internal to organizations in this relational view but embedded within the context to create a system of meaning which is unique to organizational insiders. Additionally, it is observed that for both identity and culture the notion of salient 'others' is important in maintaining these constructs.

3.32 Textual Vs Contextual

Culture provides the local context for addressing the questions organizational members ask about 'Who are we?', and also provides significant symbolic material to enable identity construction (Fiol, et al., 1998; Hatch and Schultz, 1997). Culture encompasses all aspects of organizational life. Organizational identity in contrast is narrated or articulated as a text in relation to the cultural context (Czarniawska, 1997). This narration is not perceived as fixed and may shift significantly within the same cultural context. Hence, the challenge of stability vs. change may be evaluated around the stability provided by the cultural context, while the change would involve the variation in the meaning of the text the organization uses in articulating 'who it is'.

3.33 Self vs. Other vs. Us

Research conducted on identity, image and culture tends to address different concerns. Studies conducted on organizational identity tend to explore how organizational insiders define, develop, sustain and express their organizational 'self'. Image researchers on the other

hand are seeking to understand how self-expressions or organizational identity claims are perceived and interpreted by 'others'. In contrast, culture researchers, seek to explore shared sense-making and group processes that distinguish the way an organizations' members interact with each other as 'Us'.

Though the notion of the 'other' is important in social identity theory and self-categorisation theory, the primary focus in identity research is how the self relates to others. The distinction between identity and image in this regard is less than clear. The notion of mirrored images has been explored empirically and found to have an impact on how organization members define their identity (Dutton and Dukerich, 1991). Thus, perceptions of identity influence and are influenced by our understanding of images others hold of us. However, the relational distinctions remain a valid means to distinguish both concepts.

3.34 Explicit Vs Tacit

Hatch and Schultz (2000) argue that identity construction by organizational members requires an explicit acknowledgement of the organization and their role within it. To further develop their notions of identity, the self-referential aspects impose a requirement for members to form a relationship with the organization while categorising out-groups (Dutton and Dukerich, 1991; Rao et al., 2000). In contrast, culture by definition is embedded within the structure of the organization. Hence, articulation of assumptions or meaning frameworks is hard to achieve (Schein, 1992). As a consequence, culture is generally acknowledged to be more tacit than identity. However, overlaps do exist. Culture artefacts and symbols may be as explicit as certain aspects of identity in articulating some of the underlying aspects of the culture, whereas certain aspects of identity may run deeper than some of the more explicit levels of culture. Image presentations would be quite explicit, taking into consideration the various requirements of the various stakeholders.

3.35 Multiplicity Vs Singularity

Research on image explores the range of stakeholders, both internal and external, to the organization, which may form images of the organization and potentially act on it. Hence, organizational image is perceived to focus on multiple stakeholders. Though culture and identity may be assumed to possess a more singular focus from the managerialist perspective, the notion of sub-cultures and fragmented identities suggests that singularity may not be

always applied to these constructs. Postmodern writers have argued that since identity changes quite often with circumstances then a single self may not be assumed. However, despite the possibility of fragmented and multiple identities, social identity theory suggests that for the individual employee, identity retains a primary foci or point of contact – the organization. Similarly, organizational culture would likewise be categorised as having a primary focus of interest – the organization. This is despite the notion of professional sub-cultures which may span many organizations, e.g. IT specialists or team based identities and cultures.

3.36 Instrumental Vs Emergent

In order to highlight a desired identity or to express that identity to others, symbols may be used instrumentally to raise consciousness among relevant stakeholders. Symbols which may serve this function externally include dress code, organizational logos or slogans. Hence, symbols are used in an instrumental fashion to reflect a desired identity. On the other hand, within organizations, cultural artefacts are symbolic media used for sense-making purposes. As such, these symbols reflect the lived experiences of the organizational members, but are not forcefully presented. It simply emerges as an aspect of the culture.

Thus a focus on culture analysis explores how organizational members maintain their interpretive schemes as a context for sense-making, while identity analysis focuses on how symbols and values are used in constructing organizational identity and projecting it to other salient stakeholders.

The analysis above highlights and partially resolves some of the definitional challenges that face culture, identity and image by providing a means of conceiving them as linked yet disparate constructs. The sections below will question why I need to link culture and identity.

3.4 WHY LINK CULTURE AND IDENTITY?

Researchers within the organizational and social theory traditions have long associated culture with identity (Fiol, et al., 1998). In some cases, these concepts have been used interchangeably or conflated. More recently, there has been an explicit attempt to link culture and identity within the organizational behaviour and marketing literature to gain additional

theoretical insights into the processes that govern organizational interaction and activity (Ravasi and Schultz, 2006; Hatch and Schultz, 2000). As discussed in the relational thesis above, culture and identity function not as opposing or contradictory forces within organizations. Rather, identity complements culture by adding an external focus to subjective internal sense-making. Narratives of self draw from the context of an organization's culture but are not limited by it. The self-referential requirement allows an organization to project this identity in the form of images to relevant stakeholders and provide a mechanism for validating core aspects of the organization.

In addition, culture and identity are similarly accessed at different levels of analysis; at the group, organizational, industry or national. However, identity differs from culture in having a significant amount of research and analysis conducted at the level of the individual person.

Within the organization studies tradition, the various philosophical frameworks have found the study of both identity and culture fascinating and fruitful. Researchers from the functionalist, interpretivist and critical orientations have drawn on the theoretical promise of these concepts. Habermas' (1973) three cognitive or knowledge-constitutive interests that underlie human enquiry; the technical, practical-hermeneutic and emancipatory have been usefully applied to the study of culture and identity. In these studies, researchers have sought to identify how these concepts may contribute to managerial outcomes (Haslam, 2001; Sveningsson and Alvesson, 2003), enhance our understanding of human cultural experience or transform meaning (Coupland and Brown, 2004, Ravasi and Shultz, 2006) or uncover issues of power, control and regulation (Reicher and Levine, 1994; Willmott, 1993; Alvesson and Willmott, 2002).

Most crucially, as organizational boundaries become increasingly permeable, and employees interact with organizations as both internal and external stakeholders, the risk of exposure becomes greater. Within this climate, scrutiny of organizational actions and how they align with espoused identity is likely to increase (Deephouse, 2000). It becomes important to explore how culture and identity research can combine to enhance understanding of organizational processes and systems. Applying a relational framework to this analysis complements and enhances previous research on organizational identity and culture by grounding individual perceptions within institutional and social processes.

3.5 MATCHING CULTURE AND IDENTITY

In the framework presented in Fig 3.3, organizational values are seen to be central to the interaction between culture and identity. Values are defined as an intrinsic component of culture. Schein (1992) suggested that values reside at the middle level of culture and define the social principles, goals and standards the organizational membership care about. In a similar vein, values are essential to the articulation of organizational identity. Identity claims are premised on what is perceived to be core to the organization- what distinguishes it from its peers and competitors. These claims are formally articulated as core values in organizational documentation, such as mission statements and annual statements or absorbed through collective understanding by organizational insiders. Hatch and Schultz (2000) acknowledge this connection when they observe that:

“Identity involves how we define and experience ourselves and this is at least partly influenced by our activities and beliefs, which are grounded and interpreted using cultural assumptions and values. What we care about defines us to ourselves and thereby, to some extent, forges our identity in relation to our culture” (pg.25).

In its simplest form, a four stage process is suggested. As mentioned above, culture resides at the base of the organization and provides the context from which identity may be expressed. Thus, core values are derived from the culture and expressed in the form of either formal identity claims or collective identity understandings of the features presumed to be central and relatively permanent in the organization. In order to articulate these relationships, Fig. 4.3 below has been developed.

On the reverse arrow from identity to core values, the formal identity claims have been communicated to internal and external stakeholders. Through interaction and debates these claims are either accepted as authentic representations of the organization’s identity, thereby validating the core values or by presenting alternatives or re-interpreting these values to fit the organizational context. These validated or modified core values are absorbed into the organizational culture, providing new standards and norms for organizational sense-making. Following the social constructionist approach adopted for this research, culture and identity are not perceived to be fixed concepts impervious to change. Change may occur incrementally, with members altering how they interpret what is central and distinctive about the organization. As observed by Whetten and Godfrey (1998), meaning and meaning

structures are continually negotiated among organizational members and, when there is substantial change, members have to ‘make new sense’ of what the organization is about.

The framework discussed below provides an analytical framework that bridges the gap between the internal and external aspects of organization. In so doing it recognises the importance of culture in providing a context within which identity might be expressed.

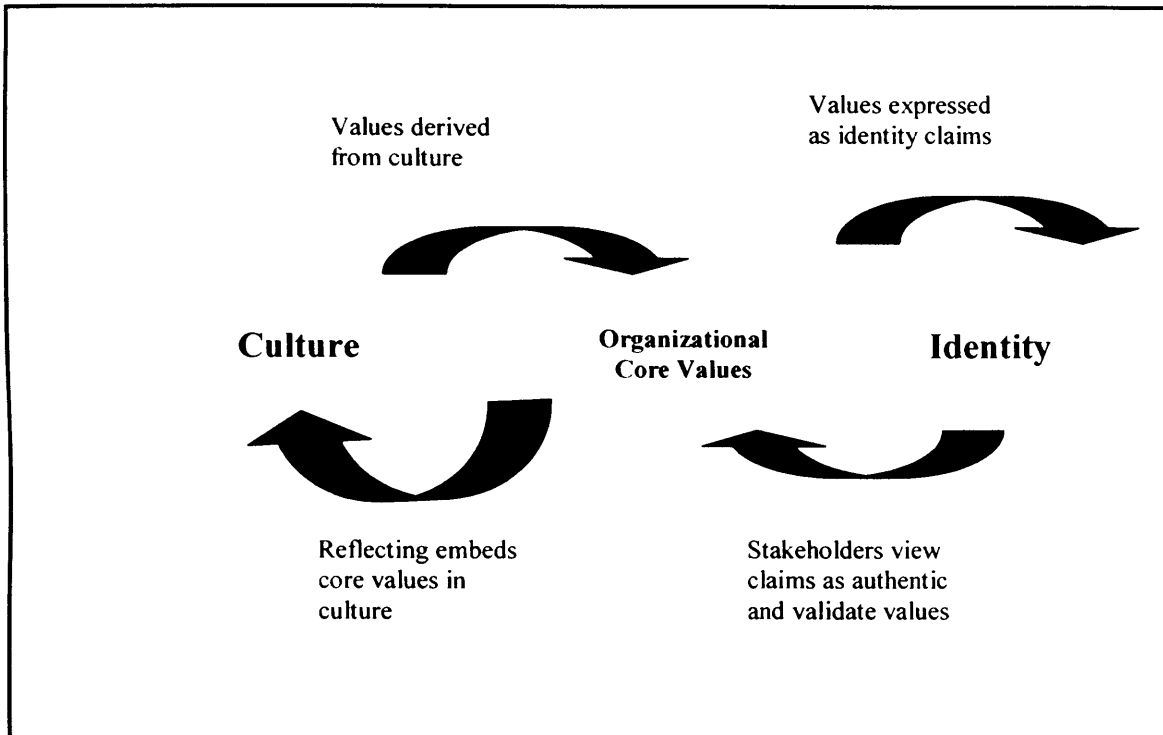


Fig. 3.3. Core Values as linkage between identity and culture – Theoretical Framework
(In the diagram above, the arrows are not meant to represent complete loops).

It is acknowledged that this interaction is not as linear as has been presented in the framework above. The influence of salient stakeholders, the organizational environment and the various competing self-narratives and sub-cultures would impact on which core values are seen to be relevant and survive within the organizational context. However, the framework should be considered a work in progress and is regarded as useful in highlighting some theoretical suggestions from the literature which may be explored empirically during the course of the research. Seven key themes were perceived to be relevant to this research based on theoretical insights from extant culture and identity literature and will be included in the interview schedule. These include knowledge of organizational values, organizational

identity claims (Coupland and Brown, 2004; Brown et al., 2005), socialisation practices, role definition (Corley, 2004), inter-group dynamics (Haslam, 2001; Lipponen et al., 2005), human resource practices (Karreman and Alvesson, 2004) and organizational communication (Chreim, 2002).

Summary

This chapter outlines and discusses the main theoretical and analytical constructs applied in this study. It presents an analytical framework which seeks to improve on previous frameworks that have been used in the understanding of culture and identity in organization by locating the individual's perspective within the context of institutions and social processes. It was highlighted that previous frameworks, while suitable for promoting our understanding of these concepts, were also limiting in neglecting issues of voice, power and context. The relational framework was proposed to remedy these shortcomings.

In particular, this chapter explores the various relational concepts which are integral to our understanding of culture and identity and suggest ways in which these concepts may be evaluated in a relational thesis. These concepts include the notion of multiplicity vs. singularity, textual vs. contextual, internal vs. external foci, explicit vs. tacit and instrumental vs. emergent dimensions.

Attention has also been drawn to organizational core values as essential components of the culture –identity dynamics. It is suggested that values play a role in validating and authenticating identity claims within a specific cultural context. Furthermore, values, while signalling organizational intent to stakeholders, also impact directly on employee behaviour by modifying perceptions of desirable end-states. The framework which has thus been developed is expected to illuminate our understanding by simultaneously reviewing and analysing empirical data from this research through a multi-level approach. This would enable an improved discussion of notions of organizational change and stability as it applies to these concepts.

Overall, this chapter posits that while there may be no one best way of examining culture and identity within organizational settings, the relational framework discussed above provides additional conceptual dimensions for understanding culture and identity. In the subsequent

chapters there will be an attempt to locate the research within the appropriate context and enable analysis and discussion along these lines.

CHAPTER FOUR

RESEARCH METHODOLOGY AND STRATEGY – KEY APPROACHES

4.1. INTRODUCTION

As discussed in the previous chapters, the objective of this study is to explore the interpretations individuals attach to identity and culture within an organizational setting. It seeks to provide some empirical data regarding the conceptualized relationships between identity and culture and observe the role several organizational context factors play in mediating this relationship. The focus of the research is on employee perceptions of organizational values and how these values shape their understanding of organizational identity and culture. A variety of themes were proposed as moderating contextual factors at the end of chapter 3 after a review of the literature and employee responses were elicited around these themes. In order to achieve this objective, certain methodological choices had to be made and this section will highlight and explain those choices. Additionally, the implications of these choices with respect to an interpretation and evaluation of the research findings will be examined. The tensions that exist between positivist and phenomenological approaches will be explored and discussed within this chapter. Furthermore, the decision to adopt a phenomenological approach in this study will be reviewed and justified.

The chapter will first detail the research purpose and questions and discuss some of the different research philosophies that guide organizational and social science research. This will include a review of key methodological developments, an exploration of how they have been applied in previous organizational studies and a discussion of the advantages and disadvantages of different methodological designs. This chapter will thus provide some justification for adopting a constructivist/ interpretive framework for the purposes of addressing the research questions.

4.2 RESEARCH PHILOSOPHY AND ORIENTATION

In conducting social science and business research, the main aim of adopting any particular research design or method is dependent on the ease with which it meets the research purpose and addresses the key research questions. The philosophical underpinnings of these questions have a variety of implications and are linked to ongoing debates about scientific reasoning and logic (Alvesson and Kärreman, 2000a; Tsoukas, 2000; Alvesson, 2003). Two key terms are particularly relevant and will be briefly defined. These are the concepts of ontology and epistemology. Ontology has one basic question – ‘what actually exists?’ Hence, it seeks to address key concerns about how reality is understood. Within social science research this term may also be referred to as research paradigms or philosophical approaches. Epistemology on the other hand, deals with the nature and scope of knowledge. It seeks to address the question of ‘what can be known?’. These two concepts are influential in deciding what is acceptable or desirable to study, how it may be studied and also provides some insight into the researcher’s frame of analysis.

A key aim of scientific research has been to search for universal laws or meaning achieved through some form of established enquiry which promotes the understanding of certain phenomena. However, this search is not unproblematic as invariably each scientist brings to their research their own subjective views on reality or the concept of acceptable knowledge. This point of view or philosophical bias affects how they discover and validate knowledge (Guba and Lincoln, 1994:195-220). Thus, the notion of reflexivity as a critical resource in social science research and its application in this study will be discussed extensively in a separate section.

4.2.1. Research Purposes

A research study may be guided by a single purpose or by a variety of inter-related purposes. Multiple and inter-related purposes have provided guidance for this research and this will be highlighted below. Firstly it seeks to enable an understanding of the dynamics of two key social aspects of organizational life: organizational identity and culture, and their implications for employee behaviour. This research also seeks to explore empirically the theorised relationship between these two social constructs: organizational identity and culture (Schultz

and Hatch, 2000). In order to understand better the processes by which these complex phenomena interrelate, examining employee perceptions within a case study organization was deemed appropriate. Secondly, the research seeks to explore how employees consume, modify and respond to culture and identity narratives within their work place. Finally, this research examines the various strategies by which organizations and individuals respond to threats to their identity when this is challenged by a range of social or environmental issues.

4.2.2. Research Questions

In order to achieve these aims, the key research questions were derived by an iterative process incorporating personal experiences, relevant debates in the literature and issues emerging from current organizational challenges. These questions tended to focus the research in a particular way and were instrumental in developing themes and deciding upon the appropriate research design. The key research questions were the following:

- i) How do employees perceive their organizational identity and culture?
- ii) How do organizational aspirational values contribute to the development, maintenance and coordination of organizational identity and culture?
- iii) How does the organizational culture provide a context for the expression of an organizational identity?
- iv) How does the organization communicate its values and/or identity to its various stakeholders?
- v) How do different organizational processes and structures interact to sustain or weaken organizational culture and identity?
- vi) How do organizations and their members respond to serious identity threats?

In order to create an appropriate framework for the research, available literature and research was examined to discover what themes were seen to be relevant. As highlighted in the previous chapter on the contextual framework, seven key themes were identified to be relevant to this research based on a review of the literature. These included knowledge of organizational values, organizational identity claims (Coupland and Brown, 2004; Brown et al., 2005), organizational socialisation practices, role definition (Corley, 2004), inter-group dynamics (Haslam, 2001; Lipponen et al., 2005), human resource practices (Karreman and

Alvesson, 2004) and organizational communication (Chreim, 2002). Context specific research was then conducted within the case study organization to ensure the relevance of the identified themes.

4.2.3. Paradigms and Philosophical Perspectives

As indicated earlier, this study is conducted within a particular interpretive framework. To make this framework explicit, this section defines the concept of paradigms, discusses the various types and justifies the choices guiding this research.

A paradigm or interpretive framework has been defined as a “basic set of beliefs that guide action” (Guba, 1990: 17). Some researchers distinguish between two main types of research paradigms or philosophical approaches (Gill and Johnson, 1997). These are the positivist approach and the phenomenological approach. Other researchers suggest that there are three key paradigms: Positivism, realism, and naturalism or phenomenology (See Wass and Wells, 1994) and represent different traditions of scientific enquiry. As a reaction to the so-called paradigm wars (see Czarniawska-Joerges, 1995; Denison, 1996), several authors (Datta, 1997; Patton, 1990; Tashakkori and Teddlie, 1998) propose “pragmatism” as a single alternative paradigm which would form the foundation of mixed methods research. Other researchers (Greene and Carracelli, 1997; Maxwell and Loomis, 2003) argue for a dialectical stance which assumes that all paradigms have something to offer and that the use of multiple paradigms contributes to a greater understanding of the phenomena under study. They suggest that this approach holds the most promise for mixed methods designs. What emerges from the literature is a debate which is active, ongoing and potentially irresolvable. Different researchers adopt the approaches with which they feel most comfortable and which they believe address the research questions competently.

The positivist approach assumes the existence of a discoverable reality and applies the experimental assumptions of natural science to social science research. A cornerstone of positivist research is a traditional emphasis on logic, clear control and measurement of the relationship between variables and a negation of subjectivity (Guba and Lincoln, 1994:105-106). As such it shares many characteristics with realism; for example, the notion that reality exists independently of our conceptual schemes, linguistic practices and beliefs. However,

realism goes a bit further and suggests that irrespective of our skilled attempts at attaining 'truth', whatever we believe now is only an approximation of reality and only constant searching brings us closer to understanding reality. The phenomenological approach on the other hand focuses more on the reports of personal experience and how this is construed and constructed by shared group activities (Guba and Lincoln, 1994). As a result, the phenomenological approach seeks an understanding of human actions through the exploration of the subjective meaning attributed to those actions by the participants. The phenomenological approach includes such methods as ethnography, social constructionist and critical realist methods.

A key difference between these two paradigmatic approaches is their focus on the varying levels of knowledge generation and abstraction. The positivist approach seeks to generalise data universally by utilising a trained observer to interpret the data very broadly. There is an assumption that data can be collected in a value-free manner and that 'the researcher is independent of and neither affects nor is affected by the subject of the research' (Remenyi et al., 1998: 33). There is an emphasis on the ability to replicate findings (Gill and Johnson, 1997). In phenomenology, the primary data is derived from observations, interviews or conversations and this data is then reflected upon based on existing literature and experiential accounts.

Increasingly, within the organizational sciences, researchers are acknowledging the insights which might be achieved by discarding the old dichotomy between positivism and phenomenology (Alvesson, 1993; Alvesson and Karreman, 2000). Indeed, there are assertions that a certain level of paradigm interplay is acceptable to broaden academic and social research. Within the field of cultural studies, Schultz and Hatch (1996) outlined how paradigm interplay may be encouraged and the expected outcomes of this approach. In marketing research there has also been a new acceptance of the use of a diverse range of paradigmatic approaches and combinations in representing marketing phenomenon (Brown, 2003).

4.3. THE RESEARCH PROCESS

The research process comprises a series of interlinked and inter-related activities. Frankfort-Nachmias and Nachmias suggest that “*the research process is the overall scheme of activities which scientists engage in, in order to produce knowledge*” (1996:19-20). This process is very appropriately represented by what Saunders et al. (2000) refer to as the research process ‘onion’ (see Fig. 4.1 below). This onion guides the entire research in a thoughtful and precise manner and takes into account the different ontological, epistemological and pragmatic considerations that the researcher needs to address to achieve the main objective; answering the research questions. This template will provide a rough guide to our discussion of the methodological issues in this research.

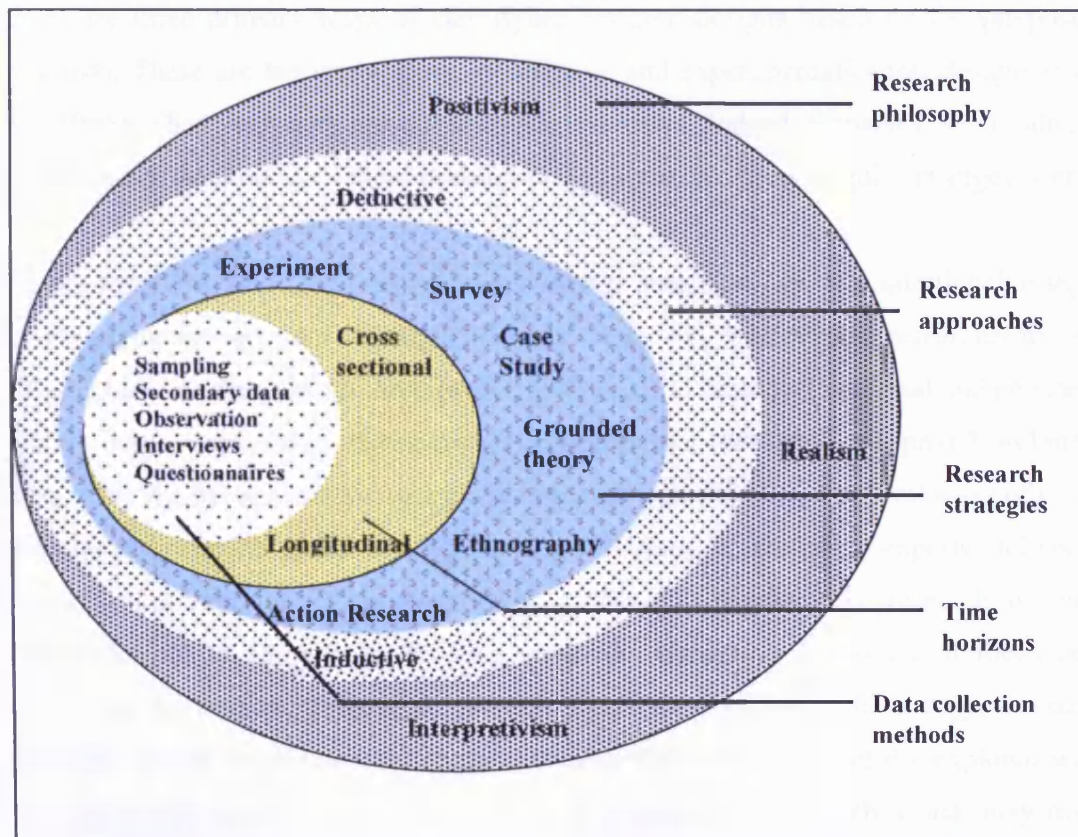


Fig. 4.1. The research process ‘onion’ (Saunders et al., 2000: 85)

However, the authors of the research ‘onion’ process fail to consider in any detail the analytical challenges which are implicit in the different assumptions put forward in the

'onion'. In addition, there is no explicit recognition within the onion that though research philosophies may be distinct, there may be instances where some overlap occurs in how these may be applied in a research setting. It tends to promote a notion of paradigm incommensurability which has been extensively challenged as a concept that limits social science research (Schultz and Hatch, 1996). The sections above focus on the different research philosophies and what impact these can have on research choices. In subsequent sections, the different layers of the onion will be considered in more detail.

4.3.1. Research Design

A research design is a procedure or framework for collecting data, analysing the data and reporting the research (Frankfort-Nachmias and Nachmias, 1992). In social science research there are three primary ways of classifying research designs based on the **purpose** of the research. These are the exploratory, descriptive and experimental/causal designs (Ghauri et al., 1995). These purposes are not mutually exclusive. Indeed, Robson (1993) indicates that you may alternate between these options as the direction of your inquiry changes over time.

Exploratory research is concerned with asking questions, seeking additional insights and assessing phenomena in a new light (Robson, 1993: 42). It allows the researcher to cast some illumination on complex research problems in order to develop functional and precise themes which may be explored in more detail. This is seen as a very flexible approach and may act as a basis for further exploration of a phenomena or event. There are several ways of conducting exploratory research which include literature searches, reference to experts and conducting focus group interviews (Saunders et al., 2000: 97). Exploratory research is commonly acknowledged to adopt a funnel-like approach, whereby a broad initial focus begins to narrow as the research progresses. Within the exploratory research strategy, a broad initial literature search results in more specific themes which are then usefully explored within the context of the research environment. This is a pragmatic approach which may result in a better and more effective use of research time and resources.

Descriptive research on the other hand seeks to 'portray an accurate profile of persons, events or situations' (Robson, 1993: 4). Descriptive research may adopt a narrative approach or be highly formalised in order to test propositions or enable theory generation. This may act as a

precursor or extension to exploratory research. Descriptive research may be conducted either as cross-sectional or longitudinal studies.

Causal or Explanatory research are studies which seek to establish cause and effect relationships between variables. Data emerging from the study are subjected to statistical tests in order to establish correlation between key variables. In such studies the researcher controls the independent variables and examines what effect this has on the dependent variable. The causal research approach is closely aligned to the experimental approach adopted in the natural sciences.

This study seeks to apply both exploratory and descriptive approaches at different phases of the research as it would be appropriate to address the research questions. How this application is conducted is discussed in more detail in chapter six.

Fig. 4.2 below represents graphically some of the key considerations in developing an appropriate design.

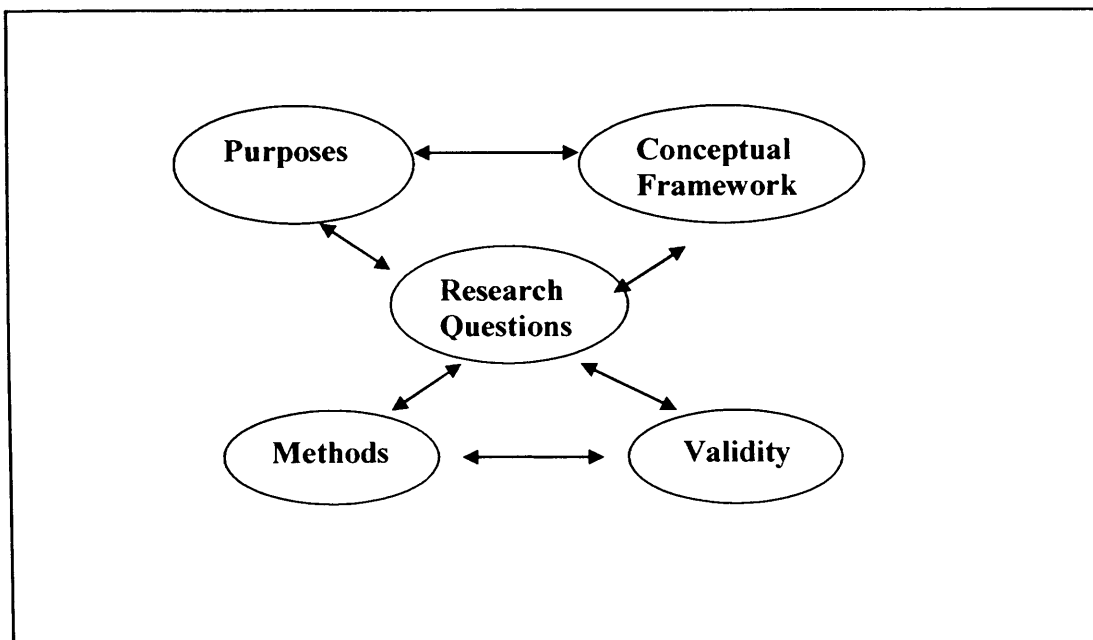


Fig.4.2. An interactive Model of Research Design (Maxwell and Loomis, 2003: 243)

An alternative way of defining research design is based on the orientation guiding the research. Thus, the research design may be defined as either an **inductive** or a **deductive** design or approach (See Fig. 4.1). These will be described below in more detail.

Inductive Research Design

The inductive approach commonly applies to qualitative research. As a variety of analytic strategies can be used legitimately within a research project, there is considerable debate as to what constitutes qualitative research (Coffey and Atkinson, 1996). However, it is widely agreed that qualitative research has two underlying themes. Firstly, it has been described as a process of data reduction that simultaneously enhances the meaning of data (Marshall and Rossman, 1995). It is thus seen as adequate for both theory generation and theory testing. Secondly, qualitative research includes little in the way of standardised instruments and procedures (Miles and Huberman, 1994).

Drawing from Burrell and Morgans' (1979) classic analysis of social science research, Denzin and Lincoln (2000) conclude that there are four major paradigms that apply to qualitative research. These are positivist-post positivist, constructivist-interpretive, critical-emancipatory, and feminist-post structural (pp.19-20). Similarly, Schwandt (2000) presents a more condensed view and suggests that there are three main epistemological stances for qualitative research: Interpretivism, hermenutics, and social constructionism. These stances cannot be discussed here in any detail due to space constraints, but this study aims to adopt a broadly social constructivist approach without being too relativist.

The social constructivist approach highlights the importance of culture, language and context in shaping and gaining knowledge. It denies that science provides any privileged access to an objective truth about the social world (Alvesson, 2003). A more radical social constructionist approach insists that organizations are discursive constructions and cultural forms which have no ontological status or epistemological significance beyond their textually created and mediated existence (Czarniawska, 1997).

As socially constructed, self-referential concepts, Corley (2004) suggests that organizational identity and culture are most appropriately studied through a qualitative research strategy in

order to explore the dynamic relationship between them. A variety of researchers have followed this approach with regard to identity research. Corley (2004) explored identity differentiation in an organization following a major transformation and utilised an inductive research strategy. Data collection was through interviews, archival documents and observation. The research concluded that perceptions in organizational identity varied along hierarchical lines contrary to previous assumptions that divisions would exist only along professional and functional lines. In a previous study, Pratt and Rafaeli (1997) found identity differentiation between doctors and nurses in the same hospital while Glynn (2000) describes the effects of different perceptions of organizational identity between musicians and administrators in an orchestra.

This research will adopt a pragmatic and reasoned constructivist approach. In line with our understanding of organizations as social institutions that are constituted through interaction, a subjectivist interpretive framework was seen as an appropriate means whereby a clearer understanding can be gained of the importance, scope, relevance and dynamics of organizational identity and culture within the specific organizational setting being studied. Indeed, in this regard, Fisher (1998) proposes that:

“Social science must attempt to explain how social groups construct their own understanding of that reality. Not only do such constructions constitute the most basic level of social action, their implications are fundamental to an understanding of the processes of social change, without which we would have little need for social science” (1998: 5).

He further argues that the pursuit of ‘facts’ by positivists through ‘value free’ or ‘value neutral’ orientations does not result in a full appreciation of social phenomena as “facts in the natural world as well as the social world depend upon the underlying assumptions and meaning” (Fisher, 1998: 4).

Deductive Research Design

This design relates primarily to quantitative research. As mentioned earlier, the key assumption presented about quantitative research is its positivist orientation and application as a confirmatory tool. Hence the researcher develops a model or makes some propositions regarding the nature of the investigated phenomena and a quantitative methodology is used to confirm or disconfirm these assumptions. The key theoretical drive is deductive. Quantitative

research has thus been typically directed at theory verification. Nonetheless, Punch (1998) has argued that quantitative research may also be used for theory generation.

However, because culture and identity are defined as shared constructs, researchers have equally attempted to conduct descriptive and causal studies exploring antecedents to identity formation and the implications for organizational behaviour (or misbehaviour). Mael and Ashforth (1992) developed a six item short scale to measure organizational identification. This scale and modifications of it have been used widely in recent empirical research and conceptual writings (Van Knippenberg and Van Schie, 2000; Kreiner and Ashforth, 2004), though doubts have been raised about its content validity. Abrams and de Moura (2001) contend that the Mael and Ashforth scale is predominantly focused on public expressions of identification rather than its subjective meaning. Furthermore, Van Dick (2001) argues that the emphasis of the measure is on the evaluative and affective aspects of identification and that the cognitive element of the scale is totally neglected. Despite these reservations, this scale continues to provide a basis for measuring identification empirically. A more recent single item graphic scale developed by Bergami and Bagozzi (2000) relies on a graphical representation of the merging of identities between the individual and the organization. This has formed the basis of variety of new studies (Dukerich et al., 2002; Shamir and Kark, 2004). However, as a single item scale this measure runs the risk of misinterpretation as it assumes the researcher and the participant have similar understandings about what it means to identify with the work unit.

Hence, the quantitative approach aims for the formulation of prior testable hypotheses and the use of experimental interventions with a comparison between test and control groups. Furthermore, random sampling, standardisation of methods and instruments, statistical hypothesis testing and a focus on causal explanation and replication are seen to commonly characterise quantitative research.

However, this is not to suggest that overlaps do not exist. Indeed, the entire debate about paradigm compatibility is based on the recognition that there are interactions, gaps, fissures and ruptures between the two approaches. Lee (1999) observes that the distinctions between qualitative and quantitative research is often blurred as both qualitative and quantitative techniques are applied within social science research. Hence, it is important to acknowledge what Greene and Carracelli (1997) term the “dialectical” relationship between the two

approaches where the differences cannot be ignored or reconciled, but rather acknowledged in the course of the research.

Table 4.1 below provides a summary of some key differences between quantitative and qualitative methods.

Quantitative Methods	Key Aspects	Qualitative Methods
<p><i>Objectivity: Facts exist and have an ontological reality.</i></p> <p><i>Primacy of method</i></p> <p><i>Development/ measurement of variables. Key relationships established</i></p>	Core Assumptions	<p><i>Subjectivity: No 'facts'. Reality is socially constructed</i></p> <p><i>Primacy of subject matter.</i></p> <p><i>Variables are complex, interconnected and hard to measure.</i></p>
<p><i>Researcher is distant from the data; 'outsider perspective'. An Etic approach.</i></p>	Viewpoint	<p><i>Researcher is immersed in the data; 'insider perspective'. An Emic approach</i></p>
<p><i>Outcome- oriented. Focused on causal relationships and predictions.</i></p>	Focus	<p><i>Process-oriented. Attempts to understand underlying perceptions/ interpretations of respondents.</i></p>
<p><i>Experimental and controlled conditions.</i></p>	Research Settings	<p><i>Naturalistic. Explores the richness of the context.</i></p>
<p><i>Formal and standardised instruments. Questionnaires, preset tests and rating scales.</i></p>	Instruments	<p><i>Key data collection instrument is the researcher.</i></p>
<p><i>Deductive</i></p> <p><i>Inferential</i></p>	Strategy	<p><i>Inductive reasoning.</i></p> <p><i>Descriptive.</i></p>
<p><i>Reliable, factual and replicable.</i></p> <p><i>Reliant on numerical indices.</i></p>	Data	<p><i>Contextual, valid, "rich" and "deep".</i></p> <p><i>Minor use of numerical scales.</i></p>
<p><i>Object for data mining</i></p>	Participants Role	<p><i>Co-participant in the research process</i></p>
<p><i>Detached, impersonal and neutral.</i></p> <p><i>Objective distance.</i></p>	Researchers Role	<p><i>Involvement and partial.</i></p> <p><i>Empathetic understanding.</i></p>

Table 4.1: Differences between Qualitative and Quantitative Research

(Source: Saunders et al., 2000: 92)

Mixed Method Design

The term mixed methods design may be applied when research strategies are used that are not normally described as part of that design (Morse, 2003; 192). Mixed methods studies have thus been defined as “those that combine the qualitative and quantitative approaches into the research methodology of a single study or multiphase study” (Tashakkori and Teddlie, 1998: 17-18). Mixed methods research may be conducted at two levels. Firstly, mixed methods may be achieved by the use of different methodological data collection devices. Secondly, this design may also be implemented by the application of multiple paradigms. Indeed, Creswell et al. (2003) argue that multiple paradigms serve as the foundation and basis for mixed methods research.

In applying a mixed methods design, researchers argue that there are four key principles that need to be considered (Morse, 2003: 193-195). Failure to adhere to these principles contributes to some of the key challenges of a mixed methods approach. The challenges or disadvantages include:

- Failure to address core concepts adequately, especially where the theoretical focus or drive has not been properly identified.
- Confusion regarding how these different components or paradigms relate to or complement each other.
- Addressing the concerns about methodological integrity and research rigor.

These key principles are detailed below. Firstly, it is suggested that the theoretical *drive* of the project needs to be recognised. Secondly, it is required that the researcher highlights the *role of the imported component in the project*. This principle requires a clarification of the role of the less dominant research design component. Thirdly, it is argued that the researcher would need to adhere *to the methodological assumptions of the base method*. And fourthly, it is recommended to *work with as few data sets as possible*.

Within the methods literature, mixed methods have been classified either typologically or systemically. Using the typological approach, Carracelli and Greene (1997) identified two basic types of mixed methods designs. The first was called “component” design, and the methods are implemented as discrete aspects of the overall inquiry and remain distinct

throughout the inquiry, and the second was known as “integrated” designs in which the methods are applied together throughout the course of the research.

The systematic classification defines mixed methods as either sequential or concurrent depending on the schedule for data collection and the implications for analysis. *Sequential mixed method* designs are a design in which one form of data (e.g. qualitative) provides a basis for the collection of another type of data. It answers one type of question, but the data collection occurs at different times. Inferences are based on the analysis of both types of data. It may be either explanatory or exploratory in focus (Creswell et al., 2003).

Alternatively, in the *Concurrent triangulation method* design, implementation of data collection occurs at the same time. In this design there is an attempt to achieve triangulation through data collection, separate data analysis and a subsequent integration of databases at the interpretation and discussion stage of the research project.

In practice, one of the methodological approaches may have priority in a Dominant – Less Dominant relationship. This would be represented by a capitalised formation e.g. **QUAL** → **quant**, and indicate that the qualitative approach is dominant while the quantitative is subordinate, and the research activities are conducted sequentially. When these methods are applied simultaneously, the indicators would be represented as **QUAL+ quant** (For a more detailed discussion see Creswell et al., 2003; Morse, 2003; Maxwell and Loomis, 2003). The implementation of data collection and the priority given to either qualitative or quantitative research may result from practical constraints of data collection, the nature of the research questions, the need to understand one form of data before proceeding to another, or the nature of the target audience. Ultimately, the decision would rest on how comfortable the researcher feels with one approach as opposed to the other (Creswell et al., 2003).

Mixed methods have been presented as having a utility far above the perceived ontological and epistemological challenges which have been highlighted. Indeed, Teddlie and Tashakkori (2003) suggest that there are three areas where mixed methods are seen to be superior to single approach designs. Firstly, mixed methods are able to address research questions that the other methodologies cannot. Secondly, mixed methods are seen to provide stronger inferences. And finally, utilising mixed methods approaches enables the researcher to present a greater range of divergent views. Elsbach (2004) explored how workplace identities may be

constructed and interpreted with reference to the symbolism attached to office décor. She utilised a mixed method approach, combining an initial exploratory questionnaire followed by semi-structured interviews to explore the three key research questions.

A mixed methods approach is thus able simultaneously to engage in theory generation and theory verification, thereby overcoming some of the methodological limitations of single method approaches. In order to gain the benefits of mixed methods research, Johnson and Turner (2003) proposed what they termed the fundamental principle of mixed methods research. They suggest methods should be mixed in a way that has complementary strengths and non-overlapping weaknesses. An appropriate example would be applying a case study approach together with a mailed survey or questionnaire. One approach, the case study, provides depth and the other, the mailed survey, provides more breadth, thereby increasing the scope of insight that can be derived from the research project.

Despite the above purported benefits, mixed methods approaches require some careful consideration during their application. Of primary concern is the relationship between the two components of the study and the persistent notion that paradigm incompatibility would nullify whatever gains may be achieved by mixing methods. In addition, mixed method approaches may only be appropriate where they proffer clear advantages over single method approaches in addressing the questions. Many researchers still express strong doubts regarding the utility of studying culture and identity quantitatively (Alvesson, 2003; Czarniawska, 1997).

After reviewing the strengths and shortcomings of all the research methods above, this research adopts an explicitly qualitative strategy to data collection and analysis. This is both as a result of individual epistemological premises and the requirements of the research questions. 'Truth' in social science research is neither white nor black but various shades of grey. The understandings attributed to events or situations is affected and influenced by the context. In light of this understanding, a qualitative strategy was the preferred option for conducting a research project. In addition, the twin concepts of identity and culture reflect the complexities of the social environment and the diversity of the individuals engaged in social interaction within it. The justification for adopting this approach will be further elaborated within this chapter, but it stems from an appreciation that culture and identity are socially constructed themes which are difficult to understand when abstracted from their context.

4.3.2. Research Strategies

At the inner level of the research onion presented in Fig. 4.1, different research strategies were highlighted. These included experiments, surveys, case studies, action research and ethnographies. Most of these strategies were discounted as they represent a research philosophy which is at variance with that chosen for the research. Experiments assume that reality can be measured and identified irrespective of the context. It is derived from the life sciences and is founded on a positivist epistemology. Surveys are the most common research strategies used in business and organizational research. However, some researchers have argued that the questions and scenarios used in survey research are typically vague and lack realism (Kavali et al., 2001). Similarly, some have argued that the “close-ended nature of the vignettes with attached semantic scales greatly facilitate empirical analysis, but in doing so lose insights into likely responses” (McDonald, 2000: 96). Ethnographies have a long history in phenomenological research within the social sciences. However, they require a depth of immersion within the target population which was neither possible nor practical in this research. Action research on the other hand tends to adopt a managerial and positivist orientation as the researcher seeks to modify or change the research participants in some direct way. This is contrary to the research purpose and orientation.

Consequently, a case study approach was selected as appropriate to answer the research questions, locate the research within its context and meet the philosophical preferences of the researcher.

Case Study Approach

In conducting social science research, the researcher often has to make a choice between a broad based or extensive research program and an intensive or in-depth study. In seeking breadth, an attempt is made to look across a population or industry in order to discover distinguishable trends and patterns or to test hypothesis usually with the aid of surveys. Alternatively, an in-depth or intensive approach looks at the totality of a phenomenon within a particular context.

Yin (1994: 23) defines the case study method as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between the phenomenon and the context are not clearly evident and in which multiple sources of evidence are used”. The definition above underlines the temporal and context-specific nature of the case study approach. Case studies focus on contemporary events or phenomena unlike histories. In addition, case studies are context focused in contrast to cross-sectional surveys which do not investigate the context very deeply but rely rather on the breadth of the approach. Finally, the use of multiple sources of evidence provides scope for researchers to either utilise a variety of qualitative data collection methods or to combine both qualitative and quantitative methods of data collection in order to meet their research objectives.

Case studies are particularly useful to explore the complexity of organizational processes. Hartley observes that “the strength of case studies lies especially in capacity to explore social processes as they unfold in organizations” (1994: 212). Case studies are widely used in organizational studies. Humphreys and Brown (2002) conducted an ethnographic case study utilising a broadly interpretive perspective to explore the symbolism of dress as a factor in identity construction and contestation within a Turkish academic faculty. Data collection was achieved through 42 semi-structured interviews and a study of varied documentation and observation. A narrative approach was applied to analysis and presentation. Similarly, Coupland and Brown (2004) utilised a case study approach to study how organizational identity was constructed on the web at Royal Dutch Shell. Relying on web page discussions and narratives, their research unearthed issues such as control and hegemony of web spaces, ambiguity and ambivalence around identity positions, and identity defence.

This study aims to adopt an intensive approach and focuses on a single case study organization. The reasons for this choice lie primarily in the context specific nature of the concepts under study. Researchers have observed that culture and identity are both products of organizations’ history, value systems, shared experiences, norms and collective sense-making processes (Schein, 1992; Dutton et al., 1994). Furthermore, the objectives of the study seek to explore in detail employee perceptions of identity and culture within a single organization in order to discover what meanings and influence these concepts have for the lived reality of the participants. An intensive approach provides the best opportunity to explore and gradually build explanations around these key concepts.

This case study will operate at two levels: Firstly, at the level of individual employee perceptions and, secondly, at the organizational level. The assumption guiding this multi-level approach is that organization-wide discourses may best be illuminated in the lived reality of individual organizational employees (Sveningsson and Alvesson, 2003). An extensive approach was considered but not seen to be appropriate as a survey would provide aggregated responses without providing any illumination regarding why participants responded the way they did.

The literature therefore suggests that a case study approach most closely meets the research objectives.

At the core of the research onion, we have the various data collection strategies which may be applied within any research. This will be discussed in more detail in the following chapter which deals with 'doing fieldwork'; applying the chosen research method within the fieldwork environment.

Summary

This chapter has highlighted the research purpose and key research questions. A brief review of the key methodological approaches was conducted in order to explore the alternative ways of conducting social science research. In so doing, ontological and epistemological choices have been made and justified as relevant to addressing the research questions and meeting the objectives of the research. The next chapter will explore how these methodological choices were applied during the research.

CHAPTER FIVE

RESEARCH METHOD AND DATA COLLECTION STRATEGIES – FIELD APPLICATION

5.1 INTRODUCTION

This chapter aims to address the challenges of applying the chosen research method during fieldwork. As discussed in the previous chapter, a qualitative case study approach was chosen to meet the research objectives. This chapter will begin by discussing the importance of reflexivity both as a mindset and as a guide to practice, and also how this was applied throughout the research. The following sections will review the challenges of negotiating access, applying a sampling framework and defining the role of the researcher within the research environment. This discussion would then expand to cover the literature on data collection methods and provide some justification for choices taken during fieldwork.

This chapter will further explore the literature on methods of theme development, coding and analysis, and highlights the approach that has been adopted in developing the analytical themes for this research. This will be followed by a review of the different ethical standards that were adopted throughout the field work period. It reviews the approaches used in data collection and the maintenance of a research protocol.

Finally, the last section explores the options that would ensure that the research meets the requirements for academic rigour and the relevance of the concepts of validity and reliability, or rather veracity and verisimilitude, as it relates to this research. Throughout the chapter, there will be an emphasis on how there was continual need for adjustment, refinement and re-evaluation of the research strategy, which reaffirms a reflective approach to research practice.

5.2 The Theory and Practice of Reflexivity During Fieldwork and Analysis

Self-examination is a deeply ingrained and mostly unconscious human trait. Socrates is attributed with the following quote, “an unexamined life is not worth living”, as he was led off for execution. In a similar vein, G.H. Mead noted that “the apparatus of reason would not

be complete unless it swept itself into its own analysis of the field of experience” (1934/1962, pg. 138 quoted in Stronach et al., 2007: 179). Some researchers (Ashmore, 1989; Latour, 1988) have further argued that the socially constructed nature of all knowledge requires that we introduce a reflexive understanding of the process and action of discovery. Thus, there is widespread agreement that introducing a reflexive dimension to social enquiry is desirable.

Reflexivity as a methodological approach in qualitative research refers to the process whereby a researcher reflects upon the research process to understand their impact on the process, and reapply that understanding for better practice. It implies examination, discovery and recursive action. Macbeth makes mention of “positional reflexivity” (Macbeth, 2001: 37) where attempts are made to align “methodological rigour with a critically disciplined subjectivity” (pg. 39). He also considers “textual reflexivity”, which draws on the well known “linguistic turn” in anthropological research (e.g. Clifford and Marcus, 1986). However, it may be an illusion to develop models of reflexivity as there is agreement that all these different modes of thinking could exist simultaneously within any research project. Indeed, Deleuze (1994) suggests that any such attempts at exactness and replication constitute a “transcendental illusion” (pg.265). A recent methodological paper clarifies that reflexivity “suggests a complexification of thinking and experience, or thinking about experience. Thus, we regard reflexivity as a process of exposing or questioning our ways of doing” (Hibbert et al., 2010:48). Hence in practice, researchers may consider reflexivity as a set of instrumental practices or as a fully conceived integrated process. They suggest that, “In our characterization of this process we contend that an instrumental view of reflexivity may, as part of a research process, be a means to ends type of thinking and within conscious activity. A fully conceived view may largely be an unconscious act for some researchers” (Hibbert et al., 2010: 48). Whichever approach that is adopted by the researcher would influence the “degree to which the researcher is genuinely open to the other, rather than choosing to filter and challenge concepts that emerge in dialogue against the standard of their existing understanding” (Hibbert et al.,2010: 50).

Thus, for the purposes of this research, I would argue that adopting an explicitly reflexive and recursive approach to fieldwork design and practice has been beneficial. In practice, this involved acknowledging my presence within the research setting and embracing any insights this provides. Furthermore, this entailed highlighting any concerns, within the text, where my analysis may have been influenced by prior knowledge. Finally, this necessitated that I

reviewed my findings and analysis, with respondents, for further clarification. These approaches considerably improved both the quality of interactions with respondents and the quality of the interview data delivered at the end of fieldwork. I had to be alert to the possibility that my previous tenure within the organization might have some influence on the interview process. For this reason, I had to create a distance, for myself and for the respondents, from my previous tenure in the organization. This was both during the iterative question/ theme design and the data collection process. I also had to be aware of the need for recursive reflection during the latter data analysis stages.

There were two common applications of reflexivity during the question design and data collection phase. Firstly, during the cognitive testing component of question/ theme design, I was constantly receiving feedback on how to improve the questions, their delivery and the targeted audience. Some of this feedback was integrated. However, in making a decision of what feedback to discard, I had to draw on my knowledge of the organizational context, reflect upon the best options for providing coherent responses to my research questions and make a judgement. An example of feedback which was considered and later discarded was the suggestion that I target my questions to experts in those areas. For instance, this would entail sending questions on human resource processes to the HR department before-hand so they could consider their responses and respond adequately. This specific feedback was ignored, as the outcome would likely be scripted texts representing the organizational position rather than the perceptions of individuals on the function and effectiveness of these roles. Information on the strategic direction of SPDC was obtained from publicly stated objectives on the Shell website/ archival material and interviews with Shell managers. Additionally, the purpose of adopting a social constructionist research approach would be defeated as I would only target those in power within the setting and ignore the dynamics and impact of interaction within the organization. Every employee's perception of the organization's values and identity was equally relevant to the research, so I continued with the approach of targeting a cross-section of organizational respondents. Another feedback was the desirability to specifically target field workers who worked either on drilling rigs or flow stations. The perception was that these staff felt distant and isolated from organization, meaning making media as internet access was quite limited and interaction with top managers was patchy at best. Identity formation and maintenance in these areas were considered particularly difficult as it relied mostly on the ability and disposition of middle managers to convey consistently the values of the organization. However, despite my best efforts to gain

access to these field locations, I was denied access by the organization due to security concerns. Attempts to speak to field staff as they came off their shifts on their weekly breaks met with very limited success.

Secondly, this reflexive awareness was necessary during the data collection phase as respondents to interviews constantly made allusions to my time in the organization. For example, I noticed it was quite common for respondents to abbreviate or summarise their responses with such phrases as 'you should know all that as you were in HR' or 'I guess I don't need to elaborate as you are still one of us', or most commonly 'you know...'. In order to counter this common mindset, I reminded the respondents, where possible, that I had been out of the organization for quite a while and the important issue was their own understanding and views rather than mine. I would then try to ask more searching questions to tease out their own understandings of the issues under discussion. Where this clarification was not possible during the data collection phase, I carefully integrated a reflexive approach in the analytic process. Where such phrases were used frequently and I was unable to elicit further clarification from the respondent, I would examine what my own understanding of the situation was and seek to clarify if this was representative of the respondents view through a follow up contact. Where this contact could not be achieved with the specific interview respondent, I sought to clarify the viewpoint with an organizational similar, e.g., if the missing respondent was a 33 year old male with a supervisory role held for 5 years in the organization, I would seek clarification with someone with similar characteristics. Though not always ideal, this approach ensured that I was able to consider critically every interview and glean the most out of the responses.

During the review of audio media, to facilitate editing and coding of responses into relevant themes, I noticed that on some interviews I had taken on a more aggressive or assertive role. This was ostensibly in order to manage time more effectively and interrogate issues more proactively. However, the unintended consequence of this approach was to sometimes ask leading questions and possibly guide respondents to a given response. There was, therefore, a real danger that I was likely to validate my own biases and opinions. To ameliorate this concern, I reviewed such responses for their consistency with other responses from the respondent throughout the course of the interview. Where variations or deviations existed, I sought to clarify these responses during follow up contact. Most importantly, I became more conscious of this trait and suppressed it during subsequent interviews.

While conducting the interviews, I noticed that quite a few of the respondents commonly used the term 'the company' in an anthropomorphic sense. Here, they seemed to imbue 'the company' with an identity and decision making powers. Quite curious at this development, I used concurrent and retrospective probing to ascertain who 'the company' was, or how 'the company' was perceived. Some respondents indicated that 'the company' referred to the directors, others suggested that the company included both current power brokers within the organization, such as directors and senior managers and also those up and coming staff who were being groomed for the future. The term 'Ok LNG' was used in a jocular fashion to refer to this cadre of staff. Further questions around the use of this term uncovered that this meant those staff who were certified as being of the right quality to deliver Shell's vision of dominating the Liquefied Natural Gas (LNG) market. Hence, the term frequently used in certain circles to capture this concept was 'OK LNG'. Others used the terms 'golfer' – referring to staff who took up golf as a means of mingling with top managers who commonly played golf, or 'high-flyer' for those staff who were either recognised high performers or whose future potential was ranked very high. It was not unusual for employees to claim they were stakeholders within the organization and suggest they fully identified with the organization and also distance themselves from the elite and power bases within the organization. There was a clear perception that there was an 'in' crowd within the organization, and some employees were constantly striving to breach the boundaries of this group. This observation implied that there was a sense of alienation for some staff from the power bases within the organization. There was thus the possibility that such perceptions may have an impact on employees' ability to identify fully with the organization. Applying a reflexive and recursive approach ensured that this potentially important theoretical issue was identified and explored further during the thematic coding and the data analysis

In summary, a pragmatic understanding of reflexivity is taken forward in this thesis. It is accepted that though there may be a tendency to take a stance in terms of significance or 'location' within the research setting, that stance is constantly mobile and negotiated. Conducting reflexive research should not be a self-indulgent exercise restricted to the subjective experiences of an individual researcher, who seeks to locate his identity as I=I, rather it would occasionally require a bouncing off from others, both in terms of ideas and positions, in order to locate both yourself and the impact of this self on other selves. Reflexivity is therefore more a chance than a model (Garratt, 2003). It is both a way of thinking and an opportunity taken. I therefore agree with Marcus that there is a need to

acknowledge a “theatre of complicit reflexivities,” variously emplotted (Marcus, 2001: 524) within each research setting.

5.3. FIELD PREPARATION AND CHOICES

5.3.1. Gaining Access

It needs to be acknowledged that the researcher had previously worked within the HR function of the case study organization for more than 5 years. Hence, there was significant organization capital and resources which could be tapped to ease entry into the target organization. Access was initially negotiated through the Department of Petroleum Resources (DPR) which regulates the oil industry in Nigeria. A formal letter of authorization was obtained from this department which allowed me access into the case study organization for data collection and academic purposes. I followed up this tentative access agreement with direct contact with a senior manager in Shell Human Resources who indicated that access would be granted at the highest level. This form of access through organizational gatekeepers is seen to be distinctly advantageous. This is because alignment with powerful groups within an organization could enhance opportunities for data collection. However, this relationship became problematic when the manager resigned as a result of some internal review on ethics and best practice! The details were not entirely clear and this course of access was immediately discontinued in order not to prejudice the research.

Further contact with the organization required an alternative route. This involved sending in a formal application, supported by the principal supervisor, requesting placement on the organizations’ sabbatical and student placement scheme. This was accompanied by a detailed summary of research aims and objectives, timeline for the research and expected deliverables. This application was successful and a preliminary medical appointment (as is required for all new employees) was confirmed. An agreement was reached with HR and the academic liaison unit that I could resume fieldwork once a complete medical check up was completed. I travelled to Lagos, then corporate headquarters of Shell Nigeria (and economic capital of Nigeria). Initial attempts to complete the medical examinations in Lagos proved unsuccessful due to faulty medical equipment. Medical examinations were finally completed in Port Harcourt (oil producing capital of Nigeria and Shell’s operational headquarters) following a

spate of emails and negotiations between the Shell University liaison section and the Shell medical department.

Following a successful medical examination, partial entry into the organization was achieved while awaiting the provision of an official letter of appointment, ID cards and office allocation. This provided opportunities for observation based research. Subsequently, I was assigned as an intern to the transformation team (responsible for monitoring change and transformation within the organization) and encouraged to participate in organizational activities. Properly structured research could now begin.

5.3.2. Sampling Framework

In developing a sampling framework, theoretical factors were considered. The literature on organizational identity and culture makes some predictions regarding categories that may be usefully evaluated. These factors include position in the hierarchy (Corley, 2004), professional and functional disciplines (Pratt and Foreman, 2000). Pragmatic choices necessitated some opportunistic sampling. There was a need to adjust for the various nested categories within the organization. This was achieved by taking into consideration the gender, age and availability of employees in making sampling decisions.

5.3.3. Research Sampling

The data sampling process for the research was in two phases. Firstly, the sampling was conducted for the first stage of data collection; the semi-structured interviews. This was followed by sampling for the second stage of data collection; selected respondents from whom it was believed additional insight into organizational processes could be gleaned.

Phase One

It was important that complete access to the total population of the organization was obtained. This was achieved by getting hold of the complete list of staff on payroll through contacts within the HR function. There were 5500 staff on payroll. This list included Shell Petroleum Development Company Nigeria Ltd (SPDC) expatriate staff, Nigerian staff, expatriate contract staff and Nigerian contract staff (on fixed term contracts). Though the

variety of staff working on company premises tended to include a wide range of other contractor personnel, staff on payroll were acknowledged to be the staff for which the company was directly responsible. Hence, programmes at maintaining identification with the organization were directly targeted at them and to a lesser extent at the other more contingent parts of the workforce.

In developing an effective sampling strategy, it was important to determine if the characteristics of the workforce were entirely homogenous, hence suggesting the need for a random or systematic (where every *n*th sample was taken) sampling approach. Observing the composition of the workforce, the literature on organizational identity and culture suggests that variations in location, functional/ professional affiliations, length of stay in the organization, sex, level in the organizational hierarchy, education may all have different impacts on the patterns of culture appreciation and identification with the organization (Ogbonna and Harris, 2002; Corley, 2004; Sveningsson and Alvesson, 2003; Thomas and Davies, 2002). Thus, in studying the perception of these employees in relation to organizational identity, the sample was perceived to be heterogeneous and sampling decisions had to be more strategic and stratified.

The stratified approach to sampling suggests that the population needs to be divided into significant and meaningful sub-groups based on such factors as gender, location, occupation, salary groupings, organizational tenure etc and selections made at random from within these groups. This was the approach followed in creating the sample for the semi-structured interviews. A stratified sampling method was used to select an initial ambitious list of 200 staff which was later reduced to 100 focusing on staff within the sample that were accessible. This was a pragmatic strategy as some of the employees were field workers who worked shift patterns and the organization discouraged field visits due to safety concerns (community disturbances, travel challenges and kidnap concerns). Additionally, concerns about time constraints on the research process also guided these choices.

Phase 2

The sampling for the next stage of data collection; the in-depth discussions, was more complex and tended to combine both strategic and random sampling methods in a snowball

approach to improve the number of useful contacts. The snowball approach targets respondents within particular demographic groupings, and these are encouraged to contact friends and colleagues who are willing to provide additional information or engage in in-depth discussions (Saunders et al., 2003). Respondents are advised to respond directly to the researcher in order to ensure anonymity. This method is particularly helpful in securing hard to reach populations and when confidential information is sought (Zikmund, 2003). However, an obvious limitation to this approach was the possibility of introducing sample bias, as only individuals who have the confidence to express themselves may come forward. Additionally, organizational members who feel a sense of grievance may see this as an opportunity to express this discontent. This possibility was considered and it was judged that there may be more benefits than risks to the research by adopting this strategy. Willing and self-selected respondents would more likely provide in-depth and honest assessments of their perceptions of organizational culture and identity without any constraints from their peers or superiors. More importantly, this approach provides an opportunity to ensure plurivocal responses are gathered, which is essential for understanding the various perceptions of culture and identity within the organization.

Initial contacts to which emails were sent were selected from a range of functional disciplines, taking into consideration length of stay with the organization, level in the hierarchy, organizational reach and location. These initial contacts were invited to participate in the semi-structured interview and a subsequent follow up discussion. They were encouraged to contact at least an additional 25 staff from among their friends and colleagues with instructions to contact me directly if they wanted to participate. This was felt to be a more effective way of disseminating information about the research and providing a pool of respondents. It provided the following advantages. Firstly, initial contacts were staff that I had maintained contact with over the years and who were aware of my research aims. Their support was guaranteed and commitment to initiating the 'snowball' was assured. Secondly, the snowball approach was more targeted and personal as the contacts only forwarded the mails to colleagues and friends on whom they could exert some pressure to participate.

Complete anonymity was assured as part of the conditions for participating in the semi-structured interviews and follow up discussion. Participants were advised that findings from the research would only be communicated to the organization in general terms without recourse to the specifics of individual responses. In practice, a certain level of trust from the

participants ensured that the research was successful. Respondents to the email correspondence were aware that in contacting me directly, their identities could be compromised as email addresses could be registered. However, in responding, there was an implicit acceptance of the confidentiality assurances provided either directly or through my proxies within the organization.

5.3.4 The Role of the Researcher

The researchers' role in social science research varies from that of an impartial observer, recording data, making observation and drawing conclusions to direct involvement in the research setting to bring about change. Researchers have observed that:

"A strong tradition in scientific writing has been the insistence on the third person and the passive voice. These depersonalise the argument and lend an aura of "objectivity" and "consistency" to the research account. But the interpretive perspective highlights personal involvement with knowledge; it emphasises that knowledge is standpoint dependent" (Smircich and Stubbart, 1985:728).

The interpretive focus of this research necessitated that this researcher adopted a reflexive role within the research setting. Previous experience within the context and relationships were explicitly acknowledged and the possible impact on the research process considered at every stage of the research. Furthermore, the issue of *cultural distance*; where the researcher needs to be aware of the cultural variation between his background and that of the participant, was considered explicitly and not seen to be significant (Moghaddam et al., 2003:115-117). The researcher is a product of the same institutional and social background, as most of the respondents and took into consideration the contextual explanations provided by these respondents in the subsequent analysis. However, to locate this research firmly within the reflexive domain, a detailed examination of the literature on reflexivity was carried out in section 5.2 and highlights how a reflexive mindset was adopted throughout the research process.

5.4. COLLECTING THE DATA

This section deals with the different methods applied in data collection and the reflective choices that guided the research process. Firstly, the different data collection methods are elaborated and their strengths and weaknesses highlighted. Secondly, the notion of research

reflexivity and the search for veracity and verisimilitude is discussed. Finally, some challenges faced during the onsite research exercise are presented.

5.4.1 Methods of Data Collection

Methods of data collection are extremely varied and reflect the preferences of the individual researcher, the nature of the context and most importantly the research problem being addressed. For the purposes of this research the key data collection method was the semi-structured interview, supplemented with observation, archival document research and in-depth discussions. An attempt to provide an interactive media through a dedicated blogging website failed through lack of responses. This may partly be attributed to the organization's policy of discouraging the use of company internet facilities for non-business activities. Data collection was conducted in two phases. The first phase involved preliminary exploratory interviews and archival research to explore and validate the relevant themes within the research setting. This was followed by a second phase of semi-structured interviews, observation and in-depth discussion within the research setting. The different challenges posed by these approaches will be discussed further in this chapter. Table 5.1, detailing the different phases of data collection and timescales involved, is provided below.

Phase One - Exploratory Research	
Preparatory Work	
Date/ Location	Research Activity
Location: Cardiff Period: Four Months (Oct 2004 – Jan 2005)	Initiate contact with target organization. Define themes from the literature. Identify key informants. Preparation and conduction of preliminary interviews. Conduct archival research.
Phase Two – Exploratory and Descriptive Research	
Main Fieldwork (Qualitative data collection)	
Date/ Location	Research Activity
Location : Cardiff Period: Five months (April – August 2005)	Preparation for main data collection activity. <ol style="list-style-type: none"> 1. Prepare interview schedule. 2. Conduct a pre-test of the interview schedule with selected informants. 3. Modify Interview schedule to reflect new themes. 4. Conduct context –relevant archival research to properly understand the context. 5. Confirm access. 6. Create a provisional sampling frame. 7. Try and confirm availability of respondents during the planned field work period.
Location: Nigeria Period: Six weeks (Aug-September, 2005)	Carrying out fieldwork <ol style="list-style-type: none"> 1. Review organizational journals, periodicals and websites to verify key culture and identity themes. 2. Re-confirm availability of respondents and finalise sampling frame/ timetable. 3. Conduct interviews according to timetable.
In-Depth Discussions (Qualitative Data Collection)	
Date/ Location	Activity
Location: Nigeria/ Cardiff Period: 6 months (Aug 2005 – Jan 2006)	<ol style="list-style-type: none"> 1. Identify core set of informants. 2. Extract themes and issues from primary interview 3. Engage in in-depth discussion face-to-face, online and on the phone. 4. Review themes. 5. Present summaries to core respondents for validation.

Table. 5.1 Fieldwork Schedule

5.4.2. Document and Archival Research

Archival data for this research was drawn from a range of sources. These included web-site data, organizational publications and annual reports, newspapers and third party publications. The key benefit of this form of data collection is that it is unobtrusive and may require fewer resources in developing and utilising the data source (Saunders et al., 2000). Previous research has noted that relying on just one form of archival data can be limiting. In an exploratory study into the configuration of organizational images within the Canadian brewing industry, Lamertz et al. (2005) note that “relying on a single data source produces systematic biases that cannot be revealed by the analytic procedure. For example, web-site data are static, and therefore incapable of capturing the temporal qualities of organizational identity attributes” (pg.838). To remedy this limitation, this research draws on a varied range of sources to provide alternative readings which would ultimately enrich the analysis. However, Coupland and Brown (2004), in their examination of Shell Petroleum’s web based identity, justified the unitary data source as a key media whereby Shell’s identity was discussed, debated and defended. Indeed, they note that the media possessed surprisingly dynamic properties, exposing issues of ownership, power and control, access rights and ambiguity around stakeholder positions.

However, archival and document research are not without their limitations. These include the difficulty in gaining required access, especially when the documents are of a confidential nature or the organization is facing reputation challenges and may prevent access to certain documents. In this research, document and archival data was seen to be a useful indicator of how organizational communication of key values and discourses may have changed over time. Archival data in this research served not just as a supplement to other data sources but also provided a tool to engage informants on specific identity issues or claims made by the organization over a period of time (Forster, 1994).

In addition, the rhetorical devices used to market change and other desirable organizational initiatives were more easily apparent in the organizational publications. As a result, access to the divisional library was negotiated to ensure that the full range of existing organizational documentation could be tapped for the purposes of the research. Additionally, third party publications and industry reviews helped place internal organizational events within a context

and provided a much needed perspective to sift between the desired ‘reality’ of organizational elites and the perceived reality of a variety of stakeholders.

5.4.3. Observation

Observation in terms of social science research involves the systematic observation, recording, description, analysis and interpretation of people’s behaviour (Saunders et al., 2000). In keeping with the interactionist orientation of this research, participant observation was the preferred form of observation within the case study organization. This provided better opportunities to locate events within their contexts and understand the meanings which participants attribute to such events. Gill and Johnson (1997) developed a four-fold categorisation of the roles the participant observer may adopt within the research setting which is captured by Saunders et al. (2000) in Fig. 5.1 below. This would aid in illustrating my position during the fieldwork.

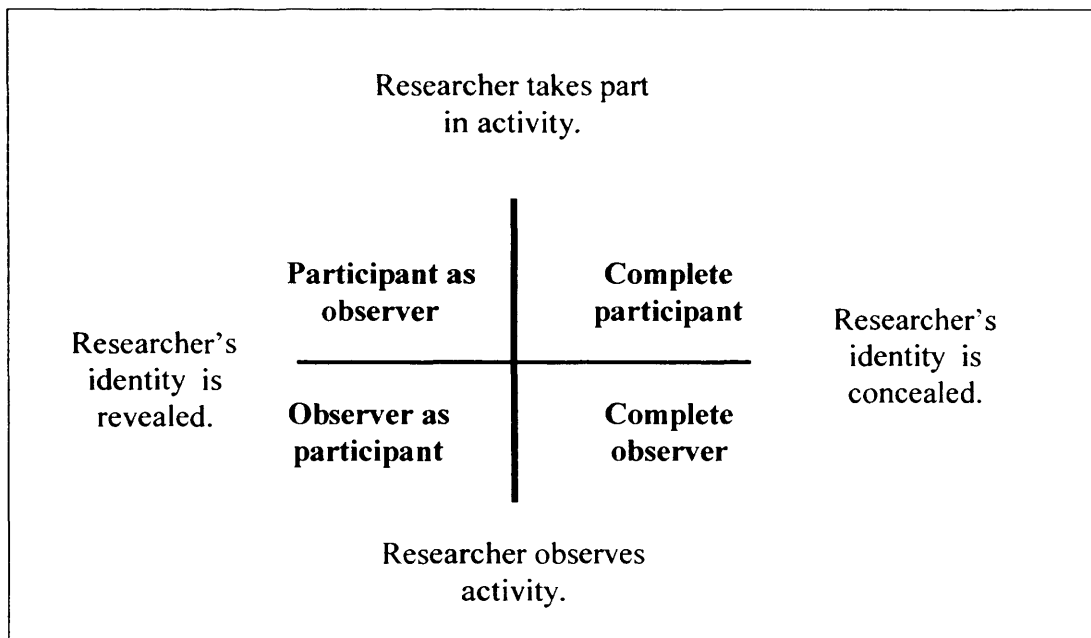


Fig 5.1 Typology of participant observation researcher roles
(Saunders et al., 2000:223)

As indicated earlier, research access was guaranteed as an insider. As such, most observation activity during the research may be represented by the lower left quadrant of the typology in Fig. 5.1. As an observer who occasionally participated in organizational activities, this

sometimes presented certain ethical and access related challenges. The extent to which the researcher provides full and detailed information regarding the research purpose proved a challenge, especially when sensitive topics were under discussion. Furthermore, how data gained from such discussion may be used also has implications for research ethics and may have an impact on how access may be managed within the organization. Additionally, observer bias and observer effect are other possible limitations which may affect the research. Observer bias was minimised within this research by giving the participants a voice in validating the interpretations given to phenomena and organizational activities. Robson (1993) suggests two strategies for overcoming observer effect. These are *minimal interaction* and *habituation*. In minimal interaction, the observer melts into the background and limits interaction with the participants. This was not practical within this research. Rather, a habituated approach was adopted where participants became so used to my presence that they lost their initial inhibitions. To counter the ethical dilemmas, a conscious effort was made to protect the anonymity and sensitivity of any inadvertent research participants by adhering to the university code for ethical research.

Data collection began immediately access was negotiated into the organization. The built space, dress patterns, interactional norms and observances all provided valuable data. A field note was continually updated at the end of each field day and reflected upon to provide insight into organizational practices. These insights were further tested during in-depth interviews to ensure their validity within the context. Robson (1993) suggests that data obtained may well be classed as descriptive observation and narrative account.

I engaged in non-participatory observation of meetings, workshops, organizational routines and other forms of social interaction. As an 'honorary' member of the transformation team, I was also privileged to attend high level strategy sessions aimed at coordinating a companywide HR and employee awareness event. This involved some 'participant' observation as my opinion was sought on a number of occasions and this was freely given. There is no evidence that this affected the outcome of the event in any way. I was equally privy to the weekly team meetings of the transformation team, where each directorate advisor was expected to update the team on the key challenges to adoption of organizational change initiatives within their area of responsibility and what further action needed to be taken.

Data analysis involved poring through the notes and texts in order to tease out initial relevant themes and concepts. This was integrated into the data and text which formed the exploratory phase of the research. A comprehensive data analysis stage was carried out later.

5.4.4. Interview Application

This research adopted in-depth semi-structured interviews arranged around predetermined themes as an appropriate means to achieving the research objectives while providing some focus and direction for research participants. The key themes explored were: organizational values, organizational identity claims, socialisation practices, role definition and autonomy, inter-group relations, human resource practices, communication and learning. The development of these themes was linked both to the theory and to the research context, thereby assuring content and ecological validity. The interview process was recognised as ‘a socially and linguistically complex situation’ (Alvesson, 2003: 14) and a reflexive approach was adopted to minimise the impact of either participant or interviewer bias during the interview and in subsequent analysis.

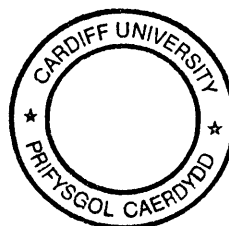
In order to gain interviewee confidence, a proper understanding of the organizational context was required. Prior to engaging in fieldwork, preliminary discussions with key organizational resource persons ensured I was up to date with institutional issues, the ongoing change process and the primary concerns of staff. These issues were included in the research themes and resulted in more open and fruitful research interactions. During the interviews, a conscious attempt was made to note non-verbal behaviours and verbal cues which provided valuable supplementary data. This took many forms and included funny facial expressions, smirks, lowering the tone of voice, banging on the table and long pauses before responding. Repeat and follow up interviews were conducted to establish better interview contact and to ensure that research respondents reflected properly on their previous comments. Additional techniques included sharing emerging interpretations and meanings with respondents, lengthy conversations with key organizational contacts and conducting interviews at various locations (Covaleski et al., 1998: 305). In one instance, a very knowledgeable senior manager with 24 years in Shell, provided insights during four informal chats on specific organizational issues. While in the research setting, every attempt was made to ‘fit’ into the context to ensure high quality access was maintained. Indeed, Robson (1993) urges researchers to adopt a similar

style of dress to those being interviewed. Interviews within the organization were continued until similar responses to the questions began to surface. At this point of “theoretical saturation”, Strauss and Corbin, (1998) suggest that the key themes have been adequately covered within the organizational context and it may be time to discontinue fieldwork.

In total, 68 semi-structured interviews were conducted during the fieldwork period. These interviews varied in length from 32 minutes to 1 hour 42 minutes, with a median interview length of 47 minutes. The majority of the interviews were conducted within company office premises in Port Harcourt and Warri. However, it is noteworthy and possibly significant that above 80 percent of participants who agreed to an interview within the office preferred that this should be conducted during the lunch break when no other staff were available. Five interviews were conducted at the canteen during lunch, three in the staff club and another in a car while driving down the highway. It is suggested that conducting interviews at a neutral location may encourage participants to talk more freely, especially about sensitive issues (Easterby-Smith et al., 1991). Participants were therefore encouraged to choose a convenient time and place for the interview. Indeed, one staff member came in over the weekend to complete his interview which had been interrupted by the end of the lunch break. Staff who preferred to speak outside the office environment made it clear that they did not wish to be overheard. One staff member indicated that he did not wish his comments to be recorded, but did not have any reservations to me taking copious notes during the course of the interview. All interviewees provided informed consent as all were made aware of the purposes of the research. Additionally, anonymity guarantees assured interview participants of their privacy and allowed them to talk freely regarding their perceptions and experience with regards to organizational culture and identity. I also offered them access to the interview transcripts in order to ensure that their views were adequately captured and allow them to make additional comments. This commitment has been honoured in all cases where contact details were available and the feedback has been generally positive.

5.5. DATA MANAGEMENT AND ANALYSIS

In this section, the methods involved in coding data and subsequent analysis will be discussed.



5.5.1. Transcribing and Data Management

The 68 semi-structured interviews, two meetings, a team social function and a workshop constituted the main body of the data for the fieldwork phase of the research. These interviews were mostly taped onto a digital MP3 player, except for one interview where the participant indicated an aversion to taping. In this case, copious notes were taken and my recollections of the interviews committed to tape immediately after the event. The MP3 player was small and unobtrusive and most of the participants tended to forget that the interview was being taped. The tapes were reviewed immediately after the event to ensure the integrity of the tapes and notes taken of key emerging themes. This highlighted one potential problem which was immediately addressed. The MP3 media recorder needed to be placed close to the participant in order to ensure audible interviews could be recorded. An interview database was created and transcription of interviews began while still in the field. However, not much transcription could be undertaken during the actual fieldwork period as the immediate concern was to review emerging concepts and apply them within the research setting for additional insights. Full transcription of all interviews and recordings was completed on my return from the field work. The average interview length was 47 minutes, The longest meeting recorded lasted for 1 hour 28 minutes and 52 seconds and was of a teleconference meeting with a consultant at the Shell centre in the Hague to discuss the plans to run a major transformation event called the People Week in September 2005. In practice, the transcription of each recorded interview took about four times the interview length. Each interview was reviewed several times with inaudible words represented with an xxxx and the location of the missing word on the audio file in brackets e.g. (47.05 min). This enabled subsequent reviews to target the specific elements required to complete the transcription. In total there was 3384 minutes of interview to transcribe and this took about 13,538 minutes, or approximately 225 hrs (32 days equivalent) to complete. In the course of transcribing the cases, it was noted that a case became corrupted and unusable. However, material transcribed during the first review of the case, though incomplete, was incorporated into the interview database to ensure that any insights provided were not completely lost.

5.5.2. Coding the Data

This section outlines and justifies the processes applied in arranging and coding the data derived from fieldwork. It would define what data coding is and briefly discuss the available

options for qualitative research. The section then concludes with the chosen approach and how this was applied during this research.

Data coding includes any procedures or techniques by which a researcher tries to order their data into meaningful categories or themes in order to facilitate analysis. Different forms of coding may be applied in different ways depending on the objectives of the research. These include, but are not limited to, thematic coding and content analysis. For purposes of space restrictions, other forms of coding, e.g. axial coding, will not be discussed

Content analysis involves the manual or automated coding of documents, transcripts, newspapers, or even of audio or video media to obtain counts of words, phrases, or word-phrase clusters for purposes of statistical analysis. Typically the researcher creates a dictionary which clusters words and phrases into conceptual categories for purposes of counting. Various constraints may filter the count, such as the constraint that one concept be or not be within so many words of another concept (Hodson, 1999). Software such as ATLAS.ti and Nvivo exist which provide text analysis and model building support for researchers by the creation of thematic linkages between texts and displaying relationships between bodies of text according to a pre-determined code. Other software such as NUD*IST are content analysis specific and allow researchers to build lexical and conceptual relationships among words, index text files and conduct pattern matching and searching operations. These options were explored and provided some useful guidelines on theory development. However, for the purposes of this research, a more hands on approach was seen as desirable to ensure complete immersion in the data. A thematic coding process similar to the grounded theory strategy was adopted for data analysis and this is described below.

5.5.3. Analysis

Interview analysis followed an iterative, inductive approach similar to the grounded theory strategy (Glaser and Strauss, 1967; Strauss and Corbin, 1998). As such, once interview data was collected and transcribed it was coded and analysed for any initial concepts within the data. The recorded interview transcripts were reviewed to achieve some form of “meaning condensation” (Lee, 1999). In meaning condensation, the researcher aims to extract, abridge or abstract the most important themes from the interview text (Lee, 1999: 89). These concepts

were then coded into initial categories (open coding) and then re-coded into themes and further categories in order to inform additional data collection efforts.

A useful seven step process described by Colaizzi (1978) was utilised to provide some coherence and structure to the analysis (Colaizzi 1978 quoted in Goulding, 2005: 303).

- The first task of the researcher is to read the participants narrative, to acquire a feeling for their ideas in order to understand them fully.
- The next step requires “extracting significant statements” to enable the researcher to identify key words and sentences relating to the phenomena under study.
- The researcher then seeks to formulate meanings for each of these “significant statements”.
- This process is repeated across the range of participants’ narratives and recurrent meaningful themes are clustered. Validation of these themes and interpretation may be attempted with the informants.
- These themes may then be integrated into a rich description of the phenomena under study.
- The next stage is to reduce these themes to an essential structure that offers explanation of the behaviour.
- Finally, the researcher may return to the participants to conduct further interviews or elicit their opinions on the analysis in order to cross check interpretation.

The result of this process was merged with the data on the organizational context in order to provide a fuller picture of the phenomena within the organizational setting.

Thus the analytical process was not linear, but recursive and reflexive in order to adapt to the research requirements and also acknowledge my prior interaction with the organization. The emerging nature of theory formation was the key consideration. However, unlike the classical understanding of the grounded theory strategy, some thematic development had occurred prior to engaging participants within the field. This was seen to be a practical and robust way of ensuring that research was theory-informed without being theory-driven.

The analysis was not conducted in isolation from the literature, but enriched and influenced by theories such as :the social identity theory (Ashforth and Mael, 1989; Haslam, 2004), the

relational view of identity, image and culture (Hatch and Schultz, 1997) and a more narrative and communications based view of identity (Chreim, 2002; Sveningsson and Alvesson, 2003), which have been discussed in previous chapters. The full range of categories and themes will be discussed in more detail in the data sections. However, some of the emerging themes from the literature and initial analysis included awareness of values (how these were understood and shared), the nature and impact of change, the relevance of stakeholders, internal organizational processes supporting identity and culture creation and maintenance (these include HR processes, and communication) and organizational/ individual responses to identity threats.

5.6. RESEARCH ISSUES

In this section some of the key concerns with any social science research are discussed. This includes questions relating to research ethics, the reliability or trustworthiness of the research, and issues around validity. These issues and concerns are discussed and the steps taken to limit their impact on the research are highlighted.

5.6.1. Research Ethics

It is undoubted that one of the key challenges of qualitative research is its intrusive nature and its potential to create disruptions through the very depth of detail it seeks to produce. The ethical positions adopted by researchers vary from one extreme to the other. There are those who argue that the end justifies the means, e.g. its “only a minor defect that persons must be deceived in the process” (Soble, 1978: 40), while others argue that, “The value of the best research is not likely to outweigh injury to a person exposed. Qualitative researchers are guests in the private spaces of the world” (Stake, 2000: 447).

Achieving informed consent can be limiting and may even derail research deemed to be sensitive or political. Indeed, Punch notes that, “in much fieldwork there seems to be no way around the predicament that informed consent – divulging one’s identity and research purpose to all and sundry - will kill many a project stone dead” (1994: 90). The gold standard of ethical research is an attempt to achieve informed consent at all stages of the

research process. ESRC and Cardiff university guidelines on social science research urge that informed consent of all participants be achieved prior to data collection.

In practice, this research adopts an ethical code where each research participant was clearly informed either verbally or by email of the objectives of the research. During the interview process, participants were also advised that they retained the option of rejecting tape recording, despite the fact that the alternative (making interview notes) was much more onerous and tasking. Guarantees of anonymity were provided as standard and participants notified that any request by the organization for research data would only result in aggregated responses which would ensure no individual respondent may be identified.

5.6.2. Establishing Veracity and Verisimilitude

Yin (1994: 32-38) argues that there are four standards or tests that need to be performed to ensure the quality of social scientific research. These are construct validity, internal validity, external validity and reliability. **Internal validity** addresses concerns about causal relationships and the internal logic of explanations, while **external validity** seeks to establish the domain within which a study's findings can be generalised. **Reliability** aims to demonstrate that the operations of a study may be replicated with similar results.

However, the only test directly applicable to this research is **construct validity** which seeks to establish that the correct operational measures are applied for the concepts being measured. In this instance, the development of themes through theory distillation and reflexive interaction with the organizational context assures the internal consistency of the themes used to explore organizational culture and identity. The notion of internal validity, though more consistent with an experimental research focus, may only be applied to qualitative interpretivist research when it seeks to ensure that the data analysis covers all possible logical explanations. This research sought to address multiple views and perspectives and ensure plurivocality was encouraged.

Reliability concerns are best addressed by establishing and maintaining a research case protocol. This protocol acts not just as tool for the field work but to ensure a verifiable trace of key research activities. The notion of external validity seeks some form of generalization.

However, the aim of case study research is not to achieve statistical generalizability, but rather *analytic generalizability* (See Yin, 1994; Lee, 1999).

Analytic generalisation requires that “a reasoned judgement” be made about whether the results of one qualitative study can be legitimately used to guide inferences for another study, after taking into account the specifics of their context (Lee, 1999). In an analysis of what he terms post-modern research, Kvale (1996) argues that the notion of validity is still relevant but may be modified depending on the ontological perception of ‘truth’ or ‘reality’. He posits three forms of validity as relevant: validity as craftsmanship, validity as communication and pragmatic validity. Table 5.2 below provides a summary of some of the key views on validity as it applies to qualitative research approaches.

Researcher	Validity Concerns	Focus	Research Tactics
Yin (1994)	Construct validity Internal validity External validity Reliability	Concepts Causal linkages Generalisation Repeatability	Multiple sources of information Pattern matching: Explanation building Analytic fit Research protocol: Case study database
Kvale (1996)	Validity as craftsmanship Validity as communication Pragmatic validity	Trustworthiness Persuasiveness Coherence	Falsification Establishing linkages Establishing impact
Marshall and Rossman (1995)	Credibility Transferability Replicability Confirmability	Accuracy Generalisation Dependability Objectivity	Detailed records Theoretical rigor Research protocol Reflexivity

Table 5.2. Validity for Qualitative Research Adapted from Lee (1999)

The table above (Table 5.2) shows that within organizational research, the concerns about soundness go beyond the methodological approach taken. Validity and reliability issues affect both qualitative and quantitative researchers, though this might be interpreted differently depending on the research perspective adopted. For the purposes of this research the

integration of these different views on research soundness was applied to ensure that key threats to validity may be eliminated (Maxwell, 1995).

This thesis acknowledges the importance of these methodological concerns and has outlined specific strategies for addressing each of them. Table 5.3 below provides a self-explanatory summary of these strategies.

Traditional criteria	Trustworthiness criteria	Criteria met in this study through:
Internal validity	Credibility	<ul style="list-style-type: none"> ▪ Member checks. ▪ Extended engagement in the field. ▪ Triangulation of data types. ▪ Participant debriefing.
External validity	Transferability	<ul style="list-style-type: none"> ▪ Detailed (thick) description of Organizational context.
Reliability	Dependability	<ul style="list-style-type: none"> ▪ Purposive and theoretical sampling. ▪ Participants' anonymity guaranteed. ▪ Value-free note taking. ▪ A search for theory-negating incidents. ▪ Adequate audit of data collection, management and analysis processes.
Objectivity	Confirmability	<ul style="list-style-type: none"> ▪ Explicit separation of 1st and 2nd order findings. ▪ Comprehensive research protocol. ▪ Verbatim transcription of interviews. ▪ Careful notes of observations. ▪ Clear notes on theoretical and methodological decisions. ▪ Accurate records of contact and Interviews.

Table.5.3. Techniques applied within the research to ensure trustworthiness.

(Adapted from Marshall and Rossman, 1995; Lee, 1999)

Summary

This chapter has sought to discuss and justify the methodological and analytical choices that guide the research. A single case study applying a social constructivist approach was deemed appropriate to answer the research questions and meet the purpose of the research. Primary qualitative data collection was achieved through semi-structured interviews, supported by archival and secondary data collection. The main challenges encountered during the research were addressed in a variety of ways which are highlighted below.

Firstly a reflexive approach to the researchers' presence and its effect on the participants was taken into account. A 'fly on the wall' approach to data collection was not seen to be a realistic option as previous experiences within the organization and established relationships might have affected the data collection in some way. Secondly, previous personal and theoretical biases were not allowed to cloud the data collection process but were utilised as lenses or perspectives to enrich the analysis, and these were made evident in the writing. Thirdly, an attempt was made to utilize a range of data collection strategies to provide a richer source of data. Fourthly, extreme or divergent reports were examined in more detail to gain additional insights. Fifthly, a research protocol detailing the research steps and providing records of data collected was created to aid corroboration. Furthermore, research participants were provided with transcripts of their interviews to ensure their thoughts were properly recorded and any explanations or conclusions drawn in the course of the research were valid.

Finally, different methods for data collection and analysis strategies were evaluated and the preferred choices justified based on theoretical fit (ability to address the research questions) and practicality concerns within the research setting.

This chapter concludes the review of the methodological options and their application during the course of the research. The following chapters will introduce the empirical sections of the thesis, beginning by providing contextual background to the case study organization.

CHAPTER SIX

THE ORGANIZATIONAL CONTEXT

6.1. INTRODUCTION

Johns (2006) argues that though context is sometimes addressed in management research, its importance and significance is not clearly highlighted. He observes that, “such contextual features are often studied in a piecemeal fashion, in isolation from each other. When aspects of context such as job design are the focus of the study, other salient contextual features such as the rewards system are often unmeasured and unmentioned” (pg. 389).

This contextualisation is particularly important with respect to research on multinational corporations. Multinational corporations operate in multiple countries and environments which expose them to a bewildering variety of cultural, institutional and economic forces. In order to manage these forces, internal co-ordinating structures sometimes produce inherent contradictions which may only be teased out by a detailed awareness of context.

In practical terms, an awareness of context was directly relevant at the fieldwork phase of this research, by ensuring that proper access was negotiated within the organization, the key issues were identified, the right questions were asked and bias avoided. This was particularly important to ensure there was an ongoing reflexivity to remain attuned to the perceptions and realities of organizational participants. The contextual detail obtained was subsequently valuable in allowing a variety of explanations to be proposed during analysis. To further emphasise this point, Johns (2006: 390) laments that the parsimony exhibited in descriptions of context by organizational researchers deprives the audience of opportunities to cogitate about the potential contextual influences.

In view of the above discussion, this chapter will explicitly recognise the importance of context by providing a breakdown of relevant context-related factors from the macro external environment to the micro and internal organizational aspects. Firstly, the historical evolution of the Nigerian nation state will be highlighted. This will provide the appropriate social and political context, locating the Shell Petroleum Development Company as an emerging and

dominant business entity within the Nigerian economic environment through the growing importance of oil as a key natural resource. Secondly, this discussion will explore more recent contextual challenges, such as the impact of competitive rivalry, increased militancy of host communities and changes in the regulatory context on Shell's business environment but will also highlight the endemic problem of corruption, commonly referred to as the Nigerian factor, and the impact this concept has on organizational functioning within the wider Nigerian context. Finally, this section will provide some discussion and data regarding the internal organizational context and the ongoing changes by Shell to address these challenges. Data for this chapter is derived primarily from published secondary data, information from company websites and annual reports, onsite observation and notes made during interviews and discussions with organizational informants.

6.2. COUNTRY BACKGROUND

The Federal Republic of Nigeria was the location in which this research took place. This section seeks to provide some detail of the institutional, economical, social and cultural contexts within which Shell conducted its business and under which its employees engaged in social interaction. It has been consistently observed that organizations and their practices are sometimes influenced by or mimic the prevailing practices of the wider community, leading to forms of institutional isomorphism (DiMaggio and Powell, 1983; Amaeshi, et al., 2006). Where this is not the case, for example, where multinational organizations import practices or guidelines from their headquarters, these practices or the understandings attributed to them may be tempered by national or cultural values and prejudices.

This section begins by providing a short historical background of the Republic of Nigeria which is widely available in the literature and the media. This discussion is brought up to date by detailing the institutional and political changes which immediately preceded the data collection phase and which had the potential to affect internal organizational processes. Following on from this discussion I then begin to locate Shell in a specific context by describing Shell's history and operation within Nigeria; highlighting its size and scope, location, business structure and common organizational processes.

6.2.1. Nigeria – History

The nation state called Nigeria covers an area of 923.8 thousand square kilometres (356,700 square miles). Its current capital is Abuja, which has a recorded population of 778,567 citizens. The capital was re-located in 1991 from the long time capital Lagos (population estimated at 7.9 million residents). However, Lagos remains the primary economic capital of Nigeria. Nigeria is the most populous country in Africa and the eighth most populous in the world with a population of over 155 million citizens (Source CIA –The World Factbook: June, 2011 estimates).

There is great diversity in both the terrain and peoples of Nigeria. The terrain ranges from grasslands and semi-desert in the far north to southern coastal swamps and tropical forests. The highest region is the Jos Plateau, which is 1,200-2,400 meters above sea level. Nigeria has a southern coastline with the Atlantic Ocean and a northern border with the Sahara desert. The Niger Delta is one of the world's largest wetlands, and the largest in Africa; it encompasses over 20,000 square kilometres. Nigeria also possesses the third largest mangrove region in the world and the largest in Africa; over 60 per cent of this mangrove (6,000 square kilometres) is found in the Niger Delta (Human Rights Watch, 1999). The people of Nigeria are equally diverse with about 250 known ethnic groupings of which the largest are the Hausa, Fulani, Igbo, Yoruba and the Kanuri. The key religions are Islam, Christianity and indigenous African religion. Although English is the official language, Hausa, Igbo, Yoruba, Fulani and Kanuri among others are spoken widely (CIA – The World Factbook). The most common mode of communication is through a patois termed 'pidgin English', which is English blended with the local vernacular.

The diversity of Nigeria is understandable when one considers its origins. Nigeria, a previous colony of Britain, came about through the amalgamation of the northern and southern protectorates in 1914 by Lord Lugard. Prior to this amalgamation there was very little contact between the tribes and ethnic groupings. Nigeria finally achieved independence in 1960. The emergence of the Nigerian republic has been characterised as a colonial experiment which struggles to find cohesion and a clear identity. This implicit discord has frequently resulted in conflagrations and conflicts, the most prominent of which was the 30 months Biafra war which occurred between 1969 and 1971. More recently, Nigeria's economic stability has

been threatened by militants in the Niger Delta agitating for regional control of oil resources and compensation for perceived contamination of lands and seaways through oil extraction and production activities. Although government mediation has tempered the militancy somewhat, sporadic violence in the Niger Delta contributes to a persistent sense of insecurity.

6.2.2. Nigeria - Government and Politics

As a Federal Republic, Nigeria is modelled after the United States of America, with executive power exercised by a president elected by popular vote to serve a four year term. Each elected president is only allowed to serve a maximum of two consecutive four year terms. The president is both the chief of state and head of government. He/she is also the commander-in-chief of the armed forces. This political model also has overtones of the Westminster system in terms of the composition and management of the upper and lower houses of the legislature. Presidential power is constitutionally checked by a legislative arm which comprises an elected senate and a federal house of representatives, which are combined in a bicameral body called the National Assembly. The Judiciary supports these two arms of government by providing an interpretation of the law and the constitution. At a regional level there are 36 states governed by state governors and their legislative and judiciary arms and 1 territory (The Federal Capital Territory Abuja) overseen by a federal capital territory minister.

Following independence in 1960, Nigeria has struggled to maintain some political stability with sixteen of the intervening years under military rule. A new constitution was adopted in 1999, and a peaceful transition to a civilian government was successfully completed. Despite continuing ethnic and religious tensions, Nigeria is currently experiencing its longest period of civilian rule since independence. The general elections of April 2007 marked the first civilian-to-civilian transfer of power in the country's history. The legal system is mostly based on English common law, with Islamic law (in 12 northern states), and traditional law adopted by some states and individuals for various social purposes (Source: The Nigeria High Commission London Website @ <http://www.nhcuk.org/government-politics>: June, 2011). The emergence of a democratic government in Nigeria has resulted in increased demands for accountability, transparency and access to operational details of the oil companies. Shell's management in particular, have been called up several times before the senate to make

presentations on its activities in the disputed Ogoni oil fields and to indicate what progress has been achieved in implementing the Nigerianisation agenda. Furthermore, the senate and judiciary have raised questions about the continuation of gas flaring by Shell, despite several government deadlines aimed at ending flares in the Niger delta. Hence, Shell has been very much on the defensive in justifying its operations within Nigeria. It should be noted, though, that Shell is not the only oil company flaring gas in the Niger delta. However, the scale of its operations and its prominence within the sector makes it an obvious target for the government and other stakeholders.

6.2.3. Nigeria – Economy

Nigeria has a dual economy with a traditional agricultural and trading economy, overtaken by a modern segment dependent on oil and hydrocarbon earnings. At independence in 1960, agriculture accounted for above half of GDP and was the main source of export earnings and revenue. Nigeria now imports food as the largely subsistence agricultural sector fails to provide for the growing population. More recently, with the discovery of oil and the emergence of the oil sector in the late 1960's and early 1970's, Nigeria has become over-dependent on this natural resource. At present, oil and related hydrocarbons provide 20% of GDP, 95% of foreign exchange earnings, and about 80% of budgetary revenues (Source CIA-The World Factbook). According to the Oil and Gas Journal (OGJ), Nigeria has an estimated 37.5 billion barrels of proven oil reserves and 5.246 trillion cubic metres (m³) of proven gas reserves as of February 2011 (Source: <http://www.businessweek.com/news/2011-02-22/nigeria-says-proposed-law-will-boost-crude-oil-reserves.html>). Nigeria is the sixth largest producer of oil in the Organization of Petroleum Exporting Countries (OPEC), and also has sizeable gas and industrial mineral reserves.

Nigeria continues to have a sizeable debt problem coupled with corruption, which has led to poor infrastructure development, unemployment, waste of resources and crime. In 2005, Nigeria's external debt burden was calculated to be \$37 billion (USD). As part of a raft of measures to boost the economy, the government agreed to carry out market reforms and deregulate the economy. The dual exchange rate mechanism was abolished, fuel prices were deregulated, the main refineries were billed for privatisation (still not completed as at April 2011) and a national economic empowerment development strategy was instituted for fiscal

and monetary management. Of greater importance to the oil industry was the need to resolve regional militant disputes over the distribution of earnings from the oil industry and ensure that the government contributed its fair share to the operational cost of oil exploration and production.

The measures described above were sufficient to facilitate a debt renegotiation with the Paris club. This led to a significant debt write-off, and in 2006 Nigeria made history as the first African country to completely pay off its debt owed to the Paris club. Since then it is recorded that GDP has grown progressively, which seemed to indicate that economic reforms and market restructuring programmes were beginning to have an impact. According to the Economic Intelligence Unit and the World Bank, Nigeria's GDP at purchasing power parity (PPP) had nearly doubled from \$170.7 billion in 2005 to \$292.6 billion in 2007. The GDP per head had jumped from \$692 per person to \$1,754 per person in 2007 (Source - Economic Intelligence Unit). According to other analysts, GDP (PPP) for 2007 was £318.billion (est.) and for 2010 GDP (PPP) stood at \$377.9 billion (est.). GDP per capita was estimated to be £2,500 for 2010 (Source: CIA – The World Factbook).

6.2.4. Recent Changes and Developments

The Nigerian telecommunications market is claimed to be one of the fastest growing in the world, with major emerging market operators (e.g. MTN, Globacom and Etisalat) locating their largest and most profitable centres in the country. The government has also moved to expand the telecoms infrastructure to include space based communication with a space satellite monitored at the Nigerian National Space Research and Development Agency in Abuja. In addition, the existence of a well developed financial services sector, with a mix of local and international banks, brokerage houses, asset management companies and insurance companies are beginning to provide a useful counterfoil for the dominance of the oil sector within the Nigerian economy (Eweje, 2007). Thus, the best and brightest graduates do not now automatically gravitate to the oil sector as the only source of stable employment and remuneration. This increased competition in the marketplace also provides an option for employees within the oil sector and Shell in particular to explore alternative employment opportunities.

Within the context of regional politics, Nigeria has always been a significant actor due to its size, location and resources. It is an active and dominant member of both the African Union and the Economic Community of West African States, and has spearheaded such initiatives as the conflict resolution in Liberia and the Ivory coast. In January 2010, Nigeria assumed a non permanent seat on the UN security council for the 2010-2011 term.

6.3. HISTORY OF SHELL PETROLEUM DEVELOPMENT COMPANY NIGERIA.

The Royal Dutch Shell group of companies took its current name and form in 1907 after the merger of the then Royal Dutch Petroleum Company with the “Shell” Transport and Trading Company Ltd of the United Kingdom. This merger was prompted by the need to remain competitive with the then dominant American oil company, Standard Oil. Under the terms of the merger, 60% of the new group was Dutch-owned and the other 40% British-owned. The organization traditionally operated a dual structure board until 2005, when stakeholder protests regarding accountability and transparency concerns resulted in the establishment of a more traditional board accountable to a single board of directors. At the top of this management structure is the Chairman of the Committee of Managing Directors. He/ she is responsible, together with various regional directors and directors of particular global products, for setting the overall vision and strategy for the organization (Source: Shell corporate website - www.Shell.com/- 2011).

In Nigeria, Shell began operations in 1938 when it was granted a licence to explore for oil throughout the Nigerian protectorate. At the time the company was named Shell D’Arcy. The first commercially viable oil was discovered at Oloibiri, and a successful well was drilled and completed in 1956. Shell changed its name from Shell D’Arcy to Shell-BP Petroleum Development Company of Nigeria Limited in the same year. In 1956, the first shipment of oil from Nigeria occurred (Shell Nigeria website - www.Shell.com/nigeria/).

The Royal Dutch Shell Company currently operates in Nigeria under the umbrella of Shell Companies in Nigeria (SCIN). SCIN comprises four ‘independent’ companies, namely: Shell Petroleum Development Company (SPDC), Shell Nigeria Exploration and Production Company (SNEPCo), Shell Nigeria Gas (SNG) and Shell Nigeria Oil Products (SNOP).

SCIN is responsible for delivering over 10% of Royal Dutch Shell's annual revenue (Ojeifo, 2009).

Shell Nigeria is the more common colloquial term for Shell Petroleum Development Company (SPDC), which is the focus of this study. The names Shell Nigeria and SPDC will be used interchangeably for the rest of this thesis. It is the largest private sector oil and gas company in Nigeria. The company is the operator of a joint venture in which the government, through the Nigeria National Petroleum Corporation (NNPC), holds a controlling share of 55%, Shell 30%, Elf Petroleum Nigeria Limited (a subsidiary of Total) 10% and Agip Oil company 5%. This joint venture previously accounted for more than 40% of Nigeria's total oil production (capable of producing on average a million barrels of oil per day). In 2007, oil production averaged at just over 700,000 boe/d (barrels of oil equivalent per day) and in 2008 production from Shell-run operations averaged 850,000 boe/d (Source: Shell Nigeria website). In 2008, Nigerian crude oil production averaged 1.94 million barrels/day. If current shut-in oil production capacity were back online, it is estimated that Nigeria's oil production could reach 2.7 million barrels/day. The decline in oil production has been blamed on disruption and sabotage within the Niger Delta (Source: Energy Information Administration - www.eia.doe.gov). Although the government has opened up discussions with the militants, the low level violence and tension within the Niger Delta continues to impact on Shell employees such that they are unwilling to identify themselves as oil industry workers.

Shell Nigeria operates mostly on-shore facilities. These are largely on land or in the mangrove swamps of the Niger Delta. As a result, their installations are in close proximity to local communities and any environmental impact is directly felt by these communities. A notable exception is the Bonga oil platform, which exploits deepwater oil reserves 120 kilometres off the Nigerian coast. Shell's activities in the Niger Delta are spread over roughly 30,000 square kilometres, and this includes a network of pipelines and flow lines totalling 6,000 kilometres, 90 oil fields, 1,000 producing oil wells, 72 flow stations, 10 gas plants and 2 major oil export terminals at Bonny and Forcados. Shell Nigeria employs about 5,500 staff directly, 95% of whom Shell Nigeria claim are indigenous. A further 20,000 people are employed by contractors working for Shell (Source: Shell Nigeria website - www.Shell.com/nigeria/- 2010).

mining leases or oil blocks. The department has the authority to impose fines or close down non-compliant operations (DPR website). Additionally, as I found out during the course of fieldwork, the DPR also authorises any research within the oil industry and refers the successful applicant to the relevant oil company.

The Federal Ministry of Environment (FMEnv) is responsible for ensuring the formulation of and compliance monitoring of environmental standards. A vital function played by the FMEnv relates to the approval of Environmental Impact Assessment (EIA) permits. New oil and gas projects require EIA approved permits from the ministry before any construction or exploration can commence. As part of its approval process it incorporates a public hearing which provides a forum for a range of stakeholders to voice concerns or raise objections. This is particularly important in the Niger Delta region where Shell operates, as it allows the host community to halt projects which may have a long term negative impact on their well-being. In reality, this facility to challenge new projects is hardly highlighted to local communities, and thus they are unable to influence the process in any way. The ministry has also served as the project champion for the elimination of gas flares in Nigeria by 2011, and ensuring the country's adherence to the Kyoto Protocol. This is clearly a project which has wide-scale implications for Shell activities and operations.

However, this has become just another missed deadline in Nigeria's gas flaring history. Shell maintains on its website that it has reduced the amount of gas flared by more than 30% between 2002-2008, and initiated key projects for associated gas gathering at their oil facilities. Indeed, Shell argues that at the moment about 60% of power generation in Nigeria is fuelled by natural gas from Shell-run operations. In addition, Shell highlights its involvement in the successful Nigeria Liquefied Natural Gas (NLNG) project, a joint venture between Shell and the Nigerian government which supplies LNG to world markets (Source: Shell Nigeria website). Nonetheless, the flaring continued past the deadline agreed as the 31st December 2008. Failure has been attributed to a variety of reasons. Shell management indicate that the lack of consistent funding by the main JV partner (the NNPC) and the persistent security situation in the Niger Delta prevent sustained project development. The Nigerian government, through its regulatory bodies, have countered this claim by suggesting that it is expected that multinational companies need to maintain the highest standards in their operations. Needless to say, there has been a further extension of the deadline to December 31, 2011 (Ojeifo, S., 2009).

6.3.1. External Organizational Environment

The external organizational environment provides the context within which organizational meaning systems are embedded and values understood. Many elements may contribute to this environment and include the ethnic and religious diversity of the population, the institutional and social framework within which the organization conducts its operations and the nature of its key stakeholders and competitors. Due to space limitation and the primary focus of this study, this section will briefly review the role of government agencies in regulating activity, the local communities as stakeholders, the growing importance of competing oil producing companies and the prevalence of the Nigerian factor in structuring social interactions.

6.3.1.1. Government Oversight and Controls

The Nigerian government manages or regulates the activities of Shell through three agencies: the Nigerian National Petroleum Corporation (NNPC), the Department for Petroleum Resources (DPR) and the Federal Ministry of Environment (FMEnv).

By law the NNPC manages the oil exploration and production joint ventures between the Nigerian government and the various multinational companies such as Shell. As the major joint venture partner providing the majority of funding, the NNPC is normally consulted before any changes in operations or any major financial undertaking. It utilises its upstream arm NAPIMS (National Petroleum Investment Management Services) as an instrument to monitor government investments in any joint venture (JV) and protect the country's strategic interests within the JVs. It is also charged with maintaining a reserve base and ensuring reserve addition targets are achieved. These reserve targets were 30 billion barrels by 2002 and 40 billion barrels by 2010. Based on current reserve estimates these targets were being achieved. Where it is not consulted it may levy financial penalties in the form of withdrawn funding (NNPC website - 2010).

The DPR is the key regulator of the oil and gas industry in Nigeria. Its primary roles include overseeing the lifting and export of oil, gas and condensates. This function also covers the distribution of finished petroleum products from depots to service stations. Additionally, the DPR is responsible for the issue and renewal of oil exploration permits and licences, inspection of operational sites and conducting of licensing rounds leading to allocation of oil

With the establishment of democratic principles in Nigeria and the growth of accountability, these government agencies have become more focused on cost maximisation and *Nigerianisation*. Nigerianisation within this context refers to a gradual process of managed skills transfer within the oil sector to limit dependence on expensive expatriate staff and resources. This concept has emerged as a key theme in response to the various human resource reduction initiatives within the oil sector over the past 10 years. The unions and government have questioned the need to retain expatriate staff for such mundane tasks as document management when such activities may be easily allocated to local staff at less cost. It seems that with increased stakeholder pressure, Shell Nigeria has acknowledged that Nigerianisation is a major staff and stakeholder issue. Possibly as a result of this, it prominently highlights the fact that its affiliate, Shell Nigeria Gas (SNG), is composed solely of Nigerian staff and thereby uses only local staff for its public relation images (See Shell Nigeria Website). The impact the political context has had on stakeholder interactions will be discussed in more detail in the analysis and discussion chapters.

6.3.1.2. Local Communities

Shell's relationship with its key stakeholders and hosts within the local communities has been mostly fractious and antagonistic. This has emerged from a perceived history of neglect and deprivation (See BBC Newsnight, February 2009). Shell's long term history within the Niger Delta has placed it at the forefront of oil exploration and production with lasting negative effects. In the absence of democratically elected governments and clearly established oversight protocols and environmental safeguards, Shell's operations led to widespread pollution and resource degradation within the region. This degradation has had a lasting impact on the agriculture and fishery based economies of the region. As the wider economy deteriorated, Shell's activities were called into question by environmental activists seeking adherence to proper global industry standards and compensation for loss of revenue and lifestyle (Eweje, 2007). Most notable of these activists was the writer and poet Ken Saro Wiwa, who sought changes in Shell's relationship with the Ogoni tribes of the Niger delta by forming the Movement for the Emancipation of the Ogoni People (MOSOP). The peaceful protests advocated by Ken Saro Wiwa failed to contain the seething anger within the region and he was executed by the Nigerian government in 1995 together with eight co-activists for

inciting murder. Shell has been held morally responsible for the killings, both by the local communities and human rights groups worldwide (See: Greenpeace archive).

Recently (June, 2009), Shell agreed an out of court settlement of \$15.5 million (US dollars) with the families of the killed activists to end a lawsuit alleging complicity in their execution. Shell claims this was a goodwill gesture to mend bridges with their local stakeholders, while other critical commentators perceive this as an acknowledgement of corporate complicity (See: Associated Press 2009 and Pilkington, 2009).

Subsequent to Ken Saro Wiwa's execution, various movements emerged seeking greater oil resource control. These include the Ijaw National Congress, MEND (Movement for the Emancipation of the Niger Delta), and the Niger Delta Peoples' Volunteer Force (NDPVF). The increasing militancy of these groups has led to widespread sabotage, kidnapping and destruction of oil facilities (Okonta, 2007). Shell's operations have shrunk by 20-30% and its production capacity goes through sharp peaks and troughs reflecting the security situation in the Niger Delta (Shell Nigeria website). This context has provided an opportunity for Shell's competitors (such as Mobil and ChevronTexaco) located in relatively safe deep off-shore locations to seek to play 'catch up' and increase their production to compensate for the shortfalls in oil production by Shell. However, a recent BBC Newsnight programme highlights the fragility of these notions of safety. The programme documents an attack by Niger Delta militants on Shell's Bonga platform located 120km offshore. The perpetrators claim that their motive was to send a signal to all oil producing companies in the Delta that escaping offshore was not a viable option and that proper resource allocation within the region needs to be addressed (See BBC Newsnight, 8th January 2009).

6.3.1.3. Competitors

Shell remains the largest oil and gas company in terms of acreage, mining leases held, production capacity and the proven reserve base (See earlier figures). It is closely followed by Exxon Mobil, with a production capability of over 500,000 bpd (barrels per day), ChevronTexaco 485,000 bpd, Agip 150,000 bpd and Totalfina Elf 150,000 bpd (Source: Energy Information Administration). However, the gap between Shell and the rest of the

competition has narrowed considerably. A number of reasons may be suggested for this decline in dominance. However, the primary reason seems to be location. As indicated above, the location of most of Shell's oil facilities on land or within the swamp regions of the Niger Delta had led to their becoming a target for both negative publicity and criminal activity in the form of sabotage.

As of April 2007, an estimated 587,000 bbl/d of crude production was shut-in. The majority of shut-in production was located onshore in the Niger Delta, with the exception of the offshore 115,000 bbl/d EA Platform. Since December 2005, Nigeria has lost an estimated 16 billion dollars in export revenues due to shut-in oil production. Shell has incurred the majority of shut-in oil production (477,000 bbl/d), followed by Chevron (70,000 bbl/d) and Agip (40,000 bbl/d) (Source: Energy Information Administration, 2007).

The resulting decline in production has had an impact on daily oil production targets. The Nigerian government has basically re-allocated Shell's lost capacity to other oil producing companies, most notably Exxon Mobil (trading in Nigeria as Mobile Producing Nigeria Unlimited) and ChevronTexaco.

Additionally, with the merger of Exxon with Mobil and Chevron with Texaco, these merged entities, with their combined oil blocks located in deep water, are positioned to compete in terms of production capacity. This is primarily because such facilities are less prone to disruption and attacks by local militants.

Other players interested in developing what are traditionally called marginal fields have emerged in the industry. Marginal fields are oil or gas fields where the estimated reserves are not extensive and the unit operating cost (UOP) for producing a barrel of oil from these difficult wells was significantly above the industry average. At the time of fieldwork for this thesis, some of these fields were not considered crucial to maintaining Shell's position as market leader and were largely undeveloped and neglected. A review by the Ministry for Environment had identified such Shell marginal fields and placed them on open bid through a tender process. The outcome has been more competitors entering the market place and a further depletion of Shell's proven oil reserves. Another important and pervasive factor which influences and impacts on the ability to do business in Nigeria is popularly described as the 'Nigerian factor' and this will be discussed further below.

6.3.1.4. *The Nigerian Factor*

For some time now, since the early 1990's, global awareness of Nigeria has been dominated not by its oil rich sector but by what has been termed Nigeria's second export, the 419 or advanced fee fraud. This form of fraud has established a perception of Nigeria as a country so riven by corruption that foreign embassies routinely issue warnings for all visitors to Nigeria or the African sub-continent. For the purposes of this research it was considered necessary to address this issue head on and acknowledge its impact on the context of the research.

Corruption is so widespread in Nigeria that its citizens simply refer to it as the 'Nigerian factor'. When talking about corruption, Nigerians refer not only to the abuse of state offices for private gain, but also to a wide range of social behaviours in which morally questionable practices enable the achievement of power, status or wealth. It has been observed that the popular notion of corruption in Nigeria encompasses everything from government bribery and graft, rigging of elections and fraudulent business practices, to cheating in schools and medical quackery (Smith, 2007). Willing or unwilling participants in corruption at every turn, Nigerians are deeply ambivalent about it – resigning themselves to it, justifying it, or complaining about it.

In his book *The Trouble with Nigeria*, the famous Nigerian author Chinua Achebe (1983: 2) commented on Nigerians' proclivity for complaining, "whenever two Nigerians meet, their conversation will sooner or later slide into a litany of our national deficiencies". Chinua Achebe decries this national pastime as a sign of resignation to the perceived limitations and inadequacies of Nigerian social and political life. In an excellent analysis of the dynamics of corruption within the African sub-continent, Jean-Pierre Olivier de Sardan comments on the extent of discontent about corruption, "At the everyday level, there is scarcely a conversation without hostile or disgusted references to corruption (1999: 29)". It is suggested that in many ways corruption has become the dominant discourse of post-colonial Africa, symbolising people's disenchantment with the democratic process, poorly planned and implemented development initiatives and a continued sense of frustration with social inequality. These complaints about corruption sometimes act as triggers to complex socio-cultural responses that are both complicit in and challenging to the established status quo.

It is therefore essential to address the issue of corruption head on, recognise its influence on the social consciousness of respondents and acknowledge explicitly what relevance it may have for a proper analysis of the data. It is equally important to highlight that as a Nigerian studying social and work dynamics in the context of Nigeria, my own understanding of corruption and critique of its pervasiveness in both cultural and social meaning making structures may have some influence on what is presented. The form of analysis which is considered appropriate, and meaning attributed to statements within specific contexts, may thus be coloured by a specific cultural understanding. As an anthropologist recently pointed out, “Recognizing the seriousness of Nigerians’ discontents, including ambivalence regarding their own roles, and examining the range of social and cultural phenomena that are produced in response to corruption, are essential to explaining the multiple meanings implied when Nigerians attribute their predicament to the Nigerian factor”(Smith, 2007:9).

6.3.2. Internal Organizational Context

6.3.2.1. Organizational Structure and Location

Shell’s structure has changed considerably over the years, reflecting the various change and transformation events that have occurred. Employees were confused as to the order of evolution, but the following information was finally obtained from organizational informants and archival documents. From the late 1980s to the early 1990s, Shell operated a divisional structure with two operational divisions and a corporate headquarters in Lagos. The Eastern Division with headquarters in Port Harcourt was a mirror image of the Western Division headquartered in Warri in terms of departmental structures, roles and activities. Each of the divisions was run by a divisional manager who reported to the Board of Directors located in Lagos. The two divisions maintained control over all operations and production activities within a pre-defined geographical zone. The transformation of 1995 -1998 brought about a business model based on functional areas headed by managers and business areas overseen by directors. The importance of a divisional manager role was in decline, with some functional teams spanning both operational locations. The harmonisation of roles and responsibilities across the regions began with the human resources division. Recruitment, perceived as a key and strategic activity across the organization, was designated a corporate function with a corporate team in Port Harcourt providing and supporting recruitment

expertise across the organization. Gradually this corporate trend spread to IT and services departments which were considered crucial but were not core activities of the organization. By 2004 the organization made the decision to move its corporate headquarters to Port Harcourt and most functions became fully corporate apart from core production teams.

The decision to relocate to Port Harcourt was based not just on business needs but on the increasing insecurity in Warri, where robberies and raids on oil facilities were becoming increasingly prevalent (See Igbikiowubo, 2003 and Human Rights Watch, Nigeria: The Warri Crisis: Fueling Violence, 17 December 2003). Shell management assumed that relocation to Port Harcourt, a large metropolitan city with many multinational companies, would enable Shell to merge in and become anonymous, thereby providing a secure operational headquarters (Source: Shell Employee, 2005). This has not been the case, with stakeholder militancy following Shell across the Niger Delta region.

6.3.2.2. *Staff Development*

Shell reports and the corporate Shell website claim that the company places a high premium on staff development. A robust learning strategy was found to be in place for functional groupings and business areas. A dedicated learning advisor provided advice to these functional disciplines from the Edjeba Learning and Development Centre located in Warri, Nigeria. This center maintained very close links with the Shell Corporate learning center in the Hague which provided overall learning coordination and control across the Shell group (Source: Shell learning advisor, 2005). To complement direct learning interventions, Shell employs the use of lateral transfers and overseas assignments where necessary to ensure that skills levels are maintained. However, the application of these processes was not considered uniform across different functional areas and disciplines.

Staffs' wider perceptions of the contribution of learning and development options in communicating organizational values and entrenching an elite culture and identity will be discussed in more detail in later chapters.

6.3.2.3. *Communication*

Person to person communication within the organization was either by phone or email. Despite projecting a desire to achieve a paperless office, emails were regularly printed to provide backups which were then filed away. One reason suggested for this practice was that older staff tended to have a distrust of emails and feared they might lose valuable information if the server ever goes down. Another was an attempt to store information for self-protection. This was a reflection on another aspect of Shell culture, where employees suggested that blame for failed projects and processes was rife. Hence the need to store evidence in case of future enquiries.

The organization's communication with its employees was perceived to be rather traditional. There was a perception that externally directed communication was managed differently from internal communication, which was mostly via cascade sessions, road shows, newsletters, and Shell intranet publications. More recently, the installation of reliable global integrated networks and teleconferencing facilities enabled employees to communicate with their colleagues internationally in order to share knowledge and expertise.

In addition, these integrated technological advances provided opportunities for employees to exercise their 'voice'. This included an online Tell Shell forum which prior to changes in 2004 allowed employees to post anonymously on any issues relating to organizational activities or processes. A typical post could represent opinions about Shell's interaction with community stakeholders, the extent and quality of employee engagement during town hall sessions or the provision of services during organizational learning events. The way this forum operated was modified following a review which recommended that employees should log on and identify themselves prior to providing constructive criticism of issues or processes. However, employees suggest that the site has ceased being of value as a means to inform management of issues that are important to staff but which are too sensitive to address directly.

6.3.2.4. *Organizational Competitive Context and Responses*

The Shell reports and website suggests that as a response to the competitive context, the organization has explored and invested in opportunities to develop offshore oil and gas production capacity. This recently yielded results through the Bonga deepwater oil and gas project. Speaking at the start of production in 2005, Malcolm Brinded, then executive director of Shell exploration and production said, “Bonga begins a new chapter in Nigeria’s oil and gas production, and an important contribution to new material oil production for Shell. The project targets an increase of around ten percent in Nigeria’s oil production and about a twenty five per cent increase in Shell operated production in the country. Nigeria’s deepwater is a frontier growth opportunity for Shell and we have recent discoveries offshore and a strong acreage position. Bonga is a highly valuable asset for Nigeria and for Shell, and the field is coming on-stream to meet demand at a time when energy prices are high” (Shell Nigeria website - 2005).

This statement reflects Shell’s concern with renewing its pole position after recent events in the Niger Delta affected its dominance of oil production in Nigeria. These events include reduction of oil production in the oil delta of Nigeria as a result of flow station shutdowns due to sabotage and increasing insecurity to staff and facilities. In addition, Shell has generally lacked an aggressive policy for the acquisition and development of oil mining leases (OMLs). This has led the Nigerian government to retrieve these mature leases and re-allocate them to Shell’s competitors through open bidding processes.

To counter these challenges to its core business, Shell has begun to diversify into gas liquefaction and transport. A Shell subsidiary (Shell Nigeria Gas) was incorporated in 1998 to promote gas utilisation as a cheaper, more reliable and cleaner fuel alternative for industries within the West African sub-region. Shell also acquired a 25.6% shareholding and became the technical leader in Nigeria Liquefied Natural Gas Limited (NLNG). Together with its joint venture partners – government owned Nigeria National Petroleum Corporation (NNPC), with a share of 49%, Elf (15%) and Agip Oil Company (10.4); Shell built a \$3.8 billion plant which began operating in 1999, supplying liquefied gas to markets in Europe and the US (Shell Nigeria website). The company claimed that together with other associated gas gathering projects under development, they are on target to eliminate gas flaring in 2008 as

required by Nigerian government regulations and the Kyoto Protocol. As indicated earlier, this aspiration has not been met and the date for complete gas flare-down has been extended to 2011.

Summary

In conclusion, the multinational context highlighted in this chapter focuses on some key differences which differentiate these organizations from indigenous companies. This includes a centrally co-ordinated group learning strategy adopted and applied across the Shell Group to maintain consistency within skills groups and specialties. Additionally, access to and involvement in dynamic knowledge sharing networks across different subsidiaries allows staff to share best practice. As mentioned earlier, the use of technology in the form of a dedicated network and teleconferencing facilities limit the impact of location on communication. Indeed, these specificities are not the differences in 'kind' (which may include foreign direct investment and diversification) but rather the differences in "degree" which relates to aspects such as increased cultural diversity, international interdependence, reliance on global processes and an identity which is not always limited to its local context.

At the individual level, the plurality and complexity of multinational corporations is mirrored in the wide variety of cultural backgrounds, cognitive models, values, beliefs, experiences and roles of employees. These challenges are succinctly captured by Chang and Taylor (1999), who observe that MNCs must function "in more than one environment, and respond to a complex set of factors such as the diverse nationalities of employees, floating exchange rates, geographically imposed problems of communication and so forth...MNCs can also be characterized as a group of geographically dispersed and goal-disparate organizations ... essentially, they are workplaces where different ethnicities and cultural values are intertwined" (Chang and Taylor, 1999: 541-542).

It is understood that organizations seek to limit or minimise these differences in order to ensure corporate functioning while still retaining sufficient diversity to remain innovative and creative. This is achieved through different processes of socialisation, acculturation and identity management. Organizations try to impose or inculcate organization-defining values which distinguish the organization from industry comparators. In order to capture the nature of these values and their perception by internal stakeholders, this research seeks to highlight

the key features of the institutional and organizational context in order to provide a broad perspective on analysis.

In conducting research into the implementation of corporate safety policies within a multinational utilising Poole's (1995) model, Janssens et al. (1995) again highlighted the importance of context. They argued that, "Poole's comparative framework needed to be modified to account for differences between multinational sites...cultural values and social, economic, and legal structures in an organization's home country are expected to affect its corporate policy ... since organizational practices, shaped by different cultural value systems, reflect managers' assumptions about how to manage people and the management structures that result from those assumptions ... the model is likely to be different in different cultural settings" (Janssens et al., 1995: 367). The above arguments provide a backdrop against which this research presents a brief contextual analysis of the case study organization. Further context related material would be utilised in the discussion chapter.

The sources of this contextual material vary and include material from third party organizations like Chatham House and Nigerian local news media reports, company publications such as the in-house newsletter, website publications and the Shell annual reports over the past 10 years. I also drew extensively from my own fieldwork observations which were noted within a field diary during the course of the research.

CHAPTER SEVEN

EXPERIENCING ORGANIZATIONAL CULTURE AND IDENTITY AT WORK – THE ROLE OF CORE VALUES

7.1. INTRODUCTION

The previous chapter examined the context within which Shell Nigeria conducted its operations. This chapter is the first of two empirical chapters which presents data from the case study organization. The data within this chapter focuses primarily on individual processes, exploring how employees experience identity and culture within their daily work interactions.

I will discuss and elaborate on employees' understanding of the organization's identity and culture from the values perspective. As was highlighted during the literature review and clarification of the theoretical framework of the study, definitions of identity and culture underline the prominence of values in defining an organization's identity and its culture. This chapter will seek to explore the utility of these conceptualisations to the understanding of employee's workplace experiences. The organization and presentation of the empirical material reflects some of the identity and culture themes which were highlighted at the end of literature review in Chapter 3 and which guided the development of the interview schedule.

7.2. UNDERSTANDING CORE VALUES WITHIN SHELL NIGERIA

7.2.1. Sharing values and the organizational vision

The review of literature conducted at the beginning of this thesis established that organizational values, visions and mission statements are strategies adopted by top management in an attempt to structure employee's subjectivity and ensure their commitment to organizational objectives or goals. Culture and identity theorists suggest that shared values can promote an individual's sense of belonging, security and self-esteem (Deal and Kennedy, 1982; Schein, 1999; Pratt, 1998), and provides a public declaration of what the company thinks it stands for and should be judged against.

In order to explore how awareness of these values had spread across the organization and become embedded in the consciousness of employees, employees were asked to list the core values or explain them in their own words. Some respondents were concerned that this was some kind of test where their lack of knowledge of the specific core values would count against them. I had to make it clear that they were free to choose their expressions or relevant terms so long as they could express the core themes of the values. A large number of the respondents were able to list one or two of the core values specifically, but then had to either reference other aspects of Shell's vision such as 'to be the employer of first choice' or 'to be the premier energy company in Nigeria'. An illustrative quote is provided below:

"Core values? SPDC core values, well we can talk about, eh to some extent..... Of course you know our mission is working to be the employer of first choice. Eh, and core values range from things like integrity, eh which a lot of us are not very confident to say (laughter). Yeah, because when you really look deep down into a lot of things you might begin to say, em are we really talking about integrity? But let's say maybe 90% integrity is good enough for an outfit like this. Then we talk about things like eh enterprise first. We want to do what would be best for the enterprise before we talk about the individual and so on and so forth. I can't remember most of them now but I know there are nine of them; nine core values, I can't remember them all by heart now" (37 years old male, AM well engineer, SG4, 8 years in SPDC).

Other respondents focused more on the associated behaviours such as leadership, accountability and good practice. A respondent elaborated that the core values were, honesty and integrity, respect for people, and diversity and diversity and inclusiveness and the associated behaviours such as leadership, accountability and team work. She confided that she was particularly aware of these issues as she had been involved in presentations on diversity and inclusiveness to new recruits during one of the key foundation SPDC courses called the ¹EP00- Introduction to Exploration and Production. Another respondent pointed out that these values had evolved since they were first communicated,

¹¹ The EP00 was a five week course for technical staff (mostly Engineering, Geosciences recruits) which explained the company's' business together with most of the new thinking on Oil exploration. A management development module at the end introduced elements of team working and strategic problem solving. Non-technical staff (e.g. HR, IT or External relations) were not usually invited.

“You know on a normal day these values; honesty and integrity, respect for people and diversity and inclusiveness would go right over my head. I had to do some research before I could communicate this to new recruits. These things evolve. First, they were seven, eco-citizenship, teamwork and so on. Now the emphasis is on the first three which I mentioned above. It’s just like the Ten Commandments; Love God and love your neighbour representing the entire Ten Commandments” (32 years old female, IT engineer, SG5, 4 years in Shell).

However, this awareness was not shared equally across the organization. Another respondent, an expatriate staff on secondment to Shell Nigeria described her impressions of Shell Nigeria’s core values,

“Core values, wow. Sometimes it’s difficult to tell what their core values are. They obviously value exploration and oil production. I’ve never really had anyone tell me what their core values are and the organization is so schizophrenic it’s hard to figure out what the core values are in the time I’ve been here. I really don’t know what their core values are. It’s almost the flavour of the month. What we’re focusing on now is HSE and cost management. When I first got here it was reserves replacement and project execution. I guess it depends on what the issue on the ground is at any point in time”(36 years old, female Principal SAP User, SG3, 2 years in SPDC but 6 years with the Shell group) .

The above description portrays Shell as being primarily focused on being reactive to its environment and context, sometimes at the cost of having a clear discernible vision or strategy. The rest of the interviews suggested that employees generally found most of the key themes related to the core values easy to recollect, though some questioned whether I was actually seeking to discover what was written in the ‘blue-book’² or to understand what the actual values of the organization was? I confirmed that this was the subject of further enquiry and their responses are presented below.

7.2.2. Displaying and living organizational values

Existing organizational theory suggests that values are essential for sense-making and do influence behaviour (Weick, 1995; Schein, 1992). It has also been theorised that identity regulation or construction processes that depend on sense-giving processes are aimed at the uncritical adoption of organizational core values (Pratt, 2000; Pratt et al. 2006). In attempting to shape or create an organizational identity, researchers have also highlighted the need to have a shared set of meanings and stories of organizational values or characteristics which employees are willing to subsume to (Willmott, 1993), which is accessible to employees such that it has salience within the organizational context. Such an organizational identity would

² The employee hand book containing the Shell vision, values and the guiding business principles.

be one that individuals value and perceive as important (Hogg and Terry, 2000). For Shell's management in pursuance of its elite identity, such values as 'honesty and integrity', 'delivering as promised', 'being the best', 'diversity and inclusiveness' and 'being the employer of first choice' were deemed to be highly accessible. These were publicised quite extensively on the Shell website and through other organizational media.

However, in order to explore the relevance of these values to actual day to day interaction within the organization, respondents were asked to articulate how these values were lived out within the organization. The responses were very illuminating. I was asked to clarify what I meant during several interviews. Several respondents asked, "Do you mean, how they *should* display these values? Or how they *do* display these values? Are you expecting me to generalise from my own experiences?". When I confirmed that their perceptions were important, they clarified that employees were expected to be honest in their dealings and display personal integrity and accountability as these were qualities that Shell wanted to be identified with. However, when I asked how they 'do' these values, I was mostly met with amusement. A typical response was from an IT staff who paused and then burst out laughing,

"We're doing good. Honestly, I would say we are doing good. With the transformation programme that's ongoing it is now more than just getting the crude oil flowing. With the advent of D&I (diversity and inclusiveness), there has been an increased focus on people issues" (29 years old, female IT Engineer, SG7, 2 years in SPDC).

Another interviewee highlighted the importance of stakeholder's expectations, both within the organization and in the wider society in structuring how Shell employees display these values which are integral to their identity. He observed,

"Em, most people dealing with SPDC staff whether in the office or in the community, expect a certain level of integrity. Expect a certain level of honesty from the staff. This to a large extent is being displayed by the staff and the people that work here in general. Of course like in any other society there are a few bad people, but as a group the society expects them to have a certain level of, em, integrity over and above what's the average in the community and I think this expectation has come over the years, you know, over the years of dealing with people in the company. They've come to see that a good majority of them can be trusted, can be honest, can hold their integrity high. So they raise the bar on the expectations. So, um, in general dealings in a country where no one will accept a cheque from you, they are likely going to accept a Shell staff cheque. In a country where nobody will extend a credit facility to you, they are likely going to extend it to Shell staff maybe because of that track record which they've shown. That if they accept a credit, they will pay. If they give you a cheque, it's likely not going to bounce. So, um, this is a manifestation of that integrity" (39 years old, male, SA storage manager, SG4, 11 years in SPDC).

Earlier discussions in the context chapter highlighted the complexity of the Nigerian environment, its diverse cultural landscape and the lack of accountability in public office due to the many years of military rule. A respondent argued that a disconnect existed between the wider organizational context and the values promoted by the organization and as a result was responsible for the hypocrisy which was widely perceived within the organization,

“I would say eh... as a company, it gives a very clear eh, description of what the company value systems are. Now, there is a disconnect between individuals and the company. So that each time the individual wants to speak for the company, these values are spoken and are expected to be the, eh, the key, the base line position based on which we act. However, I think based on eh, the reality on the ground, there’s a lot of disconnect between what people actually do when they come to their actions vis-a-viz these values. Sometimes they are just being spoken, but they are not being acted upon. Yeah, take for example, issues related to honesty and integrity; we are still very far from an ethically straight company. That’s my opinion and this is clear based on the fact that people go into underground deals or into poor contract management, unethical contract management behaviours that basically compromise the values of this company. This is both perception and feedback” (36 years old, male Dtl engineer, SG5, 5 years in SPDC).

Thus, while the respondent above agreed that the organizational values were clearly articulated and described, he suggested that these values were not sufficiently embedded within the meaning making systems of the organization to enable unconscious action. Employees were still making rational decisions on when to apply the values in order to avoid sanction or criticism from their colleagues. Some respondents tended to agree with this perception and a selection of quotes is provided below as an illustration;

“Yeah, SPDC staff actually do struggle to display the values, you know, but I would think that there is quite a lot of apathy in the system because I think the staff are a little bit frustrated at the pace at which, erm, how do I call it, the company is going at making sure that these things are really permeated, you know it’s kind of a bit slow. And many times when you sit down with staff it’s like the mission statements is all the things the company is not doing right now and don’t intend to do that’s what they put in the mission statements (Laughs)” (38 years old, male reservoir engineer, SG4, 6 years in SPDC).

Another commented,

“I see SPDC as a place that actually put down so many things to ensure that people work, get rewarded for their work appropriately. But I see most of the people that work in SPDC are people who are fake, they live fake lives. They say something and then they mean something different, there are a lot of fraudulent people here and it reflects on everything they do. If a manager comes in and says he wants this, people will all jump and justify it, yeah and the guy

goes away and they say the man is doing something wrong but they'll agree that that's the way to go because he demanded it. I think that is where I have a problem seriously. And I think it's the individual's that are the issue, not the company because the company is metamorphic, they are trying everyday to do things better but people here are funny, they're fraudulent, not necessarily in taking money but they're fraudulent in everything they do" (51 years old, male senior project engineer, SG3, 24 years in Shell).

An interviewee, who had just returned from a cross-posting to Shell Expro in Aberdeen- UK, was able to compare his perceptions of Shell's core values across two different Shell operations. He observed that,

"Well the core values is one thing and perception of how it's being followed, so to say is a different thing. The core values are quite nice and well thought out. Proactive. But my feeling about integrity...a couple of things are a bit worrisome there. I mean we've been out there in Shell Expro and we could see honesty and integrity. So, when we came in here a couple of months ago, I think in April. Just look at how staff take lunch. I don't think it tells well on the reputation of the company. People just filter all over the place and people disappear by 11:30am because they have to go for lunch. So, I think it's an error- enforcing condition so to say because you've got to go out. Well, maybe today I go out to somewhere near to the office and tomorrow I decide I don't like it again and I go somewhere far away and because I've got to beat the traffic, I've got to go early enough so I leave by 11:30am and come in about 2pm or so. I don't think it is something that is very sound for a company like this. That's one. The other thing is when you look at the way SOFu³ was implemented. We've got clear guidelines on how people were going to be selected, how positions were going to be manned but if you look at my team for instance, if you look at the level of jobs in this team and the level of jobs in another team in the same directorate, you begin to see discrepancies. It appears..... I don't see a level playing ground in how things are done in the various departments" (38 years old, male senior project engineer, SG4, 6 years with SPDC).

These comments seem to highlight that values and the meanings attached to them were perceived to be strongly context dependent. In such cases, employees were concerned that Shell was inadvertently being sucked into local practices which would likely limit its control over staff activities and which were in negation of its core values. Thus, while some respondents attributed the lack of identification with these values to the pace of change, others indicated that the nature, frequency and communication of change could all be factors affecting the uniform adoption of these values within the organization.

However, there was also acknowledgement that the organization retained some level of control over how employees utilised or displayed these values in their daily interactions, especially when engaged in company business. An interviewee observed,

³ An acronym from Securing Our Future (SOFu) –the major Shell transformation and downsizing exercise which was ongoing at the time of the interview.

“I think to a large extent it’s done and the way the organization is structured, the organization has some controls in place. First of all, to ensure that at least in executing the company’s business that you have check points; checks where somebody goes through your own processes to ensure that in doing your business that you are exhibiting those core values of the company. Of course in few cases, you get cases of fraudulent practice, you get cases of people not exhibiting those core values in the execution of their job but, organizationally again, if that is discovered, appropriate sanctions will be carried out and there are some consequence management procedures in place. So basically, I think the practice of the core value is embedded, like from the percentage perspective I would say like 90% of SPDC staff have embedded these core values and there are like 10% of the organization that SPDC is still struggling with” (39 years old, male, senior telecoms engineer, SG3, 11 years in SPDC).

The efficiency of these controls was questioned by other staff who suggested that the pervasiveness of the Nigerian factor meant that corruption did not simply fade away. Corrupt individuals who circumvented the organizational values in dealings with contractors were only punished if they got caught. Thus, there was a need for employees to monitor each other using a form of clan control to ensure that values were applied and adopted uniformly across the organization.

In terms of disseminating these values, employees indicated that Shell used a variety of media such as web messages on the intranet, cascades from managers and supervisors, symbolic media such as posters, t-shirts and mouse-pads where these values were detailed and road shows which were co-ordinated by the change management and transformation team. For some respondents, the web presence where they were constantly reminded of these values when they log onto their computers everyday was a very visible and prominent way of reminding them of what the organization stood for. Additionally, the constant mention of these values on the managing director’s blog and web forum indicated that there was top management support and ownership of the values. However, other respondents indicated that tangible reminders such as posters which they see frequently on the display boards or a mouse-pad on their table would be a preferred option. A respondent suggested that the Shell t-shirt was particularly important as this ensured that she was continually reminded of Shell values even when at home, completely outside the organizational environment. In a sense, the presence of this t-shirt converted her home into a quasi Shell environment and she felt bound to abide by these values.

7.2.3. Value congruency

Value congruency (i.e. the sharing of similar value systems among different employees or between an individual and the organization) has been the focus of research in recent years (Posner, 1992; Meglino and Ravlin, 1998; Knoppen et al. 2006). However, research of individual-organizational fit has a long tradition within organizational studies. Values according to O'Reilly et al. (1991) represent normative beliefs and thus are capable of guiding behaviour. These studies suggest that positive outcomes may accrue to the organization when individual and organizational values align.

When asked if their values were congruent with the organization's values and if they felt any sense of conflict with these values, respondents were generally intrigued by this question and some interesting discussions ensued. Some respondents were unsure whether their values had developed as a result of their interaction with the organization or whether this interaction had merely enhanced their own existing value systems. As a respondent commented,

"Yeah. Whether it's by virtue of me working here and hearing them and the company values have become my personal values or that there is a tie actually, I don't know. I was in a class, of about forty something people, when we were asked to write our personal values, just the first seven. When we did this, they split us into different groups of eight or so, and we were asked to group the values into levels and priorities and then harmonise them into one value. When all the groups presented their results, it was just the same values being presented using different words. We were saying the same thing! I really wondered whether the company had created clones of what they expected out of their values" (29 years old, female, IT engineer, SG7, 2 years in SPDC).

Some respondents attributed their decision to join or remain with Shell to feelings that Shell's values were congruent with their own values and that these values were an integral component of Shell's identity. A respondent replied,

"Yes, for me of course my values align with Shell's values. Personally, that's one of the reasons why I've chosen Shell and I've stuck with Shell. Theoretically, the values work a lot of times, or rather the values are my own personal values. Like I said, 'theoretically' (emphasis on the term by the respondent), but when you work with people you observe that a couple of people don't demonstrate these values and at times it erodes your own view of what should be a complete deliverable within the system" (42 year old, male senior drilling engineer, SG3, 11 years in SPDC).

This observation highlights the feeling among staff that values which are merely documented in vision statements or on scorecards were considered to be only aspirational values within organizational realities. These values captured the aspirations of top management and staff who wished to return to the glory days of Shell when Shell's identity among stakeholders was generally positive and Shell was considered the employer of choice and the top oil company in Nigeria. It was suggested that values achieved meaning and relevance when they were demonstrated or performed within organizational settings. As the respondent above noted, when these values were not performed there was a real risk of value attenuation which had an impact on identity formation and maintenance. In confirming this popular perception, a respondent observed,

"There have been a lot of communications lately about values, giving out personal cards to refresh our memories about these values. But for me, those might not be overtly, erm, they are not that effective. Those are little things, so it's like, putting people back in cubicles.... For me, the way these can be more effective is in the demonstration of these values by key officers of the company. Which I would say at times is suspect" (36 years old, male associate production engineer, SG5, 6 years in Shell).

Another reiterated that ambiguity about how the Shell values and the associated behaviours should be implemented mostly arose out of contradictory top management behaviour. He commented,

"In some cases we agree, my values are consistent with Shell values. But in a lot of cases you will find that the company or the organization in many instances has not kept to those values. It's a little tricky here to say if it's the organization or the people involved in the organization. A good example is when the company says ok this is the directive; lets take A and everyone says yes, A is integral. At the end of the day, A is something that will ensure our integrity and maintain this and that. However, you see that the company at times supports the decision that it's going to do B which is in negation to the A already planned and for you it disagrees with your personal values like integrity. I'd say NO, I'd have preferred us to take an A but the company believes in a B. However, since it's the company image that is projected, the way to go turns out to be a B" (35 years old, male hub associate engineer, SG5, 5 years in SPDC).

However, other respondents were more dismissive of any notions of value engineering and highlighted that organizational values are almost always associated with generic and desirable social values. As such, Shell was not doing anything different from any large organization where staff interact with each other and the wider society. As a respondent pointed out,

“Um, working inside SPDC for as long as I have, I think my own personal values have always been what are paramount. I do not fully believe it’s the preaching’s in the workshops on SPDC/Shell values that have changed my values that much. No.” (39 years old, male SA storage manager, SG4, 11 years in SPDC).

However, an underlying narrative in these discourses was that though these values were universally appreciated as desirable and aspirational, these run into difficulty once confronted with the ‘Nigerian factor’ mentioned earlier. As a respondent commented,

“Yeah, I think the company values are eh, formatted according to ideal international standards of human behaviour. Now, Nigeria as it is, the society is not compliant with that kind of expected human standards. People do abuse other people’s rights. People do oppress other people, do em, deny others opportunities for some reason. People don’t feel positive to others. So basically I will feel that the disconnect is based on that interest that people are more like in Nigeria, the larger Nigerian society... are more inclined to protect their own personal interest rather than the general interest. The general interest may include the company interest. Yeah. So given the opportunity, some people may protect the company interest. There are people like that. But few people want to sit down and say hey ‘I have this personal opportunity to do this for myself and eh, I think I will not do it because I’m ethical’. It’s typically Nigerian. It’s a function of the corrupt nature of our society I would say” (44 years old, male senior process engineer, SG4, 6 years in SPDC).

This then raises an important question. Given that Shell operates in an environment where commentators have observed that, “It is impossible to absorb the prevalence of corruption and its discontents in Nigeria without concluding that corruption has become heavily implicated in Nigerians’ view of their own culture” (Smith, 2007:225), it was considered important to explore what processes, if any, Shell employs in socializing employees into the culture and values they wished their employees to adopt. The next section explores the notion of socialization within Shell Nigeria. It examines employees’ perceptions and responses to organizational socialization practices. Do they consider themselves passive victims and spectators or do they also act and structure the realities of what they perceived and imbibed so as to avoid the displacement of their own sense of self?

7.3. EMBEDDING VALUES IN ORGANIZATIONAL CULTURE AND IDENTITY

7.3.1. Socialisation practices

During the course of the interviews it emerged that the indoctrination process into Shell Nigeria was considered by employees to be ad hoc, piecemeal and inconsistent. Indeed, a number of employees questioned the efficacy of the indoctrination process. These were mostly older employees who have been in Shell for eight years or more. These employees indicated that their awareness of the organizational culture and identity of Shell as new staff had a peculiar ethnic context which was possibly distinct and different from what existed in other Shell operating units. A senior manager recalled his early experiences when he joined the organization and the lack of any formalised approach to value internalisation. He noted the response he received from a senior colleague regarding the existence of any structured process by which new comers were supported so they could understand the organizational culture,

“There is nothing structured. In Shell it is every man for himself” (49 years old Male subsea engineer, SG2, 25 years in Shell).

Nevertheless, he noted that he later discovered that this was not always the case across the entire organization. He narrated how a new colleague, from the Yoruba tribe of Nigeria, joined SPDC without any existing social network within the organization. Yet, within a couple of weeks he observed that existing Yoruba Shell staff took him in hand and went through a process of induction which the company as a whole was not offering. On further investigation he discovered that this was a well established process among members of this tribe. Members of other tribes were either indifferent to these alternative structures of coordination or focused solely on their individual career progression within the organization. It should be noted that within the Nigerian context, certain tribes are described as possessing a distinct collective orientation while others have a more individualistic culture (Hofstede, 1983).

Not surprisingly, members of the Yoruba tribe described in the example above are perceived to have a marked collective disposition and this may explain their motivation to establish alternative processes to facilitate integration of their tribal members. Incidentally, the

manager who was told, “There is nothing structured. Its every man for himself”, belonged to the Igbo tribe who have been characterized as having a very individualistic culture within the Nigerian tribal context⁴. Thus, in the absence of established organizational processes, employees stepped in to fill the vacuum with quasi-official processes which could possibly encourage the establishment of orthogonal sub-cultures within the organization (Martin and Siehl, 1983).

This example ties in with other evidence of fragmentation of culture (Martin, 2002) unearthed during the course of the interviews. In another interview, the respondent reflected on his experiences when he joined Shell. As he had been previously employed by TotalFina Elf, he was able to compare his socialization experience across both organizations. He observed,

“Well I attended one course they call the EP00. So that was my first time to be thrown into the midst of SPDC people. A couple of people were new and a couple of people were old as well. The interaction really helped me understand how things go. So I think that was basically my step up socially in the company. It helped me understand what was going on. Well, there was also the Shell club as a medium whereby one can become socialized but I am not the club kind of person. Within the team; we have a closely knit team. We had team building events so there was an opportunity to get in, interact with people and understand how the system works... More formal processes would have been better. Have a forum where you get people together, have an orientation session. It happened to me when I joined Elf. I had a five week orientation session. Moving from one department to the other, go to the field; go to all the areas of operation. You are attached to the person in charge; the rig supervisors or the camp supervisors. You get to see people, see how they work, you get to understand how things work. That was a lot better. Here I was just dropped in and I started running. I think they started something after we joined, because we made our point that there was nothing” (38 years old, male project engineer, SG4, 6 years in SPDC).

Some other respondents suggested that the organization also used training courses as pseudo socialization practices or to cover up failures in the induction process or rather, the absence of a clearly structured process to ensure smooth integration of new members into the organization. He narrated his experiences when he joined the company,

“Well, I arrived in Shell I was all excited that I was about to start work in this big organization. I was allowed in at the gate and directed to HR where I met the contact indicated on my letter. After a long wait in the reception area, he turned up, introduced himself and suggested that he take me to my line department. When we arrived at my section, it was immediately obvious that the Manager was not expecting me. Nothing was set up. I did not have a desk or PC (personal computer). I really felt unwanted. After a bit of running around, they found a chair and I was told to sit with an older geophysicist who would talk me through what they did in that section. The HR man went in to have a discussion with my

⁴ I am of the Igbo tribe myself and this is a common tribal allusion in Nigeria.

manager and this lasted a while. When he left, my manager called me into his office and told me that some courses had been arranged over the next six weeks which were useful to new subsurface engineers in the organization. I went off for the six weeks, came back to the office and I still did not have a computer! This finally appeared after a couple of weeks but I did not have a clear work objective within the team. I really wondered for a while why I had been employed. I certainly did not expect that I would spend the first few months of my employment attending courses and making photocopies” (36 years old, female production geologist, SG4, 6 years in SPDC).

When I recounted this interview to other employees, they regarded this experience as a typical example of the settling in process in Shell. Some provided experiences or examples which indicated that as new employees they perceived no clear ownership of the orientation process. HR as a strategic organizational gate-keeper, was expected to play this role of managing the end-to-end welfare needs of employees. However, in most of the cases examined during the course of the interviews, they were perceived to be either unwilling or uninterested in integrating an orientation schedule into the recruitment program, such that employees could experience a smooth entry into the organization. Indeed, some new recruits to SPDC mentioned that they had developed a social network called the new joiners network. This informal network aimed to connect relatively new employees so they could share experiences and integrate more fully into the organization. For example,

“I would say the on-boarding processes more like, eh, from HR are surely inefficient and mechanical. There are other initiatives from say the new joiner’s network which I’ve seen as an attempt to bring on board the new people, to feel part of the company and have a better understanding. In terms of social interaction, I would say we don’t have much. There are TBE’s for example. TBE’s tend to be more official than social. So instead of team building and socialising, - some teams actually do have some component of socialisation- but there is always the tendency to officialise it. And you will see presentations in team building events for example. And there is also the lack of demarcation between an away day, and a team building exercise. So almost all teams tend to juggle these together and they lose that em, what you’re looking for in both. And then, maybe until recently, I would say new joiners don’t have an idea of what this company is all about. Nobody to probably steer them. The coaching scheme has been on paper, but has not taken off properly. So and em, as a person socially joining a family I would say, a huge family, one tends to just come and get lost. As in, what is expected of me, what do I need to do initially” (33 years old, male IT help desk supervisor, SG6, 3 years in SPDC).

I was informed that HR showed interest in the new networking scheme, indicated that they would take it over and give it some high level strategic importance within the organization. At the time of the interviews, employees felt that the project had been smothered and shelved by HR. Where some strategic intent was unearthed, employees indicated that this was ad hoc,

patchy and lacking coherence. An expatriate staff recounted her experiences of socialization (or more accurately the lack of socialization) into SPDC thus;

“When I arrived here, I thought that SPDC would operate like Shell in Houston. Well, I guess I was being naive as no place can operate like any other. But no one really sat me down and said these are the procedures and these are the, you know..even the social thing because its more than just doing your job here. It’s about how you relate to people, the relationships. No one sat me down, it was always trial and error. When I make a mistake its ‘don’t do that again’. There wasn’t an on-boarding other than ‘this is your PC and work on SAP stuff’. There was no attempt to define the job and it was not really the job I ended up doing. When I got here, that job was being partly done by someone else and another guy, he gave up part of his job to me. It wasn’t really clear. There was no on-boarding. It was just jump in and start swimming” (36 years old, female principal SAP user, SG3, 2 years in SPDC).

When I expressed amazement at the lack of a cultural orientation for expatriate staff, she elaborated further,

“I didn’t go to that class. Because that class is offered in the Hague, but its only offered to people who don’t have young children. So I showed up and I said I have a small son, what can I do? And they said sorry, no classes as your kids are not up to 15 years of age. Both my kids are younger than that. So when I showed up here, it’s the very first time I’ve ever been in Nigeria. My first experience of the culture was when I landed in Lagos airport” (36 years old, female principal SAP user, SG3, 2 years in SPDC).

This discussion highlighted failings in Shells expatriation policy where cross-cultural training was not implemented due to bureaucratic processes. It also surfaced a highly sensitive political issue within Shell Nigeria, which had been taken up by the Nigerianisation debate mentioned earlier in the context chapter; Shell seemed to recruit staff when there seemed to be no clear imperative to do so. This was especially striking when this involved expatriate staff. There was obviously a gap in communication between HR and the line departments.

Some employees who had been in Shell for more than six years were able to point out that there had been structures and processes for socialisation inside and outside work but these had faded away in importance once cost minimisation became the primary strategic discourse.

“It was the informal ones which tended to, erm, help to crack some of these hidden and soft issues but these have completely been taken away. If you know what I mean, things like away days. These days’ people talk of budget, budget, and budget. So you find out that there’s never a time of letting up. I remember when I first joined, I mean, every year you had like 2 or 3 away days. At the away days you know, you loosen up with your manager and stuff like

that. People could come out and give, you know, feedback in a less formal atmosphere. They could take a look at the business from, how do I call it, an amusement point of view. While you are actually saying the truth as it is, you understand, you are actually having fun at the same time and all of that. You know, normally we used to come out from some of those sessions with action items and deliverables” (42 years old, male principal front end engineer, SG3, 16 years in SPDC).

Employees and their families had access to fully fitted recreational facilities at both Shell operational locations and teams were encouraged to hold team building events to ensure team cohesion in a relaxed environment. There was also the annual NIAC⁵ celebrations and various significant milestone events such as the 25 years long service award ceremony for staff. However, employees indicated that once costs became an issue, these were the first activities to go. Interestingly, some respondents expressed some reservations about these social functions based on some of the peculiarities of the Nigerian social environment. One interviewee observed that although these are family friendly events, the dynamics within the Nigerian context where polygamy is allowed in some traditions is often an organizational challenge. He noted,

“Yeah they’re supposed to be involved but that’s another question, getting families involved, that’s my own opinion. One of the things, SHELL is supposed to be a husband and wife sort of company, that’s well and good, one of the things I also wonder is that when we bring ideas from over there, let’s not just dump it here and apply the same way, we have to look at the culture. One thing I’m always against is bringing something from abroad and thinking that it will work here, which family are you going to invite if a man has 7 wives. The point I’m trying to make is that we have to be careful doing certain things, because they’re doing it in other places doesn’t mean we have to apply the same here” (45 years old, male senior production geologist, SG3, 15 years in SPDC).

7.3.2. Hierarchy, Power and control structures

Despite the glowing descriptions of empowering and challenging work on the Shell Nigeria website, not all employees enjoyed this high level of work variation and empowerment. Certainly, there were respondents who highlighted the importance of the work they did in forging a specific group or professional identity, however, some respondents suggested that most of the work was routine and uninspiring. As a result an awareness of power and politics

⁵ Nigerian Independence Anniversary Celebrations held on the 1st of October each year to commemorate Nigeria’s independence. Staff, their families and external stakeholders were invited.

within the organization became necessary employee tools to survive and progress in their careers. A respondent commented,

“I believe that if you're doing something that is not very mentally engaging after a while, like most jobs we do in SHELL issuing files, managing contractors, filing invoices, designing systems that have been designed before.... You find other things come in, other criteria come in like eh loyalty, politics and if you're not very good at that then it hasn't engaged, that if you're the kind of person that stripes your mouth (i.e., mouths off or talks a lot), and your Oga⁶ tells you to your face that you're very theoretical then you know that you'll have to make up for that. Having said that, opportunities may also come your way like the story of the Ted, maybe it's just a question of when the time is right” (48 years old, male, community relations adviser, 26 years in Shell).

Hierarchy was palpable in Shell. Employees likened the organization to a military camp where you were always aware of the rank above you and took care not to give offence. The salary group and the role occupied by an individual was considered similar to military ranks with reference to categorisation of Shells organizational culture above and provided significant perks and privileges. Access to a company car was regarded as evidence of progress within the organization as this was a significant status symbol. The type of car also symbolized how far up the career ladder you had progressed. All these perks were part of management strategies to motivate and reward the best employees in the organization. Hence, these reward structures contributed to the construction of an elite social identity within SPDC. However, as has been pointed out in previous research, tensions may arise within organizations during the formation of elite identities and groups as the perception of exclusivity may lead to feelings of envy and discontent from those excluded (Alvesson and Robertson, 2006).

In an attempt to counter some of perceived limitations of hierarchy within the organization, Shell Nigeria embarked on a programme of de-layering and introduced informality within the organization. Managers encouraged employees to call them by their first names. Shell also deployed an open plan office strategy across its various locations. These initiatives were meant to empower employees, make them more proactive in decision making and to demystify management within Shell.

⁶ Pidgin English expression used in Nigeria which is roughly equivalent to the word 'boss' or 'manager'

Some respondents complained that these initiatives, though well meaning, were neither culturally sensitive nor well thought through. In Nigeria, it is considered very ill-mannered to call someone senior to you by their first name. At the very least you are expected to greet them respectfully whenever you see them, some tribes go so far as to make a prostrating gesture to signify respect. Thus, this initiative ran counter to most employees deeply ingrained cultural behavioural responses and caused great awkwardness. During my fieldwork, this was brought to my attention rather forcefully by a respondent who pointed out that I had remained seated when greeting a manager! Furthermore, he pointed out that my tone was rather casual when making the greeting. Suddenly aware that this was considered a cultural gaffe, I explained apologetically that after being away from Nigeria for so long, I had gotten used to the habit of informal greeting both in the workplace and in the wider society. However, I was aware of the need to avoid further slip-ups during my tenure within the organization. This interaction was important in highlighting some of the expectations which I had to fulfil for respondents in order to maintain the desired level of access in the organization. Thus, it appeared that though I had come in from the UK for just the fieldwork period, I was still considered very much one of them.

I observed that staff actively sought an alternative to the company proposed informality. Employees reacted by making up pseudo titles which introduced some formality and the required level of respect to senior level staff. The external relations manager was popularly called Sir P (from his first name), the transformation manager was called COP (from his initials) and only their peers at the same level within the organization could really be considered as being on a first name basis during interactions. Reflecting on the conflicts employees faced in resolving the demands of the wider Nigeria culture of respect for elders on Shells' vision of empowerment, a senior Shell staff observed,

“You have this conservative culture that cuts across the organization. You know, respect for your senior, deference to people that are older than you, even though they are going wrong people don't say anything. Those are the kinds of stuff I am talking about. The company environment also tends to affect the way you respond. Where it is a company that empowers, a company that provides an environment where you can challenge opinions, then you truly find yourself aligning with that culture even though your own environment does not naturally support arguing with your seniors, even though it's wrong. But you find an environment that is a bit different and you are empowered to say your views and you won't be penalized” (44 years old male, project accountant coordinator, SG3, 12 years in SPDC).

It was accepted within Shell that this inability to challenge opinions was compounded by a risk-averse culture. Employees perceived that raising their heads above the parapet seemed to make them targets and they received no thanks for this effort. This aversion resulted in the creation of insulating and protective layers of bureaucracy. Shell thus seemed to have developed an identity of indecisiveness which ran counter to their aspirations of being the industry leader. As a respondent noted,

“It is taken for granted that our decision chain is too long. To put a contract in place, for example, it might take us up to two to three years. A contract of that same value in Mobil, they can turn it around in three to four months. Same content, same quality. But we, we have layers of processing that you need to pass through. We say empowerment with words, but empowerment that people are penalized for, I don’t know. The organization is risk-averse. Whereas, some other organizations don’t take unreasonable risks but they are allowed to be creative in their solutions” (42 years old, male project engineer, SG3, 14 years in SPDC).

Reinforcing this point, an interviewee railed against the lack of freedom to express himself and show some initiative. He argued,

“Eh the only thing just like I said, there’s always that conflict between procedures, professionalism and performance and eh, I think for the job I do there should be some latitude for you to use your initiative. And one thing that becomes very clear is that because they have a lot of procedures and all those things, people just try to follow instructions, which for me is not a very good thing. That’s where I have a problem. I mean, I think people should be given responsibilities and trust them enough that they are capable of executing that responsibility, give them the lee-way, they get on with it. Just leave them to do it and if they fail, you handle them and point out that “you failed”. If I want to do anything, I clear it with somebody, who clears it with somebody, who clears it with somebody else! I may do something genuinely profitable but if I cut short the procedure, I get into trouble and like what they say, “if you repeat the same thing, you get the same answer”, so you never go above a certain level of performance”(42 years old, male senior drilling engineer, SG3,15 years in Shell).

Thus there was widespread acknowledgement that despite all the discourse on empowerment, management attempted to structure work performance through the operation of bureaucratic controls in the form of written policies and procedures. Indeed, a senior Shell manager commented,

“I believe I had more relative empowerment when I was a new petroleum engineer almost 30 years ago than at this point in my career when I am in charge of JV relations and among the top forty management staff in SPDC” (52 years old, male senior JV manager, SGLA, 26 years in SPDC).

The open plan office was considered a new and different culture shock for Shell employees. The hierarchical nature of work encouraged staff to work hard , gain the required promotion and receive a private office allocation as part of the reward for progressing within the organization This was a significant stage in the career of a Shell staff. The higher up the hierarchy, the larger the office and the better the furnishing. In the bid to combat hierarchy and maximize office space, this initiative had quite a few adherents but many detractors.

A practical challenge which was recognised immediately during the transcribing process was the level of background noise from ongoing conversations. This seemingly minor and insignificant change had profound implications in terms of how employees perceived their workplace and their effectiveness within that workplace. The open plan concept was adopted in order to encourage cross-functional communication within the organization, reduce the impact of hierarchy by making managers more accessible to their staff and of course to pool resources. For example, rather than have a printer in each individual room, a shared and communal printer was considered more cost-effective.

However, staff who were used to their own private space within secluded offices found this a concern on various levels. A manager observed that he tried to resist this new initiative on the grounds of confidentiality. He pointed out that he dealt with confidential documents, contracts and bids and that the risk of exposing information which would be of commercial interest to contractors was extremely high. He argued,

“ What do you think would happen if I give a contract staff a bid document to photocopy and who is paid just a paltry 50,000 Naira or so a month and he/she is aware that making an extra copy and handing this copy over to a contractor who needed such information could net them a hundred thousand dollars. Do you think they would hesitate to do so? I don't. I had to sort things out my own way by negotiating a stand-alone printer from a friend in procurement and setting up a screen around my desk. I was now fairly confident I could control access to my confidential documents. There is a time and place for open-plan offices and this is not one of them” (55 years old, male engineering manager, SG1, 28 years in SPDC).

It was significant to observe that the manager did not presume that the Shell values of honesty and integrity were sufficiently embedded to impede or counter employee's self-interest. There was a pragmatic acknowledgement that the Nigerian factor was probably of more relevance to the employee. It was equally interesting to note that even the manager's status within the organization and his special job requirements did not exempt him from this

initiative once it was given the go ahead. There seemed to be a sense of momentum, of an inexorable compulsion to implement initiatives regardless of any extenuating circumstances. Perhaps, the reluctance to accord the manager special status arose out of a need to demonstrate strong management commitment to change and parity of approach across the organization. Possibly, to suggest that even managers were not exempt from the consequences of change.

Regardless of the motives, it was a telling indictment that the manager was willing to subvert this initiative through his own social networks in a bid to protect the organization from itself. This open plan office initiative was held up as an example of top management adopting a process without clear consideration of its practical and cultural challenges. An interviewee commented,

“Open plan office is another thing that came from another culture. Its, er, supposed to make people sit closer to each other and work closely but in a noisy culture like ours, it makes people less efficient. It will be insulting to come into a room and see a number of people and not greet them. But in the cultures where it comes from, it will be insulting to greet them when you come to a room with a number of people. So, here a situation where one person has a visitor, everybody has a visitor. Putting a lot of people in the office means a lot of visitors and a lot of greetings. So that tends to be counterproductive. I think they can still achieve what they're trying to achieve in open plan offices by locating the people close to each other and still maintaining some space for each person. That is still making sure that one person does not disturb the other. That is important in our culture. Our culture is mostly communal based. A friend to one is a friend to all (Laughter)” (39 years old, male senior process engineer, SG4, 14 years in Shell).

Others were keen to suggest that once people became adjusted to the concept it would confer great advantages and improve efficiency. Indeed, staff that had experienced similar structural arrangements while working in Shell centre in the Hague or in Shell offices in London argued that the success of such initiatives elsewhere suggested that this would also work in Nigeria regardless of cultural difference.

With regards to culture and identity formation, the introduction of such initiatives stimulated resistance from employees who either wanted to maintain the status quo, or others who had genuine concerns that in the short term there would be a drop in productivity. Most presented this as another example of a scheme which was adopted wholesale from some management text without reference to the culture or context within which it would operate.

7.3.3. Progression and survival

As suggested above, promotion and progression, especially to top management grades, was commonly associated with loyalty to the organization, awareness of the power dynamics and not always with the individual's ability. Though Shell employs processes to estimate employees' potential at recruitment and throughout their career, this is not always judged to be objective and enabling. This process which assessed employees against a set of criteria which include competencies produces an output termed the Current Estimated Potential (CEP). This was a projection of the final salary grade or ranking an employee was expected to achieve by their Nearest Retirement Date (NRD)⁷. This potential was reviewed annually and could go up but more likely down depending on the quality of work the employee delivers but also on their skill in managing their immediate manager.

To highlight this common perception, a respondent observed,

"As I always tell people, you generally deserve what you get. If you are in an organization and you are rebellious to the powers that be, what do you expect? They are not assured of your loyalty and loyalty is important to progress in this organization" (51 years old, male project engineer, SG3, 24 years with SPDC).

Mavericks and activists were not always welcome but carefully managed or tolerated. A respondent provided an illustrative quote by recounting the experiences of a colleague who was termed a 'high-flyer' as his CEP was a letter category (i.e. his projected final salary group was expected to be LA, LB or LC). In Shell this indicated that he was tipped to end up as a senior manager. He narrated,

"I would say everything depends on the immediate supervisor of the new joiner. And I've seen people that start with the wrong foot and they get SOFU'ed⁸ quite early in their careers, in less than 5 years. And not because when you talk to those people....it's not because they're not good but there is obvious conflict between what they are having to put across and what their boss expects them to put across. But there was obvious conflict and that same young man – my mate- actually got SOFU'ed and he was a letter category as well so I wonder what are the problems here. And though I know the person – he's pretty very strong minded, very aggressive and a bit insensitive as well, so I can say he must have had a conflict with the SHELL culture of compliance. I would advice a new joiner and say 'hey be yourself' because that's the advice I got from my manager, that I was talking about. My manager once called me and said 'hey, you have some very good disposition. Be yourself, keep saying what you believe in. But be aware that not many people will be receptive to this and you will receive

⁷ Source: Archival material and informal discussions with Shell employees

⁸ Sofu'ed – coined from Securing Our Future which was the management term for the major transformation programme which was ongoing at the time of the fieldwork. In popular usage within Shell, this meant the staff was sacked or dismissed from Shell.

some knocks once in a while. If you bear with them and if we notice, we probably will come to your aid” (32 years old, male web services engineer, SG6, 2 years in SPDC).

To further highlight the importance of loyalty and politics in the organization, another respondent elaborated thus,

“I have this theory that if you are doing something that is not mentally engaging. After a while, like most jobs you do in Shell- managing contractors, filling invoices, designing systems that have been designed before you find out that again other things, other criteria come in like loyalty, politics. And if you are not very good at that then you may suffer. If your boss, for example, tells you that you are very theoretical then you know that you may have problems” (40 year old, male geo-surveyor, 11 years in the organization).

This illustrates the point that although Shell promotes itself as an organization which provides interesting and challenging work, this was not uniformly perceived to be the case by staff. Through both the component of some jobs and the bureaucratic element introduced by Shell processes, employees indicated that Shell did not utilise adequately opportunities to enrich jobs and empower the workforce. Employees confided that it was a tough call finding the right job to match both their skills set and their personal inclination,

“Sometimes it’s just a matter of waiting for an opportunity or just when the time is right. Take me as an example. I have been given a window to move up (progress) for the last two years but I have not found something that is in alignment with my spirit” (37 years old, male AM well engineer, SG4, 7 years in SPDC).

The support provided by Human Resource department in terms of managed staff moves was not positively endorsed by Shell staff and this will be discussed in a later section

7.4. ORGANIZATIONAL FUNCTIONING

7.4.1. Teamwork and inter-group dynamics

A range of studies have highlighted the importance of teams both as a foci of identification within organizations (Reicher and Levine, 1994; Riad, 2007) and as sites for contestation and organizational control (Ezzamel and Willmott, 1998; Knights and McCabe, 2003). The potential for the creation of an alternative or sub-culture and a unique identity exists when the bonds which tie individual members together is perceived to have greater significance and salience than the bonds which tie individuals to the organization. Theories on the formation and maintenance of team identity suggest the key factors include the team composition,

reason for existence, salience and ownership of activities being engaged in by the group and a common purpose (See Campion et al., 1996). Many respondents indicated that team working was an important component of SPDC culture. In terms of the decision making that result from team working processes, this has been described as sluggish leading to the development of a consensus culture. A respondent elaborated,

“I believe SPDC has a unique identity. Because I’ve worked in other companies and SPDC staff wherever they go you can see the confidence. And SPDC places a high premium on welfare and on training and developing their employees to be the best. But then again there are also negative things SPDC staff have. Is that also part of the unique identity of SPDC? Yeah, confidence bordering on arrogance. Ministry way of doing things, no rush, consensus culture. Everybody must take a decision on one small item for us to move a table from A to B. So consensus culture and very ministry like...” (39 years old, male learning adviser, SG5, 3 years in SPDC).

Additionally, some respondents pointed out that team working had associated costs in terms of speed of implementation of projects. Shell had developed an identity as the company which reviews all the angles in order to achieve consensus while market share continued to drop. As one respondent commented,

“ Erm, in terms of the industry you know, we claim to want to be the biggest but when you look over the years, you know, SPDC has lost a fair share of the market within Nigeria here, you understand and the staff have been watching that happen. We seem to be working a lot harder but we still find that the market share keeps dropping. In terms of salary, at one point in time we were the industry leader, but if you go around now you hear that we are like 5th when you put it all together. And erm generally when SPDC is talking of erm, improvements and stuff, we start, do a lot of talking, the competition comes and runs with it and we are still talking and nothing gets done. So you begin to wonder if really we want to be the true industry leader and all of those things. Technology wise, there are a lot of technology which the Shell group have actually been the pioneers of, you know and we find out that for years they’ve been talking about it and not implementing it and the competition is doing it and I mean making progress. And they are using the progress to capture our share of the market and you begin to wonder” (Male 37 year old Engineer, 7 years with SPDC).

Within SPDC, employees recognised that team working was now considered a desirable behaviour supported by a performance management structure. Hence, there was an awareness of the different attributes of teams and how these could contribute to individual and group success. A respondent pointed out that although some teams may be considered unique at inception, whatever attributes distinguish them are likely to be taken up by other teams, especially if these attributes increased the profile of the team or were linked to team success. When asked if he considered his team to be unique, another respondent commented,

“It’s hard to say. Those attributes that distinguish my team are beginning to be copied by other people. We are a new team and we started out as a very high-performance team in the sense that we displayed an unparalleled commitment to deliver, were very customer-focused, putting structures in place, defining models for operations but generally taking a wider view of the organization and thinking about how we can structure this very well. This is something we were highly rewarded for in the past two years and this is something other teams in IT are beginning to adopt as well.” (39 years old, male senior telecoms engineer, SG3, 11 years in SPDC).

The team attributes he subsequently described included generic attributes such as enhanced customer focus and commitment to deliver which may be easily imitated and copied by other teams. Additionally, there were some team characteristics such as team composition and the distribution of skills within the team which might prove more difficult for other teams to replicate. For example, he noted that this team was considered very technically sound. This was possibly because the barrier for entry or acceptance into the group had been set quite high. He observed,

“You don’t come into this team as a new joiner. Here you need to have a lot of experience in other areas of IT such as Information management, operational delivery, application development, because we set the standards and build the infrastructure to support those standards... Here, we have soiled their hands in other areas of IT. I think that’s a distinguishing factor in my team.” (39 years old, male senior telecoms engineer, SG3, 11 years in SPDC).

It was interesting and illuminating to note how the respondent above laced his description of his team with jargon from the management literature such as “high-performance team”, “customer-focus” and aspects of Shell’s espoused vision and values which include “delivery as promised”, “trustworthiness”, “reliability”. This suggested a higher level of indoctrination in Shell’s values than was immediately apparent when the respondent was first asked to elaborate on Shell’s values. Additionally, it demonstrated the invisible influences of management gurus in creating an awareness of/ and acceptance of the latest management thinking or research. It is important to note here that Shell staff of supervisory grade and above were routinely sent on management development courses. This may have led to a greater homogenization of views within the organization and possibly across the industry in terms of how organizational values are to be discussed and adapted within organizational settings.

This view of an elite status and a common focus contributing to a sense of identity was encountered in a number of interviews. Another respondent suggested that his team was identified for its excellent problem solving record. This perception from their line clients tended to focus the attention of the team on their shared purpose and helped define a unique identity as problem solvers. He commented,

“Yes. I think um as a performance optimisation team we’re seen as, we’re seen as um, - I want to be as modest as I can- um, I think the operations teams tend to see us as problem solvers. I’ve had somebody make comments and say if you want to know where your wife is, you should come to this team. They’ll find her for you. So, I mean, that’s the idea that the team is set up to help other teams solve problems. So, and each person is in-charge of certain project teams. So this....whenever they have a problem, apart from the processes that they go through, they just come to you, or send the whole problem and say ‘hey, you do this’. So you can help find the right thing to help solve it or you yourself do a little bit of research and solve it. Or even just tell them that hey, you have this solution somewhere sitting in your team. Because I remember it was done previously. So you fish out the whole report and say, this has addressed this problem. So we do that as a support. So it is part of our optimisation” (37 years old, male well engineer, SG4, 8 years in SPDC).

Thus, he suggests that their identity was not defined merely by the role itself, but rather by the feedback from clients. In appreciation of this positive feedback, the team revelled in this identity and continued to provide good service in order to nurture and maintain the identity. In another interview, the respondent suggested that their links with the transformation and change process entailed having to perform or function as a role model for other teams. This role as change exemplars and the performance that it entailed was essential in defining the team’s identity. There was an expectation that they would sell the benefits of a shared orientation to other teams within the functional area. He elaborated thus,

“Yes. I think very strongly that this team has a shared orientation and purpose. The reason is probably because we are in ourselves a transformation outfit of the well delivery team. So we’re pushing for change. We’re pushing for ways to do things better. So we have to demonstrate in many ways that er, doing things better entails having a shared objective, sharing information within ourselves. And even within the teams we have er, electronic learning and desk practice processes that actually get learning and sharing to other teams. So we need to demonstrate that all the time” (36 years old, male production technologist, SG5, 6 years in SPDC)

Teams that worked to strict deadlines on specific projects suggested that project focused work by its very nature tended to bring teams close together over a period of time. This close proximity with work colleagues fostered a sense of work identity which in certain

circumstances overshadowed any social identification with the organization. As a female project engineer pointed out,

"I don't know if this is specific to SPDC but the group I work in has a little bit of a more unique identity than what you see in SPDC. So we have bonded into a group within major projects. It's pretty much a kind of identity amongst ourselves, how we work together. I don't know that I feel particularly bonded to the other parts of the organization. Because we are project orientated, we have a goal. So it's not wishy washy, nebulous... We gotta build this pipeline. We are all focused on this. That's one thing that crystallises us, we are doing this stuff by this date. And most of the people have been around the world, a lot of different cultures and experiences. You can always find someone to identify with.....It's all men and me" (40 years old, female major projects planner, SG3, 12years with SPDC).

7.4.2. Sharing of Organizational resources

When asked if Shell as a company had put in place processes and policies to encourage sharing of resources, the majority of respondents suggest these processes exist. However, they suggested that issues arise which make these policies or processes difficult to implement. One of the issues which was identified was a misplaced sense of individualism. A senior supervisor on a oil drilling rig argued,

"Yes Shell does have processes in place. Actually you're encouraged to do that but you should realize something as well. I can talk of my own limited small community, the company encourages it, that's why you're expected to call in people that have done it before and other people who may have some experience that you don't have and try to put them together to help get the best out of it... so what I'm saying is that it's there, but maybe the more younger people may not be that way but the culture again in SPDC or what I think people do in SPDC is that, they'll have information that may help you and they keep it, then you make a mistake then they'll say 'hey, he has failed'...so that they'll look better than you, which I think is bad. .. Half of the time people keep quiet, watch you fumble and then come and provide a solution and everybody says they are intelligent; maybe they are intelligent I don't know but I think that's not very good for the company" (42 years old male, senior drilling engineer, SG3, 15 years in SPDC).

From the response above, the interviewee seemed to suggest that although there were mechanisms and processes established by Shell to encourage teamwork and sharing of resources, the culture within the organization undermined these through established competitive behaviour. The allusion to the younger ones seems to support the view that processes of inculcating a team focus and a shared orientation might be yielding results and countering the negative competitiveness which was deemed prevalent within the organization. Some respondents attributed this change to two factors; firstly, the relatively

new recruitment process through the SITP⁹ programme where potential employees went through a two year programme as a group, before being offered a permanent position in the organization. During this programme, team working skills were considered an essential component of the curriculum. Thus, staff employed via this programme were well schooled in the theory and practice of team working (Source: SPDC learning adviser). Secondly, the introduction of a team based performance matrix which rewarded team performance over the performance of the individual team member guaranteed that employees began to focus on group practices and processes. However, this optimism was not shared across the organization. Many employees perceived competitive rivalries of all sorts continued to affect established organizational processes.

7.4.3. Who are we? Who am I? Ask Shell employees

It was obvious during the course of the interviews that employees were constantly reflective of the nature of the organization where they worked and received constant feedback and reminders from the public when aspects of Shell's perceived identity was not in consonance with the aspirational values which they proposed. When employees were directly asked to elaborate on what made Shell's identity or culture unique, some came up with symbolic responses which either attributed certain qualities such as size (Shell is like an elephant), hierarchy (Shell is like a military camp), caring and responsive (a large family) but most indicated that Shell was just like any other large organization within the industry. Hence, there was a perception that there was some level of isomorphism with regards to the technology in use, the limitations within the organizations operating environment and the accepted methods of operation. As one respondent argued,

“Eh in terms of its area of operations maybe, in terms of the kind of thing they do which is essential in a big company, I don't see SPDC as being different from all the others. I don't know if you want to call their popularity a unique identity but because of their reach, if I were to go into details some of the other company are mainly into deep off-shore and a few handful of pipes scattered around. But SPDC on its own makes up more than half of the countries production. So we have about 80% of the swamp locations so you can see we cover a large area, so we are all around. As a result the uniqueness about SPDC, I think is in being popular, because in terms of operation we do about the same thing every other person does, there's nothing too unique about it” (34 years old, male reservoir engineer, SG4, 6 years in SPDC).

⁹ SITP – Shell Intensive Training Programme. A six year old initiative whereby the organization sought to improve the quality of recruits. This is discussed in more detail in the next chapter.

Another suggested that Shell's identity was unique especially where it was not contrasted directly with other organizational reference groups. Thereby arguing that dominance within an area was conducive to the fostering of a unique identity. Thus, in smaller communities the distinguishing aspects of Shell's culture and method of operation were arguably distinct. He cited the importance of organizational symbols, which are recognisable through long term association with an organizations culture, in presenting Shell's unique identity to stakeholders. He commented,

"Yes they have a unique identity especially where they are operating in a smaller community. In a small community like Warri, SPDC stands out. In Port-Harcourt which is a little bit bigger, it doesn't stand out so much. In Lagos it's drowned. So they have an identity which you can, um.. um, what is the right word.. you can identify with especially in small communities. In big communities where other companies operate and have their own identity as well, the Shell identity tends to be lost in t he crowd. But they certainly do have an identity and the Shell brand, the Shell Pecten is quite easily recognisable anywhere it is. But the fact is that, it is not anywhere anymore¹⁰ (Laughter). It's been taken out of cars, it's been taken out of the buildings and all that so the pecten which symbolises Shell is not really there anymore so that is why they are more recognisable in communities where they can stand out, where their number is appreciable" (42 yrs old, male senior drilling engineer, SG3, 15 yrs with SPDC).

Yet another respondent argued that Shell's unique identity was not just a function of size and industry but embodied cultural attributes which had been developed over time and which created and reflected expectations from their stakeholders. He suggested that,

"Yes, I believe that SPDC has a unique identity and I will illustrate. There used to be this popular saying, 'there are three ways of doing something. The right way, the wrong way and the Shell way'. This shows there is widespread perception from the public that Shell has a unique identity and way of doing things. Maybe the Shell way is better or worse, who knows. But the public and even Shell staff still generally feel this way. Shell's way can be slower sometimes, penny-wise pound foolish sometimes, but there is a Shell way of doing things. If you understand the size of the organization, you would understand why that system needs to be there, why that way of doing things need to be there otherwise we wouldn't survive. If you are building a school or drilling a well in a community, the level of quality they expect is higher than anything they expect from our competitors e.g. Agip" (35 years old, male major projects planner, SG4, 8 years in SPDC).

This mirrors the suggestion by some academics that cultures and the identity they create are inherently adaptable and context specific to ensure the organizations survival (Schein, 2004;

¹⁰ The Shell Pecten had been modified in Shell Nigeria such that it was no longer recognisable. An illustration is provided in Appendix 4.

Gioia et al., 2000; Corley et al., 2000). Here the respondent indicates that Shell's identity is forged in response to its size, dispersion and exposure to a range of operating environments, diverse stakeholder groupings and the expectation of quality from its audiences.

Shell respondents were clearly ambivalent in terms of how they regarded Shell's identity. From earlier analysis it has been demonstrated that a high level of ambivalence existed within the organization in terms of how key organizational attributes were displayed and contradicted. Many displayed discomfort and irritation at what they perceived to be some of the negative aspects of Shell's identity which were either recognised internally or had been fed back to the organization from its many stakeholders in the community and government. For example, an interviewee observed that,

“For SPDC, it's a two way thing in the sense that how does the outside world see you and how do you see yourself? Do you agree with the picture that SPDC shows to the outside world? Like I said you can't answer a yes or no in all entirety because in some aspects the image presented is the one you would want to identify with but in some cases the representation is not necessarily true. It differs from what you know as an insider is what really happens and as a result even though you want to be the B that they're showing to the rest of the world, you know in truth it's actually an A” (38 years old, male reservoir engineer, SG4, 6 years in SPDC).

However, another respondent whilst acknowledging that Shell's organizational practices sometimes contributed to the negative feedback received from stakeholders, put forward the argument that stakeholders' interest sometimes colours this feedback. He commented,

“Our identity can receive negative feedback not because it is not good, but because it does not fit the purposes of some people. I'll give you an example, Shell as a company does not believe in paying communities cash. That is an identity Shell has created that we don't give cash. Now, what we are going to do may be far more than cash. But if you want feedback from that community as an independent body on their perception of Shell's image, you would get a very negative feedback. Thus, we have a bad image because we are not acting in accordance with the selfish interests of a minority. I am not saying this is always the case. Sometimes we also make promises we have not kept and our identity is bad and I think that is why this has been added to our core values” (37 years old, Male geologist, SG4, 9 years in SPDC).

The respondent intimated that widespread feedback from stakeholders which suggested Shell makes commitments but frequently failed to honour them, had been taken onboard by the organization and enshrined as a core value. Thus, this was recognised by some employees as one way in which Shell actively responded to the identity threats by seeking to meet

stakeholders expectations on some of the issues highlighted as concerns. Delivering as promised was therefore considered one of the associated behaviours which enabled the core values to be effectively practised and communicated. This representation of external stakeholders as mirrors reflecting images back at the organization is consistent with previous organizational research on identity (Dutton and Dukerich, 1991; Dutton et al., 1994; Scott and Lane, 2000; Dukerich et al., 2002).

Shell staff were obviously attuned to the perceptions of their external stakeholders and this generated some internal disquiet. To illustrate this point, a quote is presented where an interviewee signalled his awareness of negative societal perceptions and felt that some of these perceptions were justified. He felt that his access to some internal organizational processes validated some of these negative public perceptions. He commented,

"Yeah, perception from eh...well you read it in papers where they talk about SPDC, what the public feels about us, you get that from interaction with people. Eh it's actually mixed, they vary. There's the kind of perception where some people believe they are the good godfather, it's when SPDC comes into the area and eh they tar your roads for you and they build a few blocks of classrooms and stuffs like that...well I call it that in terms of education they're ...they're not so educated to believe that SPDC is doing that much for them. But there are some other people that believe that they should actually do more because it's what they're involved in. Like I said it's a perception. You have a group of people who believe that SPDC is being good, is caring and quite a number of people who also are able to see into their bureaucracies and the organizational lapse in terms of efficiency, for instance when you have a spill and you know that when there is a spill, SPDC is supposed to contain it within one week maximum but you see that it's about 2, 3 months and SPDC has not done anything about it. You find out that maybe they're not caring enough. So it cuts across. The layman who just goes past the building and he sees this giant elephant with all kinds of infrastructures has displaced views. You understand, these guys (Shell staff) are living nice, the road to the company is tarred and every other thing is ok. And to the other person who is deep down in the community and into that sphere will say "these guys are corrupt, they're just messing us up". So it's a varied kind of thing, some will say "the big godfather" and the other guy says "the bad boy" (36 years old male, hub senior dredging engineer, SG4, 12 years in SPDC).

The respondent was very concerned about what he considered double standards on the part of the organization. He was also keen to stress that most activities carried out by Shell which could be considered caring and altruistic were sometimes coloured by organizational self-interest.

A Shell manager described his own sense of conflict when the identity publicly espoused by Shell to its stakeholders was contradicted by his own experiences. He recounted the following incident during an informal discussion over dinner at his home,

“We were constructing a long distance pipeline and we were advised by the government regulators to use blocked valves as this guarantees the integrity of the pipeline in case of an accident. SPDC deliberately decided to avoid putting in blocked valves primarily because of the difficulties of installing these valves at this location (name withheld for anonymity purposes) and cost. They manipulated the inspectors, sent them on overseas training courses. Now the regulators have found out what happened, they say sorry.... If all of us leave and this line gets ruptured by very likely incidents of sabotage or whatever and then you may have a major disaster that has fire is burning for years. What image will SPDC have? First of all it's against the law. Secondly, you are running a 50 kilometre -100 kilometre pipeline without a blocked valve and you are talking of costs! Is this compliant with global standards? Believe this or not, we have not yet landed on this, we are still arguing the issues. This is professional 'cowboyism' that they are doing here. I saw an article in August in the UK where they (Shell) were denied permission to lay a line until the government had done certain things and all that. I wanted to cut that article and bring it back home to demonstrate how things work when they are done properly” (56 years old, male senior Shell manager, SGI, 24 years in SPDC).

The above narration was illuminating as it demonstrated the various positions taken up by the Shell manager during this discourse. He starts off by recognizing his senior position and responsibilities within Shell when he utilises the inclusive term to 'we' as he describes the construction of the pipeline. However, he immediately distances himself from the decision making process by using the formal and anonymous reference 'SPDC', to detail activities which he felt were contrary to good practice and possibly illegal. He acknowledged that there was a potential risk to SPDC's image among its salient stakeholder by following this course of action. Furthermore, he intimated that as a stakeholder in the Nigerian society, walking away and doing nothing should not be an option. There was a palpable sense of frustration at the limited options he felt he had available to affect Shell's identity outcomes. However, he seemed to believe that drawing attention to the perceived double standards in Shell's operations in Nigeria and the UK might have had an effect on his management colleagues. That he did not follow through on this observation might be linked to the expectation that this might have a negative impact on his career, again providing an indication of how individuals' understanding of their role within the organization was limited by their perceptions of Shell's identity and culture.

Summary

This chapter has explored employee's perceptions of identity and culture. It was accepted by the majority of respondents that Shell's core values were clearly articulated and reflected desirable human societal values. These values were sufficiently loose to meet the needs of a range of stakeholders but also allowed the organization to retain some control through the definition of supporting behaviours. Where employees perceived that the aspirational identity articulated by the organization's management did not match actual practice, this gave rise to apathy, attempts at renegotiating which values were relevant and some dissonance. Where processes failed to meet the needs of organizational members, this vacuum was filled by quasi-formal processes. Employees indicated that where teams provided the foci of identification such as a clear vision, unique membership and culture, this became the primary form of identification over that which the organization promotes.

CHAPTER 8

ORGANIZATIONAL STRATEGIES AND PROCESSES SUPPORTING ADOPTION AND ENTRENCHMENT OF VALUES

8.1. INTRODUCTION

This chapter examines identity and culture from an organizational perspective. It explores the organizational level strategies adopted by Shell in seeking to craft what it describes as an elite identity, and communicating this identity to both internal and external stakeholders. Furthermore, it explores some of the implications of organizational re-structuring on employee identification or resistance. I shall further analyse the context within which HR strategy was formulated as well as employee experiences of its implementation. An attempt would be made to analyse the policies and processes that were aimed at supporting identity formation and maintenance together with their inherent contradictions. Employee perceptions of these processes and their reactions to the strictures of management control will be considered as part of this analysis.

For the purposes of this discussion, I adopt Shell's current definition of a stakeholder which is very inclusive and goes beyond the boundaries of the strict financial shareholder. Thus, stakeholder management in Shell involved the process of managing the expectations of everyone who had an interest in Shell or was interested in its outputs and/or deliverables. Of course, as the power, influence, salience and importance of stakeholders vary significantly, it is anticipated that Shell management would have devised various options to meet their sometimes conflicting requirements. I will therefore explore whether there were any variations in how Shell identified, managed or modified processes to accommodate their most important stakeholders in this section. From the outset, it is important to reiterate that for the purpose of analysis in this thesis, two main groups of stakeholders were identified. The first group, Shell's internal stakeholders, comprised of Shell employees and contractors who were directly affected by Shell's policies and principles, had to apply Shell's espoused values in their daily interaction with each other and the organization, and were likely to identify to some degree with Shell, its culture and its vision. Indeed, it should be noted that many of the internal stakeholders were multiple stakeholders in Shell. Some were members of the

community, financial shareholders, and employees. The second group, Shell's external stakeholders, on the other hand, comprised of all affected or interested parties to Shell operations who were not directly accountable to the organization for their employment or welfare, did not need to access Shell locations or understand the Shell culture and were unlikely to have an emotional or deep psychological attachment to Shell. These included, but were not limited to shareholders, joint venture partners, the government, host communities, and the wider Nigerian public.

A majority of staff acknowledged their position as stakeholders of Shell and sometimes even multiple stakeholders. For these staff, being a stakeholder enhanced their identification with SPDC. An employee who indicated he was stakeholder on many levels; employee, shareholder and Nigerian, felt that there was no conflict in the overlapping stakeholder roles he plays in the organization. He commented,

"No, I only see them as supporting each other. I see myself as an employee, supporting being a shareholder because, yeah definitely it means I have to do my best and secondly I have to get people to do their best as well and encourage others because it's to make sure we do what it takes to make this company succeed. If I was a mere employee I'll still do that but the mere fact that I have other stakes outside just being a mere employee alone drives me further. And also being a mere employee makes. I mean, you want to make a living, I don't have another job as well" (39 years old, male electrical engineer, SG4, 8 years in SPDC).

This was widely representative of the responses from interviewees. However, it would be inaccurate to suggest that all employees view themselves as significant stakeholders. As one respondent pithily suggested,

*"Key stakeholders are the directors of the company who get dividends depending on performance, the government who owns as well the product of what the company does produce and to some extent the communities which benefit from some of Shell's activities. The staff are now being regarded simply as tools. No longer a stakeholder, they come and go. They are employed when they are useful and when they think their performance is degrading for **whatever** (emphasis in tone) reason, they are let go. So they don't seem to be major stakeholders anymore because it could be you today or any person tomorrow, so there is no stake(laughter)"* (49 years old, subsea engineer, SG3, 25 years in SPDC).

Thus, I acknowledge that there was some diversity in how the notion of stakeholders was defined within employee's social work settings.

Shell's corporate vision was recognised as a key factor which not only drove the articulation of Shell's values but also provided strategic direction for the processes which would support their successful adoption within the organization. I shall highlight Shell's corporate vision below and explore in subsequent sections, the organizational structures and strategies which led to particular developments in the workplace. Throughout the analysis, employee's perceptions and reactions to these developments would provide an appreciation of the impact these had on organizational culture and employee identification with the organization.

Shell Corporate vision¹¹

Shell Nigeria places great importance on making a difference in the environment in which people live and work, fostering and maintaining relationships with communities, taking care to be a good neighbour and contributing to sustainable development initiatives (www.Shell.com - 2011)

8.2. WORK ORGANIZATION AND STRUCTURE

At the time of the fieldwork, a widespread transformation exercise had just been completed in SPDC with staff settling into new roles and adjusting to the new organizational structure. I have provided a schematic of the relevant organizational structure to illustrate the level of top management support for change within the organization together with inter-relationships between functions and directorates at the board level (See Fig. 8.1).

Based on the inter-relationship on the Top management chart below (Fig. 8.1), there is some indication that SPDC's commitment to the change and transformation process seemed to have top management support. As the Transformation and Change Manager reported directly to the Managing Director of Shell Nigeria. Furthermore, he was supported by a Communication and Change Manager who coordinated the messages that were targeted at SPDC's employees. Change Advisors were attached to Shell Directors to facilitate ongoing policy development within the individual directorates and to ensure a consistent approach to deploying change across the organization. During the course of fieldwork I was located within this team and attended strategy meetings and was involved in the planning of a major corporate employee engagement activity; the first People's week event in Shell Nigeria. At the level of the workplace, staff that were particularly enthused by the core values and the promises they proffered volunteered to act as change agents. Their roles was to update any change material

¹¹ Source: The Shell Nigeria website, 2011 (<http://www.shell.com.ng/>)

such as leaflets or documents in their work area, act as the first point of contact within their departments or sections on change issues and make inspirational presentations at team meetings when required to do so. Crucially also, these change agents were the eyes of the change directorate at the level of teams and departments, providing feedback on how change initiatives were adopted and highlighting conflict issues.

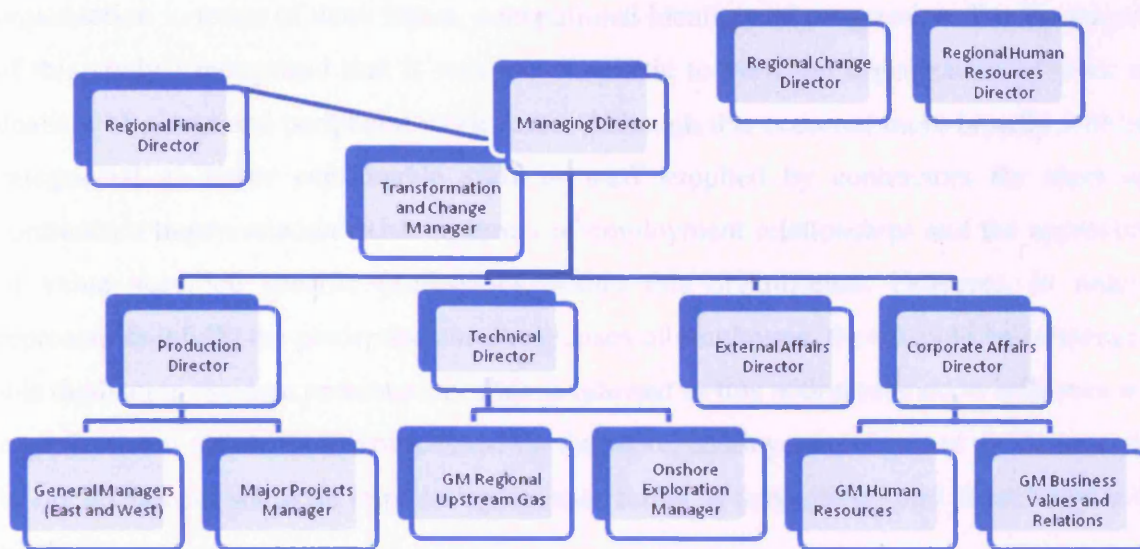


Fig. 8.1.¹² Shell Petroleum Nigeria Limited Top Management Chart.

As may be assumed for any very large multinational sprawled across different locations, hierarchy was considered an important source of co-ordination and control within SPDC. Extensive organizational charts were produced and updated regularly for all aspects of the organization and clarified individual roles and responsibilities and most importantly, the chain of command and accountability. Additionally, these charts also functioned as media which symbolised exclusion and differentiation within the SPDC organizational structure. Absence from or anonymity on the charts indicated that an individual was not completely accepted as a member of the organization even though there was a work role specified on the charts and someone was actually doing the work. This was mostly the case for contract staff whose positions were normally re-tendered at the end of each financial year.

¹² My version of the top management chart.

Work within Shell did not follow closely the up-skilling model proposed for post-industrial societies. Indeed it may be argued that both service work and industrial work existed side by side. In this relationship, service work was there to support an industry which is heavily industrialised and reliant on the technical skills and competencies of their staff. It would be useful to highlight that a majority of respondents viewed Shell as a multi-layered organization in terms of work status, occupational identity and progression. For the purposes of this study I recognised that it was too simplistic to view the organization of work as a dualism of a core and peripheral work force. Although this occurred more broadly with staff categorised as either pensionable staff or staff supplied by contractors for short term contracts, a huge variation exists in terms of employment relationships and the appreciation of value accorded specific professions within this organization. However, in order to represent faithfully the perceptions and responses of employees, there would be references to this dualism in the data presentation. This is relevant as this notion seemed to influence some organizational structures and processes. Furthermore, employees recognised the demarcations in organizational status as implicating various forms of subjectivity and identification with Shell.

At the core were fully pensionable staff who were considered to possess specialist skills¹³ required by the organization and who benefited from staff development structures and a range of welfare benefits. Peripheral staff ranged from direct contract staff that were located within the Shell premises, were paid directly by SPDC and appeared on the organization charts. These were the best paid of the peripheral staff but they were also exposed to precarious employment contracts. Their contracts were reviewed on an annual or biannual basis as such SPDC did not incur any costs if they chose to terminate their contracts. They did not have access to all organizational benefits such as use of the staff hospital for family members and overseas development training. Additionally, these direct contract staff were recruited to a specific salary grade, remained at that grade and were unlikely to be promoted. Further down the hierarchy were contract staff that were sometimes located within SPDC premises but paid by a contractor and linked to a specific project. The terms of employment, such as pay and

¹³ This was not always the case, as respondents confirmed that highly skilled staff were also employed by Shell on a contract basis. Some had worked for upwards of 12 years in these roles; with minimum development prospects and career progression. With the emergence of greater competition in the sector, Shell had sought to convert these contract staff to full staff status with limited success. Many simply left due to what they perceived to be Shell's strategy of sidelining their skills when the labour market was skewed in favour of the employer.

conditions of these staff were written into the project contract and were rarely reviewed by SPDC supervisors. Hence, in reality pay and conditions were worse than what was actually stipulated on the contracts. These contracts were project dependent and were terminated once a project ended. At the edge of the periphery were contractor staff whose only affiliation with SPDC was that these provided services on site but were wholly owned by the contractors.

Shell identity cards were the primary means of confirming status within the organization as Shell maintained a hierarchy of cards. All these different grades of staff had ID cards with variations of text or colour which was immediately obvious to insiders. Indeed, even Shell retirees had a different colour coded ID card which made their status apparent. It should be noted that for this research, the primary focus was on pensionable staff and direct contract staff as these were the only groups directly recruited into SPDC and who spent all their working time within SPDC premises. These were expected to be the likely targets of organizational identity processes and were continually exposed to Shell's culture.

However, as may be expected, the nature of this core – periphery relationship was a contentious issue for both fully pensionable staff and the direct contract staff. Direct contract staff were unsure if the identity claims ought to apply to them and questioned the level of commitment expected of them. To represent this view, a respondent observed,

“We feel like second class citizens. And you are always concerned about the job, when will it end? What happens if your contract is cancelled? I know where Shell comes from contract staff are paid big money because they have not got job security and they don't get pensions. Here we can't even use the Shell clinic and the money is a joke compared to industry standards. Yet you are expected to act like 'Shell man' on reduced pay” (female staff, preferred anonymity).

Similarly, another respondent argued that though he loved working for SPDC, the different levels of staff was a demoralizing factor to him and most of his colleagues. He commented,

“I've always felt intelligent and self-assured until I took a contract job in Shell. I love the job but everyone seems to think that full staff are smarter than you just because you are a contract staff and have a different colour of ID. It's really annoying but what are the alternatives? My family and friends know I work for Shell and think that all staff are equal. But I know better, all animals are not equal. There are 'Shell staff' and there are 'shell staff'. We are the ones with small letter 's' and we don't always feel we belong” (40 years old, male senior operations geophysicist, SG4, 3 yrs in SPDC).

This was an interesting allusion to George Orwell's novel (Animal farm) where the respondent highlights the difficulties of identifying with and sharing the objectives of the collective while there were glaring differences in status within the organization. Hence, although staff on contract were pleased by their affiliation with the organization which satisfied their ego and self-esteem requirements, they remained aware that they were not fully accepted members of the organization. Despite the lack of complete acceptance by the organization, employees within this group still derived some social, psychological and affective benefits by their association with SPDC. Indeed, for the man on the street they were all perceived as Shell staff and shared whatever benefits or risks were associated with this membership. This ambiguous relationship was also commented upon by some fully pensionable employees. These raised the spectre of trust in the relationships between full SPDC staff and the direct contract staff. A respondent speculated,

"Sometimes when you hear that people are compromising the core values it could be the contract staff. I'm sorry and I don't want to point fingers, but many of them are paid less than we are and there must be some envy when you consider they can't use most of the Shell facilities (like the hospital). If someone offers them something to facilitate a contract it's unlikely they would say no" (36 years old, male hub senior dredging engineer SG4, 12 yrs in SPDC).

This response highlighted some of the seething tensions underneath the surface regarding who was actually identified as core to the organization and how employee identification with the core values could be problematic. Contract staff were thus sometimes conjured up as the weaker link within organizational processes as it was assumed that they could be influenced by instrumental considerations and by their own perceptions of inequitable treatment within the organization. Thus, there was a tacit acknowledgement within SPDC that the hard HRM strategies implemented on peripheral staff could be a limiting factor on their ability to identify with the organization. A large number of respondents questioned whether SPDC's use of contract staff was merely part of a cost minimisation strategy and not aimed at achieving any functional flexibility gains. Indeed, SPDC's HR processes were called into question. An illustrative quote below captures the views of these respondents;

"A lot has gone into re-organization. A lot of money, a lot of movement of people, and a lot of uncertainties. But reaping the benefits of those re-organizations? I don't think they reap most of the benefits which they set targets of achieving. A situation where you lay off staff and hire them back as contract staff means it wasn't properly done. The 1998 re-organization, I had a few, virtually all the guys working with me were laid off. Some of them were contracted back

to go and do the job which they were laid off from. In that way, the person gets his benefit of being laid off, and his benefit of working. That way the company wouldn't have achieved what they set out to do" (35 year old, male major projects planner, SG4, 8 yrs in SPDC).

Hence, there was a perception that HR processes were not integrated with wider organizational objectives. Indeed, this perception tended to increase the rift between different cadres of staff. The next section on the strategic HRM context explores further the context within which organizational strategies were developed chiefly aimed at establishing processes which support Shell's new identity and culture.

8.3. EXPLORING THE STRATEGIC HRM CONTEXT

Earlier in Chapter 3, while developing the theoretical framework, it was highlighted that a crucial factor to our understanding of organizational culture and identity was the nature of the relationship between espoused human resource policies and actual practice. As Alvesson and Karreman (2007) observe,

"HRM may "work", not in a techno-rational sense, but in terms of people sometimes using it for the construction of meanings, values and orientations... and develop a positive self-view, partly associated with organizational affiliation" (pg. 721).

The development of human resource strategy and policies within Shell Petroleum Development Company was shaped by a range of economic and socio-political factors. The choices adopted by management reflected critical decisions regarding competition, legitimacy, and work relationships with internal stakeholders and Shells' historic legacy. Some of the major factors are shown in Figure 8.2 below.

As the analysis and discussions continue it would become apparent that all these factors contributed in some degree to the adoption of specific HR practices and processes within SPDC. It may also be argued that the subsequent influence on employee identification and commitment could not have been entirely foreseen during strategy formulation, if this actually occurred. It seems more likely, based on evidence from the field work, that HR strategy was ad hoc, piecemeal and generally reactive to top management pressures to address changes in the organizational context. I will touch upon the various factors in Fig. 8.2 to highlight their importance within the context of SPDC. An overview of some of these

factors may have been provided in earlier chapters but it is important to re-emphasise their relevance in these discussions.

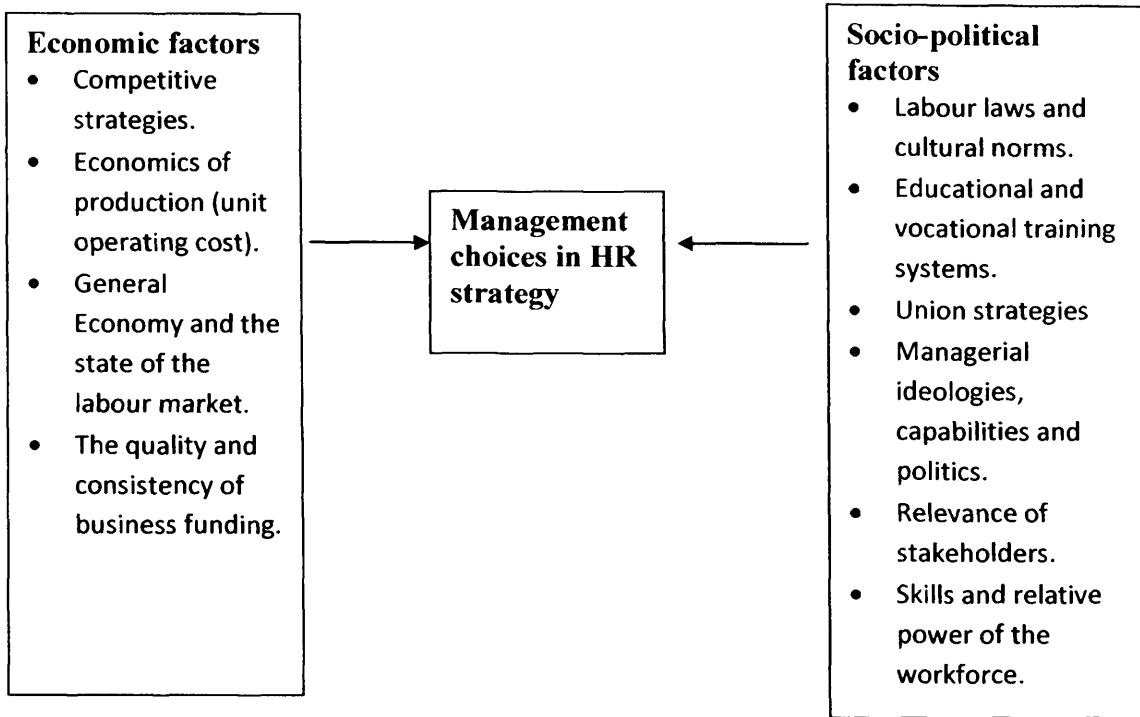


Fig. 8.2. Major context factors affecting management choices in HR Strategy within SPDC.

(Adapted from Boxall and Purcell, 2008)

8.3.1. Economic Factors

The competitive strategies adopted in SPDC were focused on providing the best return on investment (ROI) for its shareholders. In order to achieve this, Shell's management sought to ensure that the company remained competitive as the major technical partner with the Nigerian Government in the joint venture agreement. Due to the nature of the revenue sharing contracts, Shell's margin on profits declined the higher the unit operating costs (UOC) of producing a barrel of crude oil or condensate. To counter this decline in profits, Shell's management aimed to minimise costs in the extraction of oil and gas (Source: Shell archival material and informal chats with a Shell manager). By applying Porter's (1985) influential typology of competitive strategies, it could be argued that Shell focused primarily on a strategy of cost leadership. However, there were also pressures to maintain leadership in

terms of technology usage and the development of innovative products¹⁴. Hence, Shell also sought to adopt a strategy of differentiation through continuous product innovation. Obviously, these two strategies required quite different values and associated behaviours and the implications in terms of supporting HR practices and processes were quite challenging. Schuler and Jackson (1987) suggest that different competitive strategies imply different kinds and blends of employee behaviour. A strategy of differentiation and innovation would demand creative, risk-oriented and cooperative behaviour. To achieve this the company would need to emphasise "...selecting highly skilled individuals, giving employees more discretion, using minimal controls, making greater investment in human resources, providing more resources for experimentation, allowing and even rewarding occasional failure, and appraising performance for its long-run implications" (Schuler and Jackson, 1987:210).

Conversely, where cost leadership is the objective, the HR implications for the average employee were much less attractive. This implied a work design that was repetitive, a reduction in pay and remuneration, a reduction of employee numbers, a decline in working conditions, work intensification and a focus on rewarding short-term results. Within SPDC the strategies used in achieving these contrasting aims were a constant source of tension and had various implications for employee commitment to and motivation by company values and rhetoric.

The two remaining economic factors; the general economy and the shape of the labour market and the quality of funding were inter-related. Oil and Gas revenues accounted for above 90 per cent of foreign exchange earnings and were thus very important to the federal government of Nigeria (see Chapter 6). As part of the joint venture agreements, the government provided about 55 per cent of the funding. Shell argued that the Nigerian governments lack of consistency in fulfilling these obligations had significant impacts on investments and development projects and consequently on human resource practices of recruitment and retention of core staff. Additionally, as a result of lack of development of national educational and vocational institutions, a tight labour market existed for the provision of core technical and specialist staff. Shell Nigeria had to adapt to this context and the process and implications of these adaptations on employee's perceptions of identity and culture will be highlighted in discussions below.

¹⁴ These are identified as key strategic drivers for Shell's long term survival and are detailed on the Shell web site (2011): <http://www.shell.com/home/content/innovation/>

8.3.2. Socio-political factors

As can be seen from Fig. 8.2, all the identified socio-political factors had an influence on what choices major multinationals make in structuring their work organization and employment relations. Nigerian labour laws provided sufficient latitude to major corporations to achieve what was perceived to be their primary function; maintaining and increasing shareholder investments. There was minimum employee protection and this was mostly in the form of employee rights to union membership and the existence of a minimum wage and basic employment conditions. These were exploited quite significantly by large companies such as Shell and other multinationals. Furthermore, the lack of sufficient investment in educational and vocational training institutions posed a challenge to Shell Nigeria in terms of meeting its skilled human resource needs. The organization adopted a variety of strategies to reduce its dependency on a depleted labour market and meet its productivity obligations. These strategies will be explored further in the sections below.

As described earlier on, Shell roughly applied a core and periphery model of work organization (Atkinson, 1985) to bolster functional and numerical flexibility. In order to achieve this, there were concerted efforts to minimise the influence of unions and focus on individualised work contracts (Kessler and Purcell, 1995). At the time of fieldwork, union membership levels within Shell Nigeria had dropped significantly and the perceived ability of unions to affect organizational outcomes was at an all time low.

8.4. HUMAN RESOURCE PRACTICES

During fieldwork, I observed that Shell had a clearly structured and well staffed HR organization, with functional control of key organizational processes such as recruitment, policy administration, welfare, industrial relations and learning and development (See Fig. 8.3 below). HR staff were assigned as staff advisers to the different functional groups and provided specialist HR guidance to line managers in carrying out their duties, especially with regards to training and development

However, it soon became obvious that there were significant inconsistencies in terms of the frames of reference adopted by HR and this consequently had an impact on the relationship between the HR function and the rest of the organization.

During the course of fieldwork, Shell Nigeria was preparing for the first ever Shell people’s week event and I was invited and participated in one of the early planning meetings initiated by the organising committee which was made up of a group of eight relatively young staff. These staff had an average age of 35 years, with the youngest a 30 year old female who had been in Shell for 2 years while the oldest was a 42 year old male who had been in Shell for 10 years. These had been selected from different directorates where they had shown great interest and aptitude for selling the transformation and change narrative. This team was supported by a Shell consultant from the Shell centre in The Hague who joined the meeting via teleconference and reported directly to the HR General Manager. I was allowed to tape the proceedings. However, I assume this agreement was forgotten by the participants as they began to converse very freely and without restraint throughout the rest of the meeting even when sensitive issues were being discussed. I had the feeling I had effectively become a ‘fly on the wall’.

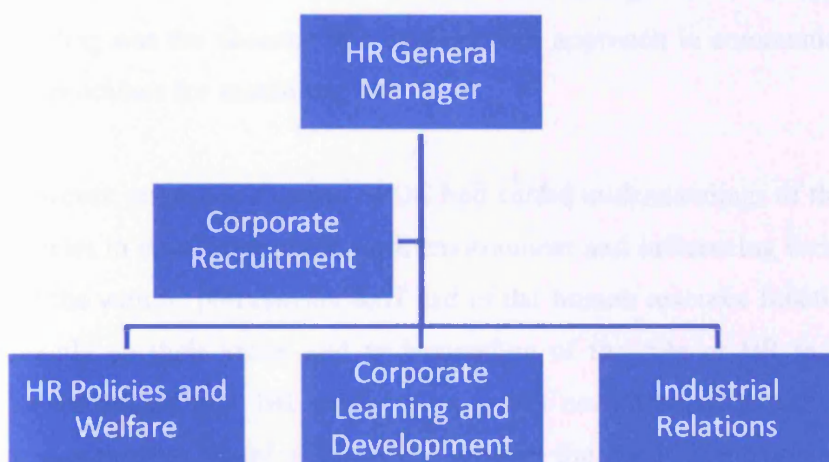


Fig. 8.3 Structure of HR functional areas

A primary aim of the Peoples’ week event was to communicate the Employee Value Proposition (EVP) to all staff. The highlight of the meeting was when the committee member responsible for providing the Employee value proposition indicated that there was no such thing within SPDC. There was widespread confusion, “in this company? Do you mean we do not have an EVP”? Apparently, an EVP within Shell was understood to be a contract between the organization and their staff wherein issues explicitly identified by staff as major concerns have had top management review and commitment to addressing them. This may be

a commitment to provide a minimum of 25 hrs of formal learning in a year or for the provision of crèche facilities for staff with childcare concerns as part of Shells diversity and inclusiveness core values. Apparently, this contract was never signed off. As the committee member reported,

“The story I am left with today is a very sad story. There were studies, there were focus group.. ..all for nothing. It’s very very embarrassing. I had a long meeting with XXXX (head of HR employee relations; name removed to preserve anonymity). Save by crafting one by ourselves, they never got to a landing. The document got to the senior management meeting, they said Ok let’s do 1,2 3 and come up with an EVP for SPDC. And it never ever progressed beyond that. What I have been able to get today is what that project team came up with, the initial list of 8-10 items. But the directors never agreed on what the actual EVP should entail” (Peoples’ week planning committee member).

After the shock followed some anxiety, ‘what do we tell fellow staff?’, they all wondered. Despite the disbelief around the table, participants quickly agreed on a strategy to keep other Shell employees unaware of this development. Employees would be notified that the EVP would be communicated at a later date. What emerged from this interaction in terms of theory building was the absence of a strategic HR approach in communicating the core values and HR processes for sustaining them.

However, employees within SPDC had varied understandings of the role of HR staff and HR policies in structuring their work environment and influencing their careers. In order to tease out the various perceptions staff had of the human resource function, employees were asked directly on their views and understanding of the role of HR in SPDC. Some respondents acknowledged that HR made some useful contributions to the organization and that HR processes were aimed at balancing between the needs of the organization and the aspirations of the individual thus acting as identity managers. As a respondent commented,

“They are a bunch of individuals that try to ensure there is a balance between individual aspiration and the company’s aspiration and needs. So trying to manage that is the work of human resources. Part of the company’s need is to develop their staff in a particular direction and get things done. Part of the individual’s need is to develop them in an area where they are interested in. It could be conflicting. HR is there to provide a balance amongst these conflicting needs” (38 years old, male senior petrophysicist, SG3, 11 years in SPDC).

More significantly, a larger proportion of the respondents viewed HR quite negatively, perceiving them as secretive and distant from the employees they were supposed to assist

within the organization. A couple of illustrative quotes are provided below to highlight this perception;

"I get the impression that they are very dodgy people. They are the kind of people that just look at you and say 'you are finished in this company'. That the impression I get.. That's my own perception that they are far removed from the people they are supposed to provide services to" (41 years old male surveyor, SG4, 11 years in SPDC).

Similarly, another interviewee remarked,

"Yeah we rarely see the HR adviser, maybe it's not the shortcoming of the HR, and maybe it's just that we don't get along or we don't need to meet him. Or because I guess, for the normal people, they are too far away from us...you only see them once a year in April when they come around with the manager to give you that brochure. One would have expected that HR advisers would occasionally try to meet their clients; because we are their major clients, go from room to room, to know what their problems are without waiting for this once a year meeting. When you generally see them is when there's a new process to be deployed in HR, they come and make a presentation. You also get the impression that they're also very evasive before you ask any questions. That's the impression I get" (44 years old, male project account coordinator, SG3, 12 years in SPDC).

Implicit in these observations was recognition of the power HR had within the organization both through their position and through the access they had to privileged information on members of staff. This recognition flew in the face of the proposition on the Shell Nigeria website and organizational correspondence that HR enables employees to reach their full potential within the organization. For most respondents their impact was the reverse, and they were perceived to hinder, limit and complicate careers through a secretive culture of command and control. This was an interesting observation when this was placed alongside the description of Human Resources as an enabler of a flexible workplace on the Shell website and other organizational literature. It also provided evidence that where organizational strategy does not clarify how HR aligns with its vision, the interpretation and implementation of such strategies could vary significantly from the viewpoints of HR and the employees. The subsequent sections now explore how the different HR units implemented HR policies or procedures. They further examine the impact of these processes on employees' understanding and perception of identification processes within Shell.

8.4.1. Recruitment and Selection

Within SPDC recruitment was centrally coordinated and aimed to fill skills gaps within the organization. A variety of options were utilised to obtain quality staff. One option which is used across the Shell group is the Gourami Business Challenge. This global programme is

designed for final year university students and presents a unique blend of a developmental programme, organizational socialisation and potential recruitment board. This Business challenge offers a 5 day residential event where participants can become immersed in a fictional country; Gourami. Within Nigeria, Shell used this programme to showcase its opportunities, introduce potential employees to its organizational culture and business principles, and screen for recruits with the right skills and attitudes to contribute successfully to Shell's organizational objectives and growth. However, of the limited number of successful participants, these are required by Nigerian employment law to complete the mandatory one year National Youth Service programme before returning to Shell to take up job positions. In reality, this year-long programme presented a risk to the organizations recruitment planning as successful recruits did not always return to Shell but may take up similar positions with Shell competitors such as Mobil or Chevron.

In terms of recruitment strategy it could be argued that SPDC's strategy had evolved to address local and specific challenges. These challenges included the need to gain access to a highly qualified cadre of local staff, the need to address the employment demands of their host communities, the need to improve its sustainable development and social responsibility image and the need to maintain some functional and numerical flexibility. In so doing, SPDC resorted to a variety of measures to improve its pool of local labour resources prior to recruitment. This included a university scholarships scheme and closer links with key Nigerian Universities through internships and sabbaticals. It also included the development of an innovative programme, the Shell Intensive Training Programme (SITP) in partnership with Robert Gordon University, Aberdeen. This programme was targeted at graduates of Nigeria universities and polytechnics and was aimed at improving technical know-how and people management skills within the labour pool. This aimed to address Shell's need for both technical specialist/middle managers and fully competent field operatives. The recruitment exercise into these programmes was deemed sufficiently rigorous to absorb only the best graduates.

This programme comprised of two distinct phases; the SITP/1 for university graduates in specialist disciplines like Engineering, Chemistry or IT, and the SITP/2 programme which aimed to employ technical skilled polytechnic graduates for field operations. The flagship of this programme was the SITP/1 and the programme involved a 2 year residential programme to ensure that potentially employable staff were identified at the end of the process. This

programme was aimed at remedying the perceived structural gaps in Nigeria's educational system and to replace large-scale recruitment drives based on psychometric testing. Additionally, mature graduates were employed from other companies where appropriate.

The Head of the resourcing and recruitment function indicated that Shell was exploring a range of options to meet these challenges. He commented that,

“Shell aims to recruit the best and the brightest in the market because we strive to be the employer of first choice. Where the skills and competencies are not available in the market, we may put what is available through the SITP programme or seek out more mature recruits either within Nigeria or outside. We run recruitment fairs overseas when required and our recruitment website is accessible to any skilled applicants. Additionally, Shell is famous for developing staff laterally, so we can fill in some vacancies internally” (41 years old, male Shell recruitment manager, SG3, 14 years in SPDC).

This quote highlighted Shell's strategic focus in fostering and sustaining an elite identity through its recruitment practices. The statement was obtained in an impromptu manner during lunch when I accompanied a senior manager to lunch. The managers decided to share a table and I was privy to their discussions. When the purpose of my stay in Shell was highlighted, he provided the comment quoted above.

For some respondents, there was a perception that the recruitment process involved more than the selection of new recruits based on just their intellectual skills. Ensuring a fairly high organization-recruit fit at the level of values and attitudes was considered one of the strategic purposes of the HR process. To illustrate this point, a couple of quotes are provided below:

“Yes. Yes. In terms of recruitment it's a bit of HR process that works. I can say that the method that they use in recruiting seems to have worked. Anybody who is qualified should come and try. You pass a set of exams then we come and talk to you and see if you have the set of values we're looking for. That seems to have worked very well and that is changing as well. It now involves going through the process of, eh, two year schooling. They get in some guys, send them through the examination, and then send them through an intensive course of two years. But in terms of getting people with certain values, I think to a large extent, they've been successful in getting that. There are only been a few cases of poor integrity in the company. Very few of them and those have been dealt with” (39 years old, male IT line manager, SG4, 11 yrs in SPDC).

Here the line manager suggested that there were definite elements of the recruitment process which conferred wide ranging organizational benefits in terms of ensuring that there was a fit between the organizational values and the selected recruits thereby promoting desired

behaviours and enhancing organizational identification. Another interviewee concurred with this view and noted that,

“Um, my thinking yes, is maybe it’s from the recruitment process that we tend to get some people with integrity in the first case. So what the company makes them imbibe, the level of integrity they get, um, working for the company may not necessarily mean what they are exhibiting was not there in the first place. My gut feeling is that it’s mostly due to the recruitment process where the process tends to get people they feel have some integrity. And for the fact that, compared to the society where they operate, em, they (Shell) still have some certain element of, um, consequence management. If people misbehave in the work place they are fired. So that sort of weeds out the bad ones and keeps the good ones and then um there is just a little bit of the company making people imbibe integrity, honesty in their dealings. There is a little bit of this and I believe majority comes through the process of bringing in people. The people that are recruited are not really the worst ones which the company generally tends to “flush out” over the years. I think they try to get the best they can, and then um, give them a little push and then they could just be above the average in the society” (37 years old, female corporate HSE adviser, SG5, 6 years in SPDC).

Hence, a combination of finding recruits who were ‘above the average in the society’ in terms of their level of integrity and a process of consequence management within SPDC were seen to be responsible for developing SPDC staff who were more likely to adopt and practice Shell’s organizational values (at least in the workplace).

8.4.2. Organizational Training and Development

Within SPDC and the Shell group in general, training and development were promoted as essential ingredients in implementing the ‘helicopter model’¹⁵ of organizational development (see Shell corporate website: www.Shell.com). Some interviewees suggest that this is an accepted constituent of Shell’s identity and manifests in identifiable behaviours by staff. To confirm this view, a respondent observed,

“SPDC places a high premium on welfare and developing the employee. Hence, anywhere they go, SPDC staff are seen to be confident bordering on arrogance. There is no other oil company in Nigeria where you would find a young reservoir engineer making a presentation to top government stakeholders on behalf of the organization. Elf or Mobil would definitely not do so. They would have a top manager making that presentation” (34 years old, male petrophysicist, SG5, 5 years in SPDC).

¹⁵ This was a staff development approach whereby employees with a high potential were encouraged to gain experience within different departments and functions in order to have a proper overview of Shell’s business portfolios.

“Yeah, a lot of positive things. Because I’ll tell you one thing about the organization, compared to the stories I hear about other companies, this is one company that allows you, if you want, to move around. From HR, to external relations, so a lot of mobility. That’s one thing that is positive; people are allowed to move, subject to certain limits, to aspire to whatever they want to do. So there are a lot of positive things about this company, so people should be fair. It could be worse, honestly” (41 years old male surveyor, SG4, 11 years in SPDC).

It was widely acknowledged that staff, recognised to have top management potential, were encouraged to have a wide exposure to the different segments of the business. The training began in some instances before staff joined the organization as was illustrated earlier during the discussion on the SITP recruitment programme. For staff within the organization, learning advisors liaised with skills managers to identify a skills wish list for their departments. This process adopted a bottoms-up approach, where individual staff were encouraged to submit a list of four courses that met their annual work and individual development objectives. These were then prioritized based on available budget and the needs of the organization. Within SPDC, to ensure a greater access to training and development, the Edjeba learning village (ELV) was completed in 2002 to serve as a learning hub for the African sub-region. This facility allows the organization to provide training both to its staff and to the oil and gas industry in general. Staff generally perceived this focus on learning and development to be one of the key aspects of Shell’s identity. However, it was also acknowledged that access to training and development also reflected the differences in status and hierarchy within the organization.

A large body of literature has focused on socialization within organizations and how these aid staff identification with the organization. One of the most theoretically developed models of socialization by Van Maanen and Schien’s (1979) proposes a typology of socialization tactics. For the purposes of this study, attempts to structure the work experience of employees through the use of a mentoring scheme was particularly relevant. Within SPDC, a mentoring scheme was used to communicate the organizational values, cultural norms and practices to

new employees and also act as role model with whom employees could identify. This was referred to as the 'buddy system'. When respondents were questioned about its effectiveness, there were a range of responses as the following sample illustrates,

"I prefer the informal process. It's more my style but the difficulty is that initially you don't know the right questions to ask. Everyone is so helpful and once you ask the right questions they open up to you" (49 years old, female expatriate staff, SG4, 2 years in SPDC).

Another respondent also indicated that the informal process of mentoring had been beneficial to her development. She commented,

"Informal. I have two good friends in IT, senior people. Every time I gripe about Shell and I want to leave, they always tell me the values, the things that are good about this company, I've been to the engagement sessions but it really doesn't touch me the same way as the knowing someone who has gone ahead of me, faced the challenges and overcome them. This encourages me to identify more with Shell" (30 years old, female IT staff, SG6, 3 years in SPDC).

Within SPDC, new employees were encouraged to have a mentor. Sometimes HR facilitated the introductions but for the majority of cases employees were left to engage a mentor with whom they felt comfortable. These mentors were regarded as organizational prototypes and a guide on how best to succeed in the organization. Indeed, it became obvious that some employees used their mentors as a barometer to measure their identification with the organization. A large number of respondents expressed great dismay and anxiety when it was announced that a popular Shell manager who was a mentor to a large number of staff was leaving Shell voluntarily. One respondent argued,

"He must have seen something wrong about this change that bothered him. He is one of the people who would tell management honestly how he feels if things are going wrong. I hear something like that happened and he decided to leave. It's almost like rats leaving a sinking ship. I would leave as well only I haven't the same options as he has" (35 years old, female production technologist, 8 years in SPDC).

Similarly, another irate respondent observed,

"All this bullxxxx about our staff being our greatest asset and 'people first' is just more HR talk and no substance. He was the best seismic interpreter in the country, has won awards all over the world and they let him go? Morale will be very low for a long time because he has been an inspiration to the entire sub-surface discipline and all the new staff almost worship him" (34 years old, male petrophysicist, SG5, 5 yrs in SPDC).

Hence, for some staff, management of the mentoring process by HR was symptomatic of the failure of other initiatives within the organization. Previous research has indicated that mentors are perceived by employees to represent the organization and in identifying with the mentor, employees were actually identifying with the organization. Two reasons were suggested for this effect. Firstly, mentors were high up in the hierarchy and represented employee's aspirations of how to progress and be successful within the organization, and secondly, there was seen to be some top management formal endorsement of the 'buddy' or mentorship scheme (See Raabe and Beehr, 2003 for a discussion). In the case of SPDC, a lack of HR awareness or sensitivity to this link between mentoring and organizational identification, negated some of the benefits that could be gained from this process both for socialization and identification purposes.

The organization also sought to maintain its identity through its membership of professional organizations such as the Society of Petroleum Engineers. Staff within the relevant functional disciplines were encouraged to become members once they joined the organization. Indeed, there was significant peer pressure to achieve membership as this confers a heightened identity as a core professional within the industry. Membership was informally coordinated by the Discipline or skills managers for the particular functional grouping (Source: 41 years old, male Senior petrophysicist/ Discipline leader, SG3, 11 years in SPDC). In 2009 for example, Shell won Best Exhibitor out of 35 exhibitors while several staff won individual awards and a number of other winners were Shell alumni. The keynote address was presented by the Shell Nigeria Managing Director (Source: Shell Nigeria website 2009). These events were attended by dignitaries such as the Minister for Petroleum Resources and served to communicate the organization's expertise to a range of stakeholders.

8.4.3. HR policies and Welfare – organizational challenges

The lack of strategic focus which was conveyed to HR Staff (reference the lack of an EVP at the beginning of the section) within SPDC might thus translate into the way they carry out their roles; sometimes placing emphasis on discrete tasks but not appreciating their strategic import. An example presented by respondents of short term benefits overriding long term HR strategy concerns was the restructuring of Shell Nigeria catering services due to perceived cost benefits. This review was undertaken despite the incalculable benefits this welfare service brought to the organization by demonstrating a shared and privileged community, a

sense of entitlement and exclusivity for members which fostered and sustained an elite identity.

To establish the context of this observation, it is relevant to recognise that Shell Nigeria had traditionally provided canteen services at all its locations. All Shell staff and on-site contractors were entitled to free meals at these canteens; lunch for day workers and the full daily meal complement for staff on off-site locations. From personal experience, I can comment that the food was considered of reasonable quality. Following an internal review, Shell management indicated that the cost of subsidising the canteens was too high and the welfare department were encouraged to consider alternatives (Source: 56 years old, Male Shell Manager, SG1, 24 years in SPDC). The outcome of this exercise was the suggestion to trial a scheme whereby employees were paid a significant amount to go elsewhere to obtain their lunch. At the time of the interview, a meal in a local Nigerian restaurant cost between 300 – 500 Naira whereas the company offered to pay staff 1,000 Naira to obtain their lunch. Initially, there was very little complaint from staff as they considered this an opportunity to earn additional revenue, while subverting managerial control.

Prior to the onset of this scheme, lunch time at the canteen was between 11:30am and 2pm, and employees were expected to take a half hour – 1 hour break. Under the current arrangements, lunch took as long as the employees indicated it did. Various excuses were presented to justify a long lunch break away from the office. These included traffic hold-ups, the absence of suitable eating facilities closer to the office and even road traffic accidents. As these excuses could rarely be verified, addressing the increased tardiness at work defied management control.

Shell employees exploited this gap in organizational control to their advantage. A respondent admitted that she had a sandwich at work but used the long break to address childcare concerns,

“Well, I won't say this is the best for the organization but these new arrangements favour me. I have a quick sandwich at work and I can use the lunch break to pick my kids from school. I know a lot of my friends do this as well. I can also respond to family emergencies without fear of getting into serious trouble. Last month, my boy was unwell at school, I just said I was off for lunch and had enough time to get him to hospital, receive some treatment and get him home before returning to work” (32 years old, female production geologist, SG4, 6 years in SPDC).

Another indicated that these new arrangements provided significant cost saving and was quite convenient,

"I previously had to employ a part-time driver to pick my kids from school as I couldn't do this myself. This opportunity allows my to do the school run myself and I even assist a friend when she can't make it to the school" (36 years old, female business support staff, SG7, 2 years in SPDC).

The above frank responses indicated that some employees perceived this as an opportunity to address caring concerns. It is possible that while other employees were reluctant to admit on tape during the interviews what may be considered minor misdemeanours, I was informed that some employees used the opportunity to attend to urgent business and social engagements. It is important to point out that the respondents above felt certain that their responses would be treated confidentially. A high level of trust existed from my previous relationships with the respondents while working for Shell a few years previously.

Though the provision of payment to staff for the self-provision of lunch continued after I had completed field work, some staff began raising concerns about the implications these arrangements had for organizational work processes and the public image of Shell. One respondent observed,

"Just look at how staff take lunch. I don't think it tells well on the reputation of the company. People just filter all over the place and people disappear by 11:30am because they have to go for lunch. So, I think it's an error- enforcing condition so to say because you've got to go out. Well, maybe today I go out to somewhere near to the office and tomorrow I decide I don't like it again and I go somewhere far away and because I've got to beat the traffic, I've got to go early enough so I leave by 11:30am and come in about 2pm or so. I don't think it's something very sound for a company like this" (38 years old, Male senior project engineer, SG4, 6 years with SPDC).

Considering the many apparent contradictions in strategy and outcomes, it seems possible to agree, as the expatriate member of staff observed in the previous chapter, that Shell does display aspects of a schizophrenic identity. The removal of benefits and privileges to which staff felt entitled was considered an erosion of a psychological contract and undermined the elite identity Shell was trying to create and sustain. Human resource policies and practices were not perceived as sending out consistent messages and sometime, where cost-savings was considered more important, actually sent out counter messages. All these occurred while

other companies which competed within the same environment were still maintaining the same level of welfare services for their staff.

Many employees suggested that the inconsistencies in HR practices were merely reflective of the unremitting agenda for change within SPDC. It was argued that before a change programme was completed and benefits begin to accrue, the project was abandoned and a new one started. An interviewee illustrated this by highlighting a range of projects which he could immediately recall which had yielded no outcomes,

“I think a lot of the HR processes are more talk less work. There’s a lot of talking, but we are not seeing most of the action. You know, the talking translated into activities. I can see that they set for themselves a target of achieving certain things but in the end I don’t see those things being achieved. Some of them um they talked up what do you call it, “paperless office” which I heard of when I joined the company and then I moved to Port-Harcourt and nobody remembers it. The benefit wasn’t achieved. The paperless office wasn’t achieved and I don’t know if there was any reduction in the use of papers. And that’s no more remembered. There was a debate on centralisation. The benefit of centralisation, I don’t think there actually is one. So there is a lot of talking that we want to concentrate people in several areas. That will reduce trouble, which will reduce this, that will reduce that. I don’t see that being achieved because the fields are scattered and it needs people to go to the field. So moving someone that is supposed to be based in the field to the office does not help. Their reason is that there is trouble. Concentration of the office staff helps. Ok, if you move people who are based in the office into the single office, it’s supposed to reduce moving around offices to have meetings. But the infrastructure which has been built to support them is still in existence. So unless they are sold off, that’s when they’ll get benefits of the centralisation of people in the offices. I can continue on and on about so many policies. There is so much talk about, but the benefit doesn’t seem to match the talk” (39 years old, male senior process engineer, SG4, 14 years in SPDC).

Within this context, employees indicated that with the existing lack of credibility of HR policies and procedures there was no longer any trust or belief that HR could function on their behalf. HR was thus widely perceived to be a tool of managers over the staff.

8.4.4. Employee relations- the hard or soft approach

Shell Nigeria recognises two unions for collective representation. NUPENG – National Union of Petroleum and Natural Gas workers association, to represent operational level staff and PANGASSEN – Petroleum and Gas Senior Staff Association of Nigeria for supervisory and middle management roles. However, it is important to note that Shell restricts membership in the senior staff union to employees who are within salary group band 4-8

(SG4- SG8). Any staff above the SG4 grade was considered part of shell management and was forbidden from union activities. Shell has traditionally operated individual contracts of employment and downplayed the influence and importance of the unions. As I mentioned earlier during the discussion on the organizational context, employees perceived the union to have limited impact within Shell but more likely to influence outcomes across the entire industry. For example, the unions have only recently urged the Nigerian government to pass into law a petroleum industry bill which is aimed at guaranteeing the future of Nigerian oil industry workers in line with global best practice. It was anticipated this bill may be passed by May 2011. However, Shell is not without some influence at the highest levels of government and lobbies actively to protect its interests. To underline this influence, several Ministers of Petroleum Resources in Nigeria have been ex-Shell staff. Indeed, the current Minister of Petroleum Resources was a Shell staff at the time of my field interviews. The latest information from the Nigerian media is that progress on the bill has stalled for a variety of reasons. Thus, oil industry commentators observe this is another milestone missed. (Source:<http://www.thenigeriandaily.com/2011/06/14/nigeria-belaboured-petroleum-industry-bill/>).

Employees interviewed during the fieldwork suggested that Shell had swayed precariously between hard and soft management approaches (Tyson, 1995) or what has been termed high and low commitment ones (Legge, 1995; Watson, 2004). From a rigid, paternalistic and hierarchical organization, Shell Nigeria introduced open plan offices, encouraged employees to address each other by their first names and indulged in team building events supposedly with the aim of empowering employees and enhancing their performance. However, employees remained confused and sceptical regarding Shell's ultimate objective, especially as the latest transformation process was focused on achieving more with less. This effectively meant less emphasis on the softer elements of HR strategy such as team building/socializing and a greater focus on bringing down the unit operating cost of oil through a more exploitative interaction with the organization's human resources. Additionally, the packaging of the transformation programme with a significant restructuring exercise within the organization contributed to employees' sense of disenchantment with the narrative and discourse of change.

It has been highlighted in previous research that management is not a homogenous entity which acts uniformly to advance capitalist interest (Mintzberg, 1973). It is theorised that

contemporary management is enmeshed in contradictory power relations, involving shifting alliances and objectives which may or may not be in consonance with the firms overall goals. The links between organizational structure and cultural change are reflected in research which highlights how organizational rationalisation might undermine support for culture or identity change initiatives (Ogbonna and Harris, 1998).

In SPDC, middle managers considered themselves easy targets even before the last restructuring exercise. Most were aware of a key presentation by a senior Shell director from the Hague two years previously, when he observed that he was struck by what he considered the 'bulge'¹⁶ in SPDC hierarchy and organizational structure and recommended that remedial action be taken. By the 'bulge' he referred to what he considered a disproportionate representation of middle managers and supervisors within the organization. The observation above is consistent with research which suggests that when organizational restructuring is focused on de-layering, middle managers bear the brunt of the resulting insecurity. This is despite the crucial function they were expected to perform both as role models and also in translating the intent and thrust of culture and identity change initiatives for their subordinates. Previous work has identified non-monetizable factors which help establish and maintain a long-term relationship between employees and the organization. These suggest that long-term employment and job security may foster feelings of loyalty and psychological attachment (Rosseau, 2000) thereby promoting greater organizational identification.

Thus, in seeking to become more efficient and flexible through frequent change initiatives, Shell introduced some new elements to the workplace; uncertainty and workplace stress. Employees who had come into Shell on the implicit understanding that this was a job for life now had the company telling them otherwise. Older respondents, who were invariably middle managers, indicated that when they joined it was a popular joke that 'a Shell man never retires, he merely fades away'. They commented that a Shell staff was now like every other employee in the wider Nigerian labour market, where there were no employment guarantees and employees were consumed by stress, anxiety and uncertainty. The only difference was that they (Shell staff) received a generous severance package when they were encouraged to leave. A respondent lamented the decline of the 'Shell man' and suggested that employment

¹⁶ Middle managers in Shell are considered to be staff between SG3 and SG5. See Appendix 3.

flexibility was a foreign concept which encouraged alienation and dis-identification of staff from the organization. When asked if he considered himself a stakeholder in Shell, he replied,

“Stakeholder is a nice word. It means you are a part owner of the company. It means you are part owner of the activities. Yes, to a little extent. Um, there used to be the concept of SHELL (emphasis by respondent) man. Man is SHELL. The SHELL is in the man but that has changed a lot. The policies have changed. You are employable in so far as you perform, which has necessitated, eh, regular layoffs and that has increased insecurity and that then reduces the stake which staff think they have in the company. Striving all your life to make sure that everything works the way that they should work, has reduced. People do not do it the way they used to do it before. Before, they held it (the organization) dear. They knew that while they are here they have employment for life. So, they had better keep it. In order to get the best achievement out of people, they’ve changed it to use processes which I think is meant for other cultures in this country. In other cultures where there is fluidity of jobs, people hop jobs, move around and then laying off is used as a means of getting people to perform, em you know, and it has been transported here. But in our economy, where laying off is almost a death warrant if you don’t have any other means of sustaining yourself, it has tended to have a negative effect. It has tended to make people have less security outside their employment. That tends to reduce the fact that they are stakeholders. Let me go back to the question of stakeholders. So they try to get a stake somewhere else. It’s mostly caused by the fact that the person knows that he’s no longer what he used to be. He is no longer the SHELL man he used to be. The previous way has advantages for the company, it has advantages for the staff. Identifying with the company you work with, and being proud of the company you work in, has a big advantage to the company which they cannot quantify” (42 years old, male principal front end engineer, SG3, 16 years in SPDC).

At the time of the field interviews, respondents suggested that the frequency of major transformations or change in SPDC was at least once every four years. With each change was a new batch of ‘voluntary’ redundancies. Several interviewees highlighted this as an issue which made staff question their membership and identification with the organization and was a great source of distress. The remarks of the respondent below illustrates this view,

“The Shell voluntary selective severance programme was one event that till today still makes me very uncomfortable in the organization. In the sense that if you say that it is a voluntary severance, then if you have severed someone and the person does not want to go, then you should probably retain the person. But I didn’t see this happening in the 1999 severance programme and till today it still hurts me. But well, because it is an organization and the organization has leaders and they say that it’s good for the organization, I have to abide by it. The SOFu programme was another programme that really turned me upside down because I felt that if you are removing staff, then you have to position yourself before you go into the market for recruitment. You don’t take away people and at the same time be taking in people. I feel there must be a balance between these two. If you are removing staff then you must be positive that you can work with what is left. Not necessarily because I want to move this person because he is no more good, no more productive and then you take in someone who is a greenhorn and who you hope would be more productive than that person” (40 years old, male BIM –Subsurface portfolio team leader, SG3, 14 years in SPDC).

Thus there were significant concerns from Shell employees that they were growing ever more distant from the organization's aspirations. In seeking to address core business survival concerns Shell was seemingly weakening the psychological and emotional bonds which maintained employee identification with the organization.

8.5 COMMUNICATIONS WITH SHELL'S STAKEHOLDERS

As mentioned in the introduction, Shell's relationships with its stakeholders may usefully be split into two distinct segments for analytical purposes. How Shell communicated with internal and external stakeholders was recognised to be different in many regards and sometimes reflected the salience and importance of each grouping to their long term strategy. The sections below will reflect on employee's perceptions of these communication patterns, their effects in engendering a form of organizational identity or in providing mechanisms of individual identity defence in response to organizational and individual identity threats.

8.5.1. Communicating to internal stakeholders

During the interviews, respondents suggested that the patterns and purposes of communicating the organization's values and identity to internal stakeholders (employees) were sometimes similar but much more detailed than external communications. Furthermore, as employees had a greater involvement in organizational processes and their knowledge was thus much more extensive; communications targeted at employees were focused on identity maintenance and ensuring consistency both within the organization and in the interaction of employees with other stakeholders. In confirming this perception, a respondent observed,

"I think internal communication has been more effective than external. Internal communication is handled by all sorts of people, by line managers, by team leaders; a proper process has been established. Emm, for external communication you have an external relations team that is supposed to look outside SPDC and manage communication with government, communication with communities, communication with partners and competitors and all that so that's a different team eh and with different strategies generally" (35 year old, female production technologist, SG4, 8 years in SPDC).

Furthermore, several respondents highlighted the importance of increased awareness of organizational issues. They suggested that this provided an armoury of responses which were

critical in justifying organizational actions and providing a defence for its identity and culture. This response illustrates this point,

“I think. I believe so. The fact that we get to know where the company stands on issues, we have access to some level of information which we should, it helps you in keeping your integrity. It helps you in responding to attacks from other people in the community, in the society. If we do not have access to that information, that would have been a problem. There would have been a problem responding and of course, there would be a problem claiming a level of integrity where you can't support it with facts. I think that's how Shell core values are maintained” (42 years old, male senior drilling engineer, SG3, 11 years in SPDC).

The pattern of organizational internal communication was judged to be dynamic, involving a useful feedback mechanism whereby top managers were aware of employee concerns. This normally occurs during management question and answer sessions, the MD road shows as described by the following respondent,

“Internally, emm internally to a large extent because at least when you have a presentation emm, you have a free question and answer session and that's usually a referral feedback mechanism. The M.D has a road show and people ask all sorts of foolish questions which he normally has to answer, so that's usually good. Before the advent of this government in SPDC we used to have what we called the “Tell SHELL forum” which was just a forum where people go anonymously and say whatever they want to say. And eh, that was also a very good feedback mechanism, even though a few people have (ab)used it, to the extent that when the new M.D came in, he didn't want that to continue. He wanted the people to identify themselves and contribute their feedback. Which I think is still ok because if you're sure of what you're saying, instead spreading rumours you should feel bold enough to identify yourself and say it. So internally yes, the feedback mechanisms are there. Emm externally it's difficult to implement, we have the stakeholders engagement forum but again it's a limited audience and eh, we do have a website, we have a “Tell SHELL forum” internationally, externally, which people can also connect to and feedback some information to the company but I don't know how efficient it is. I emm, am not really privy to what's been done with the information or the kind of information they get out of that zone, so that you don't know how it operates externally honestly” (36 years old, female production geologist, SG4, 6 years in SPDC).

In the previous chapter there was a discussion of the changes in the format of the Tell Shell on-line form, whereby employees needed to log in and identify themselves before providing constructive feedback. Although, this was acknowledged to create some barriers for staff lacking in confidence or whose feedback was not considered relevant, there was also recognition among employees that constructive feedback may be appreciated. As this respondent points out,

“If you give a constructive feedback yeah sure, it’s usually appreciated. So I think staffs are encouraged. If you really have good feedback, positive feedback, and eh you want to give to the management, it’s encouraged. And eh, the directors even go a step further in the sense that they get one-on-one sessions with staff. I think that was last month, I had a one hour session with the technical director who is a very highly placed person, directly next to the M.D. I went out very openly and from our discussion I think he encouraged me to give all sorts of feedbacks and one of those I gave was the office structure post in the new organization and I was happy to note that during the FDM which is the Shell...SLM which is the Shell leadership meeting, where the directors meet the MD, it came up very strongly and they agreed they were going to do something about it” (35 year old, female business improvement advisor, SG3, 11 years in SPDC).

Thus, many employees seemed to agree that there were sufficient media for communicating Shell’s values, processes and issues to its internal stakeholders.

8.5.2. Communicating with external stakeholders

Shell employees indicated that Shell had made significant progress in terms of how it communicated with its external stakeholder, possibly as a reaction to a perception of their increased salience and importance. Shell management were acutely aware that the government regulatory agencies could affect organizational functioning through restriction on their licence to operate. More significantly, Shell was concerned by the increased militancy of host communities and sought to engage them more proactively. This was a significant departure from previous patterns of community engagement and signalled an attempt by Shell to address identity issues.

However, some staff still attributed the continuing bad public image or perception of Shell by the community stakeholders to a lack of adequate and targeted external communication. SPDC was critiqued by employees for its traditional attitudes of avoidance who argued for a more engaged approach to enable SPDC counter negative claims and publicity more actively and possibly more aggressively. As this respondent observed,

“I think we’re trying but we’re not doing enough. That is why you still see what I call “wrong perception” of the company. That is why people still wake up in the morning, I know there’s been a bad past. they come and block the gate and things like that” (44 years old, male senior process engineer, SG4, 6 years in SPDC).

Other interviewees were slightly more positive about the organization’s communications and suggested that they were becoming more effective. An interviewee opined,

“I think they are. I think they are quite effective in that. They’ve been having a few image battering in recent times. But there is a conscious effort to clear that. There are some special people who respond to issues that are on the news. Um, updating the staff and releasing press statements. I think they are quite effective in doing that because if they haven’t been there would have been a lasting impression – bad impression. But each time there is such bad impression, they are quickly cleared and a barrage of information released. I think the fact that they have tried to be transparent in their dealings has helped. So the communications are well received when they are released. And for the fact that they employ most of the technologies available in communicating erm, it tends to be quite effective” (35 years old, female business improvement advisor, SG3, 11 years in SPDC).

Similarly, another respondent indicated that by actively responding to public accusations, Shell was engaging detractors in the public domain before these issues become identity threats. He remarked that he had tried to monitor Shell’s external publication to keep abreast of issues where Shell provided responses,

“Yeah, some of them. If I look at what I’ve seen in publications generally, there’ve been times we’ve been accused of one thing or the other and the guys in charge of that here would write a kind of disclaimer. Publishing this also goes a long way in trying to better, what I would say is an already battered image. But then you can only do so much, it depends on who reads it and what the person understands. For me, from the inside, I think they’re trying” (29 years old, male trainee telecoms engineer, SG7, 1 year in SPDC).

Although, there was an acknowledgement that there were benefits accruing from these processes of external image management, it was also questioned if these had any lasting impact on the organizations identity claims.

8.6. THE APPROPRIATION OF THE DIVERSITY NARRATIVE

Shell has been variously described by respondents as possessing ‘a military culture’ or ‘an engineering identity’. Within both these contexts, gender was silent even though male domination was accepted as the norm (Ward and Winstanley, 2003). To further complicate the gender dimension, the wider African cultural view advocates that there is work for men and a different category of work for women, linked to caring and welfare. This has led to an entrenchment of men within the technical and engineering disciplines through educational and institutional frameworks. Hence, progression up the hierarchy for women, especially within Shell Nigeria, has been typically slow. As recent as 2000-2002, there were only a 2 women in Shell Nigeria who had attained the Salary Group 2 (see Appendix 3 for Shell salary

structure), and thus there were none within the top management group. Within the last 5-7 years, the concepts of diversity and inclusiveness which are claimed to be one of Shell's core values have been appropriated as narratives of empowerment for females within Shell Nigeria.

Indeed, during the course of the research, definitions of diversity and meanings attached to it varied significantly depending on the viewpoint of the respondent. Male employees argued that diversity meant appreciating the diverse contributions which various members of the organization brought to the table without favouring one group over the other. Most of the female employees mentioned the importance of diverse contributions but added the desire for women to use this as a forum to gain some recognition and status within the organization. As such, diversity initiatives were perceived as a significant resource for constructing and stabilising their identity within the organization. These findings are consistent with Thomas and Davies (2002) whose work on the police concluded that,

“Female police officers and civilians were also seen to be drawing on a ‘cultural script of femininity’ to reflect critically and critique the highly masculinist subject positions they were being offered” (Thomas and Davies, 2002:188).

However, unlike the more progressive construction of feminine identity projected by Thomas and Davies (2002), the notion of gender in my study was more constrained by traditional African cultural stereotypes of what it was meant to be a woman and how this relates to a professional career. Hence, the diversity discourse was both a powerful tool for empowerment and also an arena for contestation. It highlighted the above observation that employees utilise their discretion to dip into the organizational core values to select identity themes which were relevant to their circumstances and which provided opportunities for both ego defence and enhancement. Furthermore, it was interesting to note that the organization was not forthcoming in favouring one interpretation over the other and allowed the various stakeholders engaged in this discussion to indulge in sense-making activities within some broadly defined parameters.

Indeed, the Managing Director and Country Chair of Shell Nigeria at the time of the interview, Basil Omiyi, provided significant support for an affirmative action strategy when he commented in his presentation video introducing the 2005 Peoples week event that the primary focus was,

“Actually attracting the best people for our company and retaining the very good people we currently have. I think that’s important and we are looking at those issues very seriously. In terms of attraction, adjusting our demographics which is skewed at the moment. If you look at number of females in our company and if you imagine that we are all equally endowed both in terms of intellect and capacity. we are currently short-changing ourselves in terms of attraction of a huge population of very competent women out there who can make a great difference to our company. So that for me is going to be one of the focus of our attraction” (Basil Omiyi, Shell MD, 2005).

During cultural change processes, focus on values can lead to identity nostalgia which may be beneficial as it allows organizational members to validate their new understandings through cultural symbols and artefacts (McCabe, 2010). However, where this is not channelled properly through adequate communication, these feelings of identity nostalgia may lead to significant resistance to any identity modifications as these would be perceived to be unnecessary and counter to established cultural practices. Within the case study organization, tacit acceptance of a gender bias in terms of organizational composition was considered the norm and less likely to engender anxiety. Hence, progress in modifying gender stereotypes remained slow. As Brown and Starkey (2004) observe, organizational change and organizational learning are anxiety inducing processes. Where there is a choice between maintaining a stable self and challenging existing preconceptions, it is likely that inertia would prevent any but the most basic change activity.

Evidence from the research suggests that employees continually updated their narratives to reflect new understandings gleaned from their stakeholders. In a sense, employees were always engaged in a ‘crisis of representation and legitimation’ in order to authentically communicate their identity to a range of stakeholders. Indeed, the evidence suggests that in periods of crisis and change organizational leaders accord more significance to the ‘Other’ in order to define what was unique and distinctive about themselves and their core values. As such presenting multiple identity themes was a carefully considered strategy to achieve legitimacy with multiple stakeholders (Scott and Lane, 2000; Sillince, 2006; Sillince and Brown, 2009). In Shell’s circumstances and in the view of Shell’s MD, women were considered relevant and salient stakeholders in Shell’s identity construction.

8.7 ORGANIZATIONAL EXIT (dis-identification) vs. ORGANIZATIONAL PROMOTION (re-identification).

Employees signal their dissatisfaction with organizations through a variety of means. Sometimes, this may be through apathy and lack of commitment to organizational outcomes, at other times it may be through some form of criminal misbehaviour such as fiddling expenses and damage to property (Willmott, 1993). However, more subtle means of misbehaviour might be attempted where the employee withdraws their emotions and commitment to such a degree that they are doing the bare minimum to earn a salary. To explore further the degree of emotional attachment to or detachment of employees from the organization and the impact of various identity threatening incidents, respondents were asked if they had ever considered quitting the organization. Some respondents indicated that when they came onto the labour market after graduation, Shell was still considered the employer of choice. Even though there was now significant competition in the employment market, many employees did not feel they had made the wrong choice. A respondent described how she perceived working for Shell was almost her destiny,

“Let’s forget about the bad publicity. Shell is a very good company and seen as good for a long time. I’ve always wanted to work here since I was about 5 years old. My dad worked for Shell, so did my elder brother. You may call it a life ambition, a childhood dream of working here. When you talk about... almost every funding in church, our pastor refers to Shell and my husband sighs ‘there he goes again’. Even when praying for people it is wished that they get called up for a Shell job interview. Shell is associated with progress and development. Although, you have the odd complaint about Shell from the communities that Shell did not provide them with water or light there is still acceptance that Shell does more than its industry competitors or the government” (29 years old, female SA storage staff, SG7, 2 years in SPDC).

Some employees indicated that their relationship with SPDC was founded on strong instrumental bonds and they would not be keen to recommend SPDC to their friends and family. They described limitations in the organizations processes and culture, a disconnect between the identity the company projected and the realities at work and a pervasive sense that managers were merely stooges and not in direct control of organizational strategy. However, they also expressed a sense of impotency at their inability to implement what they considered proper change within the system. As one respondent commented,

“Yes, I would recommend Shell to my family in today’s Nigeria. But by the time this economy bottoms-up¹⁷, maybe no. I wouldn’t recommend SPDC because of a lot of random things I’ve mentioned earlier. Transparency is lacking. I’m in HR (Human Resources). I’ve virtually seen it from end to end. When we did the last so-called re-organization they called SOFu (Securing Our Future), there was a lot of victimisation and dealings beneath the table. I feel very bad when people work that way and I feel worse because I can’t do anything about it” (37 years old, male senior learning adviser, SG4, 8 years in SPDC).

Further, it was also accepted and recognised that employees choose to become and remain members of an organization where membership is “derived from participation in competing discourses and various experiences, that is productive of a degree of existential continuity and security” (Alvesson and Willmott, 2002: 625-626). A respondent provided the following anecdote when questioned concerning his reasons for remaining with SPDC despite the observed limitations,

“I was coming back from a field inspection late one evening and I stopped to buy some dried fish from a roadside vendor. I noticed that the vendor had a parrot in a cage. The surprising part was that the door of the cage was open! I observed the parrot come out the cage to peck at some seeds but immediately return to the cage. I asked the vendor why the parrot did not fly away into the nearby forest. His answer was quite interesting. Apparently the bird had once managed to escape from the cage and vanished for almost a week. It returned looking very sorry for itself, dirty and hungry looking. After feeding the bird, he noticed the bird enter the cage of its own accord. Since that incident the bird never tried to escape. Immediately, I thought to myself, ‘That sounds like Shell. You are tied with golden threads of opportunity and you never try to escape’. As they say, ‘in the land of the blind the one-eyed man is king’” (49 years old, male manager, SG1, 24 years in SPDC).

The response above tends to validate the view that subject positions are sometimes consciously assumed by organizational participants. Hence, such employees would likely rationalize and justify contentious organizational events in order to maintain their membership and affiliation to the organization. My research thus indicates that workers in the case study organization attempted to maintain autonomy and engage in a range of behaviours to protect their individual identity at work.

Summary

This chapter captures the plurivocal responses of organizational employees to the structuring discourses of top management. Through sense-giving activities, top management had sought

¹⁷ undergoes a revival or improves significantly – my interpretation

to provide guidelines on what should be the core values and desired identity of the organization. Employees on the other hand had strategically reviewed these core value prescriptions against the reality of organizational existence. Some had accepted the core values as representing a desired end state, while others had adopted and adapted the core values to their own ends. Outright resistance seemed limited within the case study organization and this may be expected for a variety of reasons. Firstly, the organization was undergoing a significant change and restructuring programme and the underlying uncertainty constrained employee's willingness to challenge the status quo. Secondly, the absence of collective representation of any significance ensured that employees tended to monitor quite carefully their individual relationship with the organization. Finally, social identity theory argues that employees seek membership in organizations to bolster their self-esteem and self-worth. In the case study organization facing organizational identity threats, employees engage in post hoc rationalization of organizational events to justify their continued membership of the organization. The following discussion chapter would examine in more detail the processes guiding identity construction, contestation and validation within SPDC.

CHAPTER 9

MINING FOR MEANING – DISCUSSION AND CONCLUSION

9.1. INTRODUCTION

This chapter discusses and explores the data presented in the two previous chapters. It begins to mine for meaning, examining the understanding and exploitation of subjectivity within Shell's organizational settings. It would seek to incorporate the subjective experiences of employees into the social relations of work and also into the context within which work is undertaken. It would explore how management sets the tone and develops a narrative, sometimes to contain and control employees within nets of power and at other times to provide justifications for organizational action and sustain the myth of cultural unity. In this regard, previous researchers (e.g. Kouzes and Posner, 1987) have highlighted the role of organizational leaders in inspiring a shared vision with their constituents, by demonstrating their own personal commitment to the values (through their behaviours and actions), and by rewarding or recognising behaviours consistent with the core values. Employees engage in identity work and identity customisation to meet the demands for authenticity, inclusion and legitimacy. Employees are presented within this analysis as insightful and discerning actors who actively interpret and evaluate management discourse, consume what is considered essential for maintaining social relations and progression but also capable of fostering the emergence of contrary narratives and discourses.

This chapter will explore a number of related themes which underline the fundamental nature of organizational culture and identity in structuring work and interaction. The first section would highlight three themes which are crucial to understanding the social relations of work in Shell Nigeria. These are relationality, context, and authenticity. The following sections will examine how social identification was constructed and maintained in the context of Shell. This would be followed by a brief discussion on how identity change occurs and its implication on organizational processes. The discussion then assesses how organizational identity threats were perceived within Shell and the responses to these threats. The section concludes by presenting the key findings of the study together with suggestions for further studies.

9.2. RELATIONALITY, CONTEXT AND AUTHENTICITY

During the fieldwork and subsequent analysis, it became evident that the individuals' personal sense of identity was based on an African tribal collective consciousness. This was focused on relationality, and this was primarily based on the individuals' links and dependencies on social relationships. This was a reflection of the wider societal context within which Shell Nigeria was located and conducted its business. This understanding is consistent with the theoretical relationships proposed in the conceptual chapter on the relational aspects of organizational identity and culture. These concepts are not understood as entirely distinct but rather overlapping constructs. The focus is on attending to the interconnections between the related constructs of culture and identity, while not losing the actors; attending to the explicit, while holding the implicit near; recognising the dynamics at work, yet remaining aware of existing structures.

With reference to Hofstede's (1980) analytical framework, Nigeria would be classed as having a predominantly collective orientation (though variations exist between and within tribal groups). This fashions a unique understanding of culture in social relationships. As an observer of the Nigerian socio-cultural landscape comments,

"Nigerians' ambivalence about corruption is explained by the realities they face. To the extent that ordinary Nigerians are participants in corruption, as well as critics and victims, it is because they are pragmatic: the stakes for individuals in Nigeria are tied ideologically materially to the social groups to which they belong." (Smith, 2007: 225).

In Nigeria, individual actors' 'personal' identities are inextricably bound to social groups to which they belong such as the tribe, the church, the family and the various cultural preconceptions that define them. The organization or work grouping is perceived as just one and not always the most important social group that employees recognise as requiring their emotional, psychological and cognitive attachment. Indeed, the notion of an individual devoid of his or her associations is considered odd. So much so that when individuals are introduced, it is often considered essential to define them in the context of their network of relationships (e.g. where they come from or who their family is).

In order to acknowledge the impact of context in this study, there have been detailed discussions of context in previous chapters. It was recognised that Shell faced a challenge within Nigeria in appreciating and acknowledging the nuances of identity, culture and their

impact on organizational behaviour within the social context. It was observed by some respondents that Shell's core values were merely global social values. However, these were also the very values which were largely ignored and subverted by the earlier discussed 'Nigerian factor'. It was therefore possible that in clarifying these values, Shell was not simply being reactive to a range of stakeholders but rather was reinforcing the cognitive schema that was to define and structure social relationships and identification within the organization. Shell was taking up value positions which were in direct contrast to that which existed in the wider Nigerian social context.

The understanding of authenticity within this study draws on previous work by Peterson (1997) who demonstrated that authenticity is not only socially constructed and agreed upon but is also used as a renewable resource to secure stakeholder relationships. Peterson (1997) suggests that there are two distinct strategies used for claiming authenticity. The first results from an awareness and attempt to perpetuate organizational tradition and culture. The second route to authenticity arises from an attempt to offer original and distinctive approaches, explanations or processes which reflect the current realities of the organization. In terms of Shell's organizational values, the claims of authenticity became more salient when it was widely agreed that core organizational values merely reflected desirable moral states which were common not just to the major religions but also to most societies.

Ashforth and Mael (1996) observe that "new conceptualizations must be socially validated to be internalized by organizational members" (pg. 450). In order to achieve claims of uniqueness, organizations strive to show how their declared values are authentic or may seek to 'fabricate' authenticity by providing the cultural artefacts required for identity validation. Hence, claims of authenticity are bound up with the organization's needs to be seen as unique or distinctive. As Riad (2007) observes, "the language of organizational culture could be appropriated as "glue" because it can be an enabler of preservation" (Riad, 2007:38). Hence, discourses rooted in organizational culture provided a symbolic rallying call to preserve what was tried, tested and perceived to be authentic about Shell. Additionally, when the framework for sense-making changes, employee perceptions of what is authentic in organizational rhetoric changes as well. As a respondent indicates below, while SPDC continues to use the notion of stakeholders to drive staff identification, this concept was changing together with a variety of other stable aspects of the organization and thus impacts on identification processes.

9.3 AWARENESS OF SUBJECTIVITY IN THE CONTEXT OF WORK

Shell employees presented themselves as highly intelligent and motivated, seeking to translate their skills into successful careers and attain the status and prestige this brought. They perceived their interactions with the organization to be mutually beneficial and these both enhanced their self-esteem and encouraged positive identification with the organization. However, there was the recognition that the power relations were unequal, with the organization exercising control over their careers, their social interactions and in some instances their values, beliefs and assumptions. Indeed Kunda (1992) suggests that organizational members “have entered into a contract that is more than economic, one that must contend with overt external claims on self-definition.... In this sense, members have internalized the ‘problem of control’ that lies at the heart of the organization, and the private selves of members have become part of the ‘contested terrain’” (214-21). Identity work within this context can be problematic and challenging (Sveningsson and Alvesson, 2003; Alvesson and Karreman, 2006).

Closer examination of the literature on identity work reveals the notion that identity work is based on two underlying assumptions: the importance of an external (public) display of role-appropriate characteristics or behaviours and the desirability of internal identity coherence. Within Shell, empirical data suggests that several factors were considered important to the identity work carried out by Shell employees. These included; the performativity of organizational values, employee reactions to dominant managerial narratives and discourses, and the value of an historic cultural legacy in defining identity as authentic or merely aspirational. Within Shell, the understanding of an authentic identity reflected on the past in defining how to move the organization into the future. This involved the existence of workable processes and structures which supported and sustained these narratives within an organizational domain. Conversely, the aspirational identity was conceptualised as an embodiment of top management’s wishes to achieve an end state which was considered eminently desirable. This was driven through structured organizational narratives around particular core values. Here the conceptualisation of an aspirational identity was somewhat different from the term as used by Thornborrow and Brown (2010) who suggest that an aspirational identity is an individual’s construction of an identity he seeks to attain and “self-consciously and consistently pursuing this objective” (Thornborrow and Brown, 2010: 370). Within this study, respondents referred to aspirational identity as a managerially driven

narrative of identity which draws on values supposed to inspire and motivate employees to return the organization to its previous dominance of the oil and gas industry. Hence, this is rooted in a previous organizational identity and is aimed at achieving relevance with employees. This may fail to deliver due to the absence of the necessary organizational supporting processes and a perceived lack of consistency in management support. Contradiction in practice was the bane of any values which were then termed to be merely aspirational and not authentic and employees utilised strategies of participation and involvement to signal acceptance of values or apathy and disengagement to signal lack of identification. The next section explores some of the processes whereby Shell as an organization sought to construct and maintain what was described as an elite identity.

9.4. IDENTITY CONSTRUCTION AND MAINTAINANCE IN SHELL

The notion of exclusivity and elitism was central to Shell's organizational identity. The concept of elitism has been used in previous work on organizational identities (e.g. Alvesson and Robertson, 2006). The common understanding of organizational elite within the literature is of a minority of employees, typically at the top of the organizational hierarchy, who have control of organizational resources and are accorded respect and social status (Hill, 1995; Farazmand, 1999). However, Alvesson and Robertson (2006) suggest that elitism may be dispersed within an organization through accepted notions of membership. Thus, elite status is accorded to any employees who belong to any organization which is considered and socially accepted as 'the best'. This conceptualisation was in accord with the findings in Shell. Respondents indicated that their decision to join Shell was based on perceptions of Shell's dominance of the industry, both locally and globally. A strong global presence and a well known brand image were seen to symbolise quality and accentuated the social status of members. Furthermore, Shell's rigorous recruitment processes were perceived to be manifestations of the company's dedication to excellence in the selection and development of the very best human resources. The level of applications every year¹⁸ and the very few recruits (about 20) selected during each recruitment drive continued to reinforce this sense of elitism and exclusivity.

¹⁸ At the time of the interview (2005) I was notified by a recruitment staff that for the posts which did not get filled through the SITP programme there were about 200,000 applications over the year for about 20 posts.

Shell employees suggested that some of the outcomes of this perceived elite status was that Shell employees were seen to be ‘confident, verging on arrogance’ and that even a junior reservoir engineer could be sent to make a presentation to joint venture partners such as the government and other oil companies. Shell was thus acknowledged to be unique in the latitude and opportunity given to its human resources. During the course of the interviews, the MD at the time of the fieldwork strongly emphasised that Shell’s strength and competitive advantage lay in the quality of Shell’s human resources and that the long term strategy was to enhance their core strength by continuing to employ the very best. He insisted,

“We have to align with our company’s vision and objectives. That’s absolutely basic, because that vision and objective was put together by the leadership team with full consultation with a lot of people. So that is our collective dream and our collective direction that we want to go. And the People Week event just helps us to take that further. We obviously want to be the company of first choice and in that regard, two areas we really have to work on; people issues in retention of people and attracting completely new people. Actually attracting the best people for our company and retaining the very good people we currently have” (Shell MD, People’ week, 2005).

Over the years Shell had sustained this elite perception through an extensive and comprehensive welfare package together with human resource practices which were supportive of a sense of exclusivity. There was a downside to this perception of exclusivity where variations in organizational status and differences in employment contracts produced differentiated understandings and experiences of entitlement. However, at the time of fieldwork, Shell was facing challenges which resulted in the development of core values which competed in some degree with the business imperative. The HR function was thus finding it difficult to meet both the expectations of top management (in managing business outcomes) and the aspirations and expectations of employees based on their perception of what the company was and had been over the years of their employment.

Some functionalist HRM researchers have argued that for a HRM system to be judged a success, there needs to be a close relationship between the validity of the practices and the consistency of the HRM messages. For example, Bowen and Ostroff (2004) highlight the importance of establishing “an *unambiguous* perceived cause-effect relationship in reference to the HRM system’s desired content-focused behaviours and associated employee consequences” (p. 210, italics in original). However, although the employees’ plurivocal responses in this study contradict the notion of a secure, consistent HRM system, there were some aspects of the HRM system which were regarded as upholding and sustaining the

values and identity of Shell. Thus employees maintained that Shell recruitment continued to recruit not just the best academically but also those whose values, such as honesty and integrity and accountability were in accord with Shell's core values. Similarly, staff respondents commended and upheld some HR systems for maintaining Shell's identity as a company where development of employees was a core management process which was supported through the provision of a range of opportunities. Thus the benefits to Shell of having a desirable social identity included; the ability to attract and retain the best employees, maintaining a positive image and identity with the public and creating a strong sense of identity and identification within the organization which facilitates self-control, self-discipline and promotes organizational objectives.

It was widely suggested during the course of fieldwork that the notion of the Shell man had changed over the years, especially for older staff whose longer tenure within the organization provided them with a clear overview of the transition over time in terms of how a Shell man (or woman) perceived their identity and the processes which facilitated greater identification with the organization. In the context of Shell and its institutional and social setting, employees considered themselves members of a family of professionals, whose standards and values, though influenced by societal expectations, were primarily defined by their membership in what they considered an elite organization. A Shell man/woman, was therefore compelled to adhere to a high level of professionalism, maintain certain standards of integrity and accountability in order to retain membership within the organization and legitimacy with a range of stakeholders. With the various changes within Shell and the adoption of HRM processes which sent conflicting messages to members, this social identity was threatened

The concept of social identity has been defined as 'the individual's knowledge that he or she belongs to certain social groups together with some emotional and value significance to him/her in this group membership' (Tajfel, 1972: 292). Three key aspects emerge from this definition: firstly, an awareness of social belonging which highlights the interactions between self and other, and a need to fulfil a role and become socialised such as to act in a manner congruent to meaning systems with which the group identifies. Secondly, an emotional attachment to the group such that withdrawal from the group would initiate some feelings of existential loss and anxiety; and thirdly, acceptance that group membership implies an acceptance of the values and behaviours of the collective. It is useful to highlight that this

definition tends to promote a positivist bias and does not recognise that the attachments an individual forms with or within the organization are multiple and various and this moderates the levels of psychological attachment they may have with the organization or the extent of anxiety which may be experienced during withdrawal. This will be teased out later in a typology of organizational identification. However, it would be illustrative to examine the impact of organizational change on employee's identity concepts.

9.5 ORGANIZATIONAL CHANGE

Weick (1995) noted that identity changes with changing organizational contexts. Gioia et al. (2000) further argued that organizations engage in identity changes in order to enhance their chances of survival. They suggest two models of change: reactive change, where the change effort is driven by images from powerful stakeholders who are not congruent with the aspirational needs of the organization and which may lead to stagnation and death. Proactive change which involves some decisive action from top management in order to move the organization to an alternative vision even in the absence of organizational threat. In a study by Gioia and Thomas (1996), top managers projected visions of a desirable image as a stimulus to drive the identity change within the organization. Thus, the difference between the two approaches is focused on agency; reactive change is driven by outsiders whilst the proactive change is self-induced by top management.

Drawing on insights from recent research on organizational identity change (Dutton and Dukerich, 1991; Gioia and Thomas, 1996; Empson, 2004), and identity regulation (Alvesson and Willmott, 2002), a framework is presented below on organizational identity change (Fig.9.1) which modifies a previous model suggested by (Empson, 2004) by incorporating two additional identification processes; neutral identification and ambivalent identification (Kreiner and Ashforth, 2004). The modified framework also incorporates the notion that identity regulation may also be aimed at breaking down sub-group identifications especially when these become deviant, counterproductive or are in competition with the organizational identity (Pratt and Foreman, 2000) or by clarifying the preferred organizational identity when ambiguity exists (Golden-Biddle and Rao, 1997).

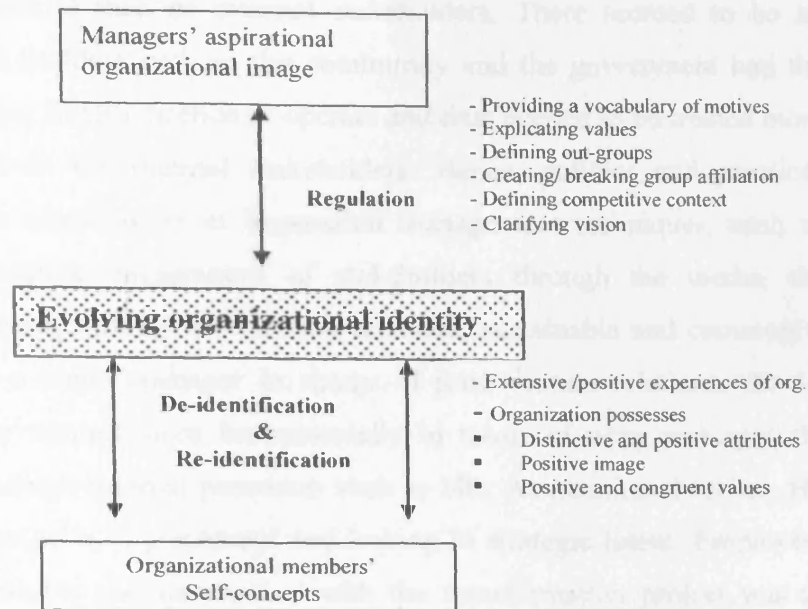


Fig. 9.1. Framework for organizational identity change (Adapted from Empson, 2004)

The critical approach to organizational identity asserts that it is discourse which determines and constitutes the subject's identity, with the subject being trapped in discursive structures (Heracleous and Hendry, 2000) and is therefore a powerful way of exploring struggles within organizational life (Hardy et al., 2000). Although discourse is used to construct identities in organizations, Ward and Winstanley (2003) observe that agency is not extinguished entirely, and that discourse can be used to build power as well as to curtail it. They effectively link their observation to Foucault's discussion of 'reverse discourse' and resistance where minorities are created and empowered to resist hostile discourses.

In implementing change, Shell adopted most of the practices illustrated in the model of identity change above (Fig. 9.1). However, employees perceived identity and culture change to be taking place side by side and simultaneously. Shell management were assumed to have used the excuse of identity change to identify and eliminate not just those who were widely considered out-groups but also those who were regarded as non-establishment and likely to threaten the organization's narrative of a unitary and consistent culture or worldview. In so doing, it is suggested that a useful medium to ensure a balance in narratives within the organization was lost. Additionally, Shell seemed to have sought to change their identity in

two ways. In a qualitative sense, Shell sought to be portrayed as a caring and responding organization more to its external than its internal stakeholders. There seemed to be an assumption that external stakeholders such as the community and the government had the upper hand in terms of limiting Shell's licence to operate and thus needed to be treated more consistently and carefully than the internal stakeholders. Hence, policies and practices adopted by the organization aimed more at impression management techniques, such as stakeholder fora, more proactive engagement of stakeholders through the media, the development of a directorate specifically for external relations, sustainable and community development initiatives and a senior manager in charge of joint venture relations. On the other hand, employees were treated more instrumentally in terms of what messages the organization was sending through internal processes such as HR. As mentioned earlier, HR processes were deemed to be ad hoc, piecemeal and lacking in strategic intent. Employees were treated as disposable assets and intertwined with the transformation project was an extensive downsizing initiative which contributed to a palpable sense of insecurity and uncertainty.

On a more substantial level, Shell has sought to promote a different identity as an energy company rather than an oil company. Within the Nigerian context and globally, oil has become widely associated with pollution and damage to the environment. Shell re-branding efforts thereby sought to create positive associations of Shell's activities with wholesome and clean energy sources such as gas and renewable sources. Employees reported that Shell's long term vision was the development and delivery of associated gas from all its wells while reducing its operational 'footprint' within the Niger Delta. Hence, staff who were credited to represent Shell's future were widely acknowledged as 'OK LNG' or considered 'LNG compliant'. This suggested that these employees were considered capable of meeting Shell's Liquefied Natural Gas (LNG) objectives. More recently, since the middle of 2010, Shell Nigeria has been engaged in the divestment of many of its land based assets such as oil fields and flow stations which has significantly reduced its operational 'footprint'. More significantly, Shell has sold these facilities together with the staff operating them. Thus, with the mark of a pen staff who considered themselves a part of Shell for the long term, were transferred automatically as stock to the new company. As of early 2011, contacts of the researcher confirmed that almost all mining leases and operations in the Shell Nigeria Western zone had either been sold or were awaiting completion. Shell was aiming to focus its

oil operations in the East (i.e. Shell's operational base in Port Harcourt, Nigeria) and off-shore locations and grow its gas presence significantly.

Thus, Shell's inchoate human resource practices which supported the new Shell identity and culture were consistent with a long term strategy of divestment and business repositioning within which top managements objectives were at variance with those of most Shell staff.

Hence, employees' scepticism reported in this research which suggested that the mantra of identity change hid a sinister agenda which subverted employees psychological contract was borne out over the long term.

9.6. CHANGING PATTERNS OF IDENTIFICATION WITHIN SHELL NIGERIA

Previous research has highlighted how the very definition of organizational roles and job descriptions are implicated as acts of power and control. Acker (1990) argues that 'The positing of a job as an abstract category, separate from the worker, is an essential move in creating jobs as mechanisms of compulsion and control over work processes' (154). Many of the respondents within the case study organization were either ignorant or oblivious of the lack of control over their organizational roles and how these were carried out. For the majority, their role was accepted as part of an organizational contract and their flexibility in addressing any changes was expected. However, some respondents saw the renegotiation of roles as an opportunity to exert influence and gain leverage during the process of change.

These actively sought to enlarge their roles and hence improve their visibility. A good example of this approach was referenced in Chapter 8. In this case, the interviewee embraced his role as a well optimisation engineer but also enhanced this role to include change agent and transformation contact for his functional team. He suggested that he really believed in the change process but there was the added recognition across the division which would be of benefit to his career. Though he was considered a 'cultural dupe' by a variety of his colleagues, he considered organizational change to be long overdue and believed the organization to be moving in the right direction. The next category of staff, considered the flexibility of their roles to be an example of top management taking unfair advantage of staff. In the absence of effective worker representation within SPDC and the ongoing staff

uncertainty during the period of re-organization, management could increase workloads arbitrarily and disguise this under the narrative of change and efficiency.

It was equally instructive that most interviewees were largely unaware that as their work role within the organization changes, this had implications for their identity construction. As Ibarra noted: “Despite consensus in the socialization literature that identity changes accompany work role changes, the process by which identity evolves remains under explained” (1999:765). However, some respondents noted that in adopting a new role, there were requirements to fit in or pick up values which might be specific to that team or occupation. Hence, employees experiment and try out different ‘provisional selves’ (Ibarra, 1999) in order to achieve some form of role adaptation.

The change in the nature of work and its specific identity requirements from individuals were likely to trigger what has been termed work-identity integrity assessments (Pratt et al, 2006). This occurs when respondent’s view of ‘who they were’ as professionals (i.e. their professional identity) does not directly relate to the work they do. This situation occurred relatively frequently within SPDC where employees were encouraged to engage in lateral development opportunities in order to acquire a broad overview of organizational functions and processes. Additionally, within the context of change, employees who were not willing partakers of lateral development processes, had to take up available work roles within the new organization. In order to resolve work-identity conflicts, it was observed that employees adopted two distinct processes to ensure some form of identity customization. They either engaged in intra-work identity validation or extra-work identity validation.

Intra-work identity validation required the individuals to focus on and enrich elements of their work role which highlighted desirable aspects of their professional identity and downplayed the relevance of other work. An example of this was a surveyor who described his work as ‘boring and uninspiring. I spend a large portion of my time drawing up contract, raising invoices and doing administrative tasks. However, I find opportunities to go into the field on field inspections. Then, I am able to do what I have really trained to do’. Similarly, an employee’s seeking intra-work validation may rely on social validation by professional peers through social networking activities or validation through interaction with or reference to role models.

Extra-work identity validation was carried out when employees sought external validation of their role as professions and such feedback was instrumental to defining their identity. An example provided within the thesis explored how membership of professional groups such as the Society of Petroleum Engineers was used by employees to confirm their identity even when their actual work within Shell contained very little professional content.

Where respondents indicated that there were no work-identity conflicts, these were employees who either occupied work roles that were consistent with their sense of self or were those who viewed their relationship with the organization in merely transactional and instrumental terms. Their foci of identification were rooted more in the terms of reciprocity whereby they expected the organization to be consistent in delivering those benefits which they expected as compensation for maintaining membership and contributing to organizational outcomes.

The findings from this study suggest that despite the potential for work-identity conflicts arising, employees who experienced different work roles within the organization were likely to identify more with the organization than the role which they occupy. In the case of Shell, the strategy of lateral development provided a structure for organization-wide identification. Employees perceived that such exposure improved the career prospects of the individual while enhancing their self-esteem and prestige and thus enabled greater identification with the organization and its processes.

9.7. RESPONSES TO IDENTITY THREATS

9.7.1. Organizational level responses

Organizational members are said to identify with the organization when they define themselves at least partly in terms of what the organization is thought to represent. It is this perception of oneness (Ashforth and Mael, 1989) and the implication of the self-concept (Pratt, 1998) that differentiates **identification** from other similar and related constructs such as person-organization fit and organizational commitment. Cues relating to what the company is thought to represent emerges within the organizational context and its environment and includes such organizational specific cues such as specified values or vision, goals and objectives of specific groups or teams or aspects of an organizations historical legacy. As

such individuals may identify with the organization at the global level ('I identify with Shell') or with specific aspects or attributes of the organization ('I identify with Shell's values of diversity and team work'). Indeed, in previous research, Dukerich, Golden and Shortell (2002) established that organizational identification of physicians with their respective medical systems was focused on what were considered desirable or attractive attributes of those systems (e.g. state of the art medical technology, quality care provision for patients and a bottom-line focus).

In a context of corruption and public misconduct (see reference to the Nigerian Factor in the context chapter), Nigerians look to major multinationals such as Shell as a beacon of hope, with the expectation that such significant actors would somehow influence the apparatus of state and improve the level of accountability and probity. This has certainly been implied in the discourses and narrative of staff who would like to portray Shell as rising above the intransigent corruption and being a major force for good. Indeed, there was evidence of employee distress and disappointment when they begin to acknowledge that by the lack of compliance to stated organizational values and principles, Shell's practices were complicit in or upheld structures of corruption. Overt admissions of complicity were rare but the conversations and discussions during fieldwork referred to instances where company actors, utilising the 'Nigerian factor' for the company's benefit, circumvent good practice and safety considerations which would be mandatory in any civilised society. This awareness became greater the higher up the organizational chain as such respondents were privy to more information and were more likely to be delegated to take care of company business.

This sense of disenchantment and discontent did not always translate to exit intentions from these actors, rather some participants justified the company's position on economic grounds or the competitive organizational context i.e. it's a difficult terrain to operate in and we have a duty to shareholders to use any 'legal' means to provide financial returns. Alternatively, a recourse to social realities enabled Shell respondents to blame the endemic 'Nigerian factor' for their failings i.e., we did not create the corruption and we do challenge it at every opportunity. However, this constitutes one of the realities of doing business in West Africa. We are not here to be the moral or social conscience of the nation. Indeed, it would be fanciful and presumptuous to set ourselves up as the moral arbiter of Nigerian social life. We are here only to do business and earn a proper return on our investments'.

This pattern of aloofness and distancing was recognised as a strategy adopted by Shell as an organization prior to the Ken Saro Wiwa crisis in 1996. This was the case where Shell was accused of complicity in the Nigerian Governments' hanging of the Ogoni leaders (or militants as they have been called) who were protesting the years of oil extraction from their land.

There was an obvious change of corporate strategy post Ken Saro Wiwa with the growth of the listening and communicating Shell. With Shell's identity tainted by the stigma of dirty work through the pollution of the Niger Delta, Shell reacted to re-image itself in the public consciousness. While maintaining their innocence for the Ogoni affair, Shell publicly acknowledged that it may not have listened adequately in the past and was going to engage its stakeholders more proactively. Significantly, Shell indicated that it had engaged in widespread consultation across the Shell group to re-examine and re-evaluate the Shell business principles and values. The outcome of that self-examination was the implementation of more visible engagement with a wide range of stakeholders (Source: Shell website and archives). In pursuance of this strategy, Shell upgraded its External relations and media department into a fully fledged directorate with representation on the board and began a series of highly publicised road shows and stakeholder engagement sessions. Shell Nigeria coincidentally or intentionally also began to promote Shell not as an oil company but as an energy company. This was an important shift in terms of how the Shell wanted to be identified and perceived by its public. In tacitly acknowledging that the public image of Shell was tainted by oil spills and contamination, visually illustrated through media presentations of oil slicked mangrove forests, Shell was opting for safer, more neutral terms for identifying its operations. Other responses occurred at an individual level as employees sought to achieve an optimal balance between their individual identity and their identification with the organization. Some of these strategies are detailed below.

9.7.2. Individual identity responses

Employees acknowledged feedback from stakeholders that Shell's identity was stigmatised through its contribution to the oil contamination within the Niger delta. In response to this perceived identity threat certain factors were influential to their identity response. These

included the desire for optimal balance, the prominence of the social group to an individual's identity and the salience or prominence of the perceived identity threat.

For some respondents, who seemed sufficiently distressed to consider exiting the organization, their sense of betrayal arose out of perceptions about internal events within the organization where trust in top management was low and the change programme was considered to be traumatic. Most respondents utilised distancing techniques to maintain their individual sense of self. Some indicated that they minimised contact with colleagues outside the workplace, stating that they could only cope with Shell issues within the workplace and would not want to take this outside work. Other engaged in post hoc rationalisation of organizational activities justifying their membership by either claiming that the incidents were lacking in credence or that such incidents were not as significant as reported. To illustrate this point, an interviewee commented that he had been up in a helicopter several times across the Niger delta but could not see the widespread contamination reported in the press. Although he acknowledged some pollution he argued that the negative representation by vested interest group, such as environmental pressure groups and some local communities out to make expensive compensation claims, sought to stigmatise Shell's identity.

Yet other individual respondents engaged in social weighting processes where they examined the extent and prominence of the stigma associated with Shell in order to determine their responses to these threats. However, it was also important to note that in consonance with the suggestions of social identity theory, the individuals sense of belonging to a unique group also tended to moderate their responses and sometimes conversely utilised the stigmatisation as a means of increased identification. Where employees felt that they were wrongly targeted or felt that the stigma was disproportionate to the organization's failures, they may band together in opposition to the out-group thus generating and sustaining a shared group response. A strong defence of these aspirational values and identity themes may result through these social weighting strategies, the refutation of the basis of any associated stigma as inaccurate, unfounded, poorly informed and therefore not legitimate. Social profiling and social categorization thereby enabled employees to ascribe prototype status to themselves and other organizational referents such as mentors and thus act as guardians and custodians of the organizations identity and culture.

The next section concludes the thesis by summarising the findings, identifying limitations to the research and highlighting areas for further research.

9.8. CONCLUSION

Despite the demonstrable interest in culture and identity within organizations, there has been much discussion about the qualities that define these constructs and how these are related. This thesis has sought to provide some understanding of how these concepts are perceived within organizational settings as well as highlighting the organizational processes that are implicated in their development and maintenance by asking the following questions:

- i) How do employees perceive their organizational identity and culture?
- ii) How do organizationally espoused values contribute to the development, maintenance and coordination of organizational identity and culture?
- iii) How does the organizational culture provide a context for the expression of an organizational identity?
- iv) How does the organization communicate its values and/or identity to its various stakeholders?
- v) How do different organizational processes and structures interact to sustain organizational culture and identity?
- vi) How do organizational identity threats affect employee withdrawal or turnover intentions?

The relational framework adopted in this study demonstrates empirically that the differences between culture and identity are more a matter of degree than of kind. Furthermore, there has been very little discussion of the function that organizational values play in defining and validating these concepts within organizations. This thesis begins to bring an awareness of these issues to the surface.

The main finding of this research is that organizations undergoing major change or facing identity threats articulate and communicate core values which serve to authenticate, legitimate and validate identity claims with reference to organizational culture. Employee

perceptions of identity are thus inherently adaptive and incremental, reflecting the core culture, organizational history and salient stakeholder concerns.

The initial purpose of the study was not only to provide empirical or descriptive data, but also to contribute conceptually and theoretically to the understanding of organizational identity, culture and values. Throughout this thesis, I have explored a range of theoretical concepts regarding work organization, human relations and organizational behaviour in relation to a deeply contextualised case study. In seeking to uncover the relationship between identity and culture, organizational discourses were explored in some detail. As has been previously suggested, researchers can uncover taken for granted values and beliefs within a particular context through identification and analysis of discourse themes, especially their unstated and assumed premises (Gill and Whedbee, 1997).

This concluding section will highlight the conceptual and empirical findings from the research and demonstrate the theoretical and practical contributions of this study. I will also highlight some areas which could be explored in future research as these could not be adequately addressed within this study.

9.8.1. Key Findings

Like all major multinationals within a well developed industrial sector, the case study organization conformed to certain isomorphic pressures in terms of technology use, availability of human resource, industry regulation and best practice as marketed by consultants. However, this multinational also exhibited peculiarities in terms of how it addressed its challenges in meeting its human resource needs, engendering control and commitment of its workforce, managing the diverse expectations of its various stakeholders and defining its unique identity. This section would highlight some of the key theoretical and conceptual findings from this study using Shell Petroleum Development Company as an industry exemplar. In order to articulate these findings, I would revisit some arguments presented earlier relating to the development and deployment of core values and their communication to stakeholders, power and control dynamics within organizations, work organization and the nature of employment, the gendered nature of identity and the contest

over diversity and the role of HR practices in the performance and authentication of core values.

Within the literature it has been demonstrated that during organizational change programmes there is a concerted attempt to change employee behaviours and goals. Indeed, the successful implementation of any change hinges on employees' willingness to modify their attitudes, and adopt new values and behaviours (Ashforth and Mael, 1998; van Knippenberg et al., 2006). The key discourses used within the case study organization to drive and underpin the change process revolved around the core values.

These core values may be implicit in organizational practices and understood within the context of an organization's culture or they may be more explicit in the form of identity defining statements. The findings from this thesis suggest that organizations seek to define and articulate explicit core values in the face of identity threats. This is in keeping with previous research within organizational studies (e.g. Ravasi and Schultz, 2006). Additionally, core values may be defined when the pressures for industry isomorphism (DiMaggio and Powell, 1983) create challenges for organizational leaders to define their brand distinctiveness and uniqueness. The question 'who are we?' becomes more urgent for both the organization and their stakeholders.

The organizational justification for reviewing its values was embedded in specific historical aspects of Shell's culture where Shell's reputation was tarnished within Nigeria and globally by the government response to the Ogoni crisis in the Niger Delta of Nigeria. An outcome of this crisis was the execution of several Ogoni leaders by the military junta on the grounds murder and incitement to violence. In the aftermath of this incident, external stakeholders were vociferous in criticising Shell's practices and processes. In articulating these core values and communicating them consistently, Shell management sought to achieve several objectives. Firstly, Shell was portrayed to all stakeholders as a dynamic, reflective learning organization which was courageous and moral enough to accept past failings and highlight core values which would be used consistently as a baseline in future interactions with all stakeholders. Indeed, from a psychodynamic perspective, Shell could be characterised as a 'wise' organization when compared with similar organizations within the industry (Brown and Starkey, 2000: 113).

This chain of events support, to some extent, the theoretical framework developed in chapter 3 and that is represented in the figure below where significant events in an organization’s culture lead to the articulation of organizational values. Where the various stakeholder view these identity claims as authentic, this validates the identity conceptions and these may become embedded in cultural practices.

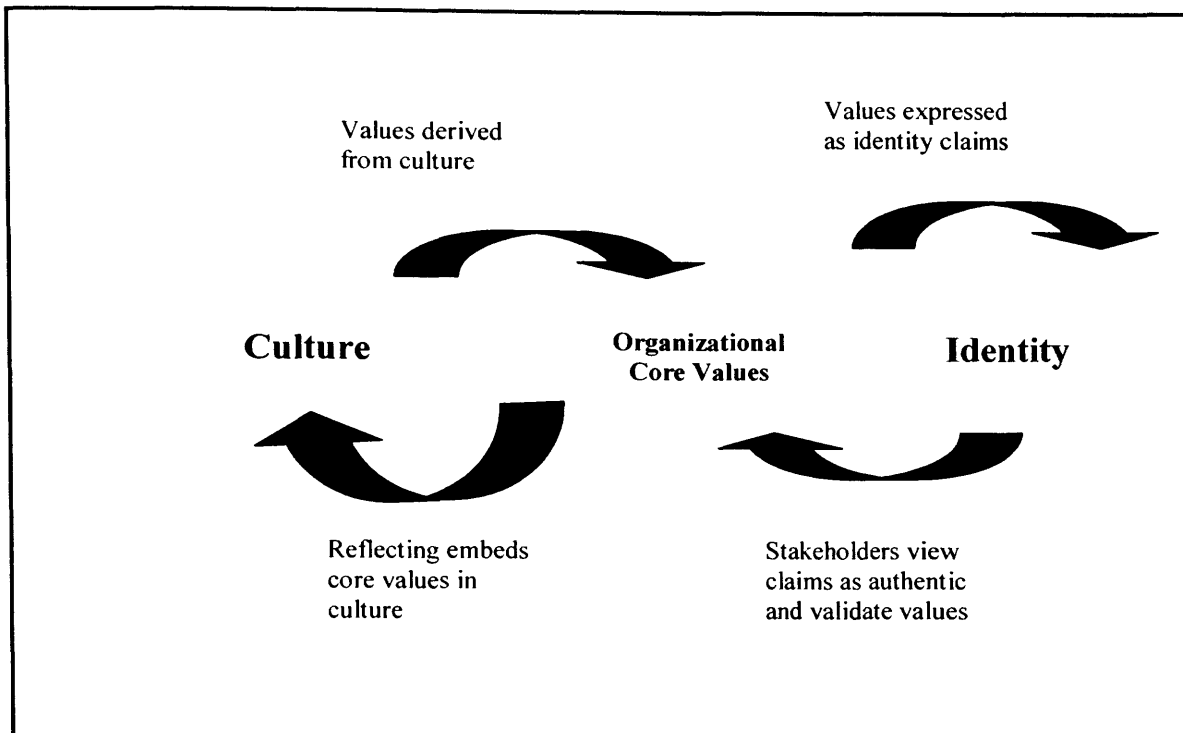


Fig. 3.3. Core Values as linkage between identity and culture – Theoretical Framework
(In the diagram above, the arrows are not meant to represent complete loops).

Secondly, the core values became a structuring device by which top management sought to control and coordinate organizational responses around a set of defined themes. Essentially, the organization utilised core values as a power effect, defining discourses which were legitimate and neutralising alternatives (Kornberger and Brown, 2007). This observation is consistent with previous research which has observed that, “*the modern business of management is often managing the “insides” – the hopes, fears, and aspirations – of workers, rather than their behaviours directly*” (Deetz, 1995: 87). Based on the research evidence, there was a lack of consistent convergence and consensus around the hegemonic discourses promoted by top management. Plurivocal responses from some employees both

contested and subverted these discourses to support other patterns of sense-making. As has been observed previously, 'organizations are composed of many different accounts, some competing, some overlapping which are embedded in conversations that occur simultaneously and sequentially' (Humphreys and Brown, 2002: 928). The analysis in this study suggests that employees seemed more focused on evaluating how authentic the core values were when juxtaposed against organizational cultural practices and norms. In addition, the performativity of these core values operationalised through HR processes and practices was seen as a key means of assuring acceptance and commitment to the identity claims proclaimed by the organization. Evidence from the case study organization indicated that employees highlighted two types of organizational identity. These were aspirational identity and authentic identity. Aspirational identity was attributed to top management sense-giving processes and communications and defined a normative identity for the organization. Authentic identity was associated with organizational sense-making and emerged through a process of validation of core values by cultural norms and practices. Authentic identity reflected employee's realistic assessment of how their lived experiences supported their collective self-concept.

Thirdly, Shell management strategically communicated the core values as a strand of consistency that linked the history and culture of the old organization with the revised identity of the new organization following organizational change. Hence, during periods of change and anxiety for employees, the management utilized the core values as a means of exhibiting a stable transition from one phase of existence to another. The message to employees was that though there may be changes in processes, work roles and reduction in staff numbers, the overarching framework for sense-making remains in place. Therefore, there was a clear correlation of the core values to the change processes:

Honesty and integrity – the organization claimed to communicate honestly with employees regarding the imperative for change.

Respect for people – employees were treated with dignity and respect throughout the change process. Employees leaving the organization were treated with dignity and all remaining staff were provided support in adapting to the new organization.

Diversity and inclusiveness – Shell was seen to encourage diversity and inclusiveness and this was considered a salient factor for employee identification.

It was observed that for organizations such as Shell, which have long dominated their industry sector and whose members were therefore characterized by excessively high self-esteem, there was a tendency to engage in extended programmes of identity maintenance especially during periods of identity threat and change. Shell employees, identity maintenance was focused on denial and post hoc rationalization when challenged by external stakeholders. This finding is consistent with and provides empirical confirmation of some of the identity responses proposed by Brown and Starkey (2000) in their review of the psychodynamic perspectives of organizational identity. In external communications, Shell presented a uniform justification of its activities by consistently calling attention to its core values and business principles. Top management claimed that Shell's corporate identity was being compromised by events outside its control. Internally, there were divergent responses from this central theme. Employees questioned the rhetoric of the organization and reflected on how to promote an authentic organizational identity rooted in their culture.

Previous work has highlighted the hierarchical understanding and application of culture and identity within organizations (Corley, 2004). Within this early work, there was a clear demarcation between managers and staff in how identity and culture was perceived. This was not the case here. In this study the demarcation was more blurred and contested and involved tenure rather than hierarchy. It was observed that there was a difference in the perception of organizational identity between staff who had shorter tenure within SPDC (6 years or less) and staff of older tenure (above 6 years with SPDC). These newer staff were more open to management advances and were actively seeking to progress within SPDC. For most of this category, they had no recollection of previous restructuring exercises, did not have social networks which were disrupted through change programmes and although most acknowledged that Shell might have faults, they believed that Shell was still a great force for good within Nigeria and the local Niger Delta region. Older staff on the other hand had a more culturally focused view of Shell's identity. They could relate to the changes which had occurred in the psychological contract and were aware of the changing nature of Shell's strategic direction. And for some of these employees, they perceived the organizational values as recycled material, as values which had been in long existence within the organization but which had been reactivated, dusted down and re-introduced into the

organization as central narratives or discourses. Their cynicism led to widespread apathy and ambivalence and these employees were willing to demonstrate behavioural compliance to remain within an organization which still provided material benefits and a positive social network of peers. To illustrate this perception amongst older employees, a high profile respondent (a senior manager) who had been highly critical of Shell, was asked why he had not left Shell and what would make him leave. He responded that aside from the financial rewards which were quite significant at his level, what kept him working for Shell at the moment was his network of peers. He commented that the moment he looked around and found that all his peers had left then he would be leaving Shell the very next day.

This manager argued that although values were an important aspect of his identification with Shell, he considered his network of peers as more relevant to his continued emotional attachment to the organization. Indeed, he argued that if for some reason this network left the organization then he would seriously reconsider his position. Thus, the lived and shared experiences with peers provided a validating reassurance that the values promoted by the organization had a continued relevance in supporting growth and development within the organization. It could be argued that peers were crucial in self-categorization processes and removed some of the identity anxiety which arises during organizational change. Identity became more easily sustained because shared experiences within the organizational culture provided a common frame for understanding and attributing meaning to organizational events. There was a suggestion from the evidence that longer tenure within the organization strengthened the bonds between peers and thereby promoted this group as a focus of identification.

Another key finding of the study is that contrary to organizational literature which uncritically suggest that values may be introduced to engineer consistency around organizational norms and structure the behaviour of employees (see Kunda, 1992; Beyer et al.2000; Kirkhaug, 2009), the absence of an agreed cultural framework for sense-making complicates this process. This is particularly relevant to multinational companies which exist across different cultural contexts or are composed of employees of different cultural orientations. The lack of a common framework ensures that the uniform interpretation of these values remains problematic leading to increased resistance and ambiguity. Hence, the aspirational identity proposed by top management is hardly realised as this is not perceived to be authentic by employees.

However, a significant contribution of this study is that contrary to previous work which neatly present linear models of identity regulation, construction and maintenance as clearly compartmentalized within organizational settings (e.g Chreim, 2002; Empson, 2004), a more dynamic and interactive process was observed. Evidence from this study indicates that the level of managerial strategic intent during change processes is not as structured as has been suggested. Implementation of identity and change initiatives tended to be more ad hoc and reactive rather than strategic to the organizational context. It could be argued that management communication of the organizational core values and aspirational identity to both internal and external stakeholders was tempered by the exercise of strategic choice on the part of the employees and legitimacy considerations from external stakeholders. Subsequent patterns of identity defence, validation and authentication indicate that the agency of employees could be a more important factor than has previously been presented. Thus, employees utilise their discretion to dip into the organizational core values to select identity themes which are relevant to their circumstances and which provide both ego defence and enhancement.

During cultural change processes, focus on values can lead to identity nostalgia which may be beneficial in that it allows organizational members to validate their new understandings through cultural symbols and artefacts. However, where this is not channelled properly through adequate communication, these feelings of identity nostalgia may lead to significant resistance to any identity modifications as unnecessary and counter to established cultural practices. Evidence from the research suggests that employees continually updated their narratives to reflect new understandings gleaned from their stakeholders. In a sense, employees were always engaged in a 'crisis of representation and legitimation' in order authentically to communicate their identity to a range of stakeholders. Indeed, the evidence suggests that in periods of crisis and change, organizational leaders accorded more significance to the 'Other' in order to define what was unique and distinctive about themselves and their core values. As such presenting multiple identity themes was a carefully considered strategy to achieve legitimacy with multiple stakeholders (Scott and Lane, 2000; Sillince, 2006; Sillince and Brown, 2009).

9.8.2. Limitations and thoughts for future research

Research Limitations and constraints

Similar to all forms of research, this study has a number of limitations which arise either through considerations of scope, time, method or resource constraints. This research was designed specifically to review employee perceptions of identity and culture within Shell Petroleum Development Company, possibly one of the largest employers of human resource in Nigeria and an industry leader. This was theoretically interesting for a variety of reasons.

Firstly, Shell Petroleum Development Company was part of a multinational brand that had established itself as a big player in the oil and gas industry sector and was perceived to be dynamic in the application of new technology and human resource practices. Shell training and development facilities were second to none in the industry and functioned as a learning hub for other energy affiliated organizations within the continental sub-region. However, the scope of the research was not sufficiently extensive to explore the consistency of Shell's global approach to identity and cultural issues - especially the manner in which meaning was generated and communicated. It could not be decided from the thesis whether the approach adopted in Nigeria was applicable only within that cultural and institutional context.

Secondly, Shell Nigeria coped with a diverse range of human resource challenges due to its size and geographical spread. As the largest employer of human resource in the sector, Shell magnified the challenges faced by other similar organizations in addressing institutional constraints, in accessing sufficiently skilled staff, managing the various work practices adopted to ensure numerical and functional flexibility across its different work-streams and adapting best practice to fit local context. Indeed, as an exemplar of the industry, Shell Petroleum was a useful proxy for understanding some of the challenges within the industry while detailing the specific organizational responses of the case study organization. However, due to the difficulties in gaining access and the context specific focus of the case study, any information provided on the practices of other firms in the industry sector is mostly anecdotal. It would have been illuminating to gain access to a variety of firms in this sector to explore the range of organization specific responses to institutional and labour market constraints.

Finally, Shell Nigeria had recently been exposed to several identity threatening events and was involved in extensive organizational restructuring. As such, this provided a context within which identity and cultural themes were already relevant. Due to time and resource constraints it was not possible to examine how identity and culture issues were addressed during periods of stability within the organization.

Thoughts for future research

In terms of scope for further work, it would be interesting to explore the extent to which there was institutional and industry isomorphism (DiMaggio and Powell, 1983) within the sector. Though respondents agreed that there were commonalities in technology, institutional constraints and market forces, there was lack of consensus on the existence of an industry wide culture. It was suggested that the ownership structures, origins and values of the different organizations within the sector may lead to different cultural responses to the same challenges. Furthermore, it might be useful to explore the strategies or discourses organizations constrained by industry isomorphic pressures resort to in order to claim culture uniqueness or identity distinctiveness. These could be evaluated in a broad industry-wide study.

Further work could also be done on spatially dislocated staff in order to understand what impact core value prescriptions have on their construction and validation of identity. This sample segment was not sufficiently addressed in this research due to security concerns in getting to field locations. Research in this area is especially relevant as these staff may be slightly less exposed to centrally coordinated communications and sense-giving processes and may be exposed to different and contrasting frames of reference which could make sense-making inconsistent with desired organizational norms. Indeed, previous research has suggested that as the virtual workforce grows in numbers, traditional means of managing employees may become less relevant. Hence, understanding the mechanisms of organizational identification becomes more essential “because it may replace or otherwise compensate for the loss of aspects of traditional organizations that facilitate cooperation, coordination and the long-term effort of employees” (Wiesenfeld et al., 2001:215). Within this study this aspect of organizational identity was touched upon by respondents who felt that absence from the operational center of the organization was a distinct source of

disadvantage in terms of human resource benefits such as training and development. Furthermore, there was a perception that the skills which they deploy were not given adequate recognition within the organization (Grugulis, 2007). This was perceived to be ironic by field staff as they were responsible for developing and maintaining the infrastructure used in oil extraction but were deemed inferior to petrophysicists and other geo-seismic analysts who identify and quantify the oil reservoirs.

Additionally, it would be important to explore more fully the role of mentors as significant prototypes within organizations and the importance they provide in stabilizing identity construction and maintenance. Within the study it became apparent that individual respondents' understanding of organizational identity became implicated with what may be termed an 'organizational prototype'. Successful and popular mentors were idealized as an exemplar of what a 'Shell' person should be. In this vein, mentees showed extreme anxiety when a mentor voluntarily left the organization. Interview respondents questioned why he/she would leave if the organization's identity was as desirable as was claimed. Any future work could seek to evaluate the mechanism by which mentors support or sustain organizational identification.

Finally, sub-cultures are major foci of identification within and across organizations. As such identity conflicts may arise where the identity prescriptions of a professional sub-culture runs counter to the dominant identity discourse within the host organization. A study that explores the influence or impact of sub-cultural identification on organizational identity may be able to highlight the processes which govern the inter-relationships between these foci of identification.

This thesis has explored in some detail the organizational context, work organization, work processes and employee perceptions in the Shell Petroleum Development Company Nigeria Limited. The purpose was to explore employee perceptions of culture and identity and provide some empirical and conceptual grounding for previous theoretical suggestions. In so doing, I have critically analyzed a number of key arguments and theories relating to identity and culture within organizational settings. Where gaps were identified these suggested a different approach and different research questions might be more appropriate in exploring these organizational phenomena.

While some of the conclusions and findings presented are not new, they provide additional validation for existing theories and also query nuanced representations of organizational identity construction as consistent, consensual and harmonious. Employees as knowledgeable actors critique dominant identity discourses and validate the identity themes as either authentic or aspirational relative to their cultural context. In short, the conclusions suggest that previous conceptualizations of identity and culture within organizations need reviewing and updating. Identity and culture are not the same concepts which may be used interchangeably. Both interact through complex processes of authentication and validation to affect the perceptions and behaviours of employees and impact on organizational outcomes.

APPENDIX 1

INTERVIEW SCHEDULE FOR FIELDWORK

Biodata

Sex: Time with SPDC: Age:

Job description/ Title: SG:

Educational qualifications:

Organizational values

What are SPDCs core values?

How did you learn of these values?

How would you describe SPDC / and its staff displays its core values?

What do you think has been the most effective way these values have been disseminated?

Do you feel there is congruence between your values and the organizational values?

Identity Claims

Do you believe that SPDC has a unique identity?

How would you describe this identity?

Do you feel most employees share this identity?

What symbols or attributes do you believe most closely defines this identity?

Do you receive any feedback on outsider's perception of the organizations identity?

Socialisation practices

Does SPDC have any distinctive socialization practices?

Do staffs engage in any ceremonies and practices that increase or foster a sense of organizational identity?

Are staffs encouraged to engage with each other outside the work environment?

Do you feel most of your close associates outside of work are directly related to the work environment?

Have formal or informal socialisation practices been most effective in getting you acquainted with the organizational values? Could you elaborate with some personal examples?

Did you have to learn any new behaviours or attitudes in order to accept SPDC's new identity?

Role definition

How long have you been in your current role?

Did you specifically request to take up this role?

How clearly is your role in the organization defined? Could you elaborate?

Do you have any input in defining the parameters of your role? Task and targets?

To what extent do you identify with your role? Does your role define who you are as a person?

Do you feel there is any ambiguity and need further clarification on what you need to deliver and when?

Do you think your job role can be easily assessed and your performance evaluated by your superiors?

Do you always make decisions based on your perceptions of the organizational values?

Do you identify more with your work role than your other societal roles?

Is your role in the organization very important to your sense of self?

Do you perceive that your work related contacts are more important than non-work related contacts?

Do you feel that there is a clear demarcation between your work and non-work self?

Are you the same person either at work or out of work?

Inter-group dynamics

How would you describe SPDC's organizational culture?

Does SPDC culture encourage teams to share information and resources?

Do you belong to any knowledge sharing network or have you used any such network?

Do you use the information sharing resources provided by the organization?

Do you believe your team has a shared value orientation and purpose?

What attributes differentiate your team from others?

Do you support other teams as part of your role in the organization?

Are you aware of circumstances when intergroup conflict has arisen? Give examples?

Human Resource Processes

What is your understanding of the role of HR in SPDC?

How would you describe the culture in SPDC?

Do you think that the recruitment strategy utilised in SPDC ensures that staff selected fit in easily into the existing culture?

Have you benefited from learning that emphasised SPDC values and how to apply them in the workplace? Elaborate.

Are you rewarded for living the SPDC values?

Are there consequences for not living the SPDC values?

Do you think the HR policies and guidelines ensure that SPDC values are maintained even in non- work environments?

How do you understand the concept of diversity and inclusiveness as it applies to SPDC?

Do you have any concerns regarding diversity and inclusiveness in SPDC?

Do you perceive any limitations to your achieving your potential within the organization, even if you aspire to be the MD?

Have you ever thought about leaving SPDC? If yes, what prompted those thoughts?

Under what circumstances would you quit SPDC?

Do you think the identity SPDC portrays is supported by her culture?

Would you recommend SPDC to friends and relatives as a place of work?

Communication

Is SPDC is effective in communicating who it is and what it does to all its stakeholders?

What different means are used to facilitate this communication?

Does SPDC communications strategy allow room for feedback from other stakeholders?

How does SPDC communication help it to manage both internal and external stakeholders?

Do you think SPDC communications reflects the realities of SPDC organizational life?

Who do you think are SPDCs key stakeholders?

Do you see one of your roles as a stakeholder in SPDC? Are you a multiple stakeholder in SPDC?

Are there any events in SPDCs past or present that has caused you some discomfort and you would rather forget / dissociate yourself from?

Has the recent transformation effected any changes in SPDCs culture?

Do you think that the identity claims of the organization have changed significantly post SOFu?

APPENDIX 2

LIST OF INTERVIEWEES - ANONYMISED

Pseudonym	Sex	Age	Modified Position Title	SG	Tenure
LPD	F	36	Principal SAP Super User	3	6
JDJ	F	49	Help Desk	4	2
IOA	F	30	SA Servers	6	3
ULA	M	34	Reservoir Engineer	4	6
TOA	M	39	Leadership Learning	5	3
PA	M	54	Head Marine Logistics	3	14
NOA	M	33	Reservoir Engineer, Surveillance	4	6
BBA	M	48	Community Relation Officer	6	26
OA	M	39	Communication & Change Advisor	3	3
ETA	M	41	Discipline Portfolio Development, Senior Petrophysicist	3	15
JCA	M	38	Senior Petrophysicists, Value Creation Team	3	12
DOA	M	36	Infrastructure Portfolio Planner	4	11
OAK	M	42	Senior Pipeline Engineer	3	15
GAA	M	37	Support Services Learning Lead	4	8
BIA	M	44	Senior Process Engineer	4	6
KIA	M	35	Hub Associate Civil Engineer	5	5
VEA	M	40	BIM - Subsurface Portfolio	3	14
AA	M	41	Operations Superintendent	2	14
AB	M	34	Petrophysicist	5	5
OOA	F	29	SA Storage	7	2
VEE	M	49	Subsea Engineer	3	25
OOE	M	36	Hub Senior Dredging Engineer	4	12
AOG	M	44	Project Accountant Coordinator	3	12
FG	M	39	SA Storage	4	11
FCI	M	55	Engineering Leader	1	28
FOJ	M	41	Surveyor GIS	4	11
EAM	M	56	Gas Manager	1	24
MAM	M	36	DtL Engineer	5	5
DIN	M	39	Senior Telecoms Engineer	3	11
JHO	F	35	Production Technologist	4	8
MOO	M	35	Librarian	7	14
OTO	M	37	Senior Stratigrapher/Geologist	4	8
MNO	M	51	Project Engineer	3	24
CBO	M	50	Business Improvement Advisor	2	23
HCO	M	42	Principal Front End Engineer	3	16
CIO	M	42	Senior Drilling Engineer	3	15
PNO	M	32	Web Services	6	4
OSO	M	39	Senior Process Engineer	4	14
UJO	M	39	Electrical Engineer	4	8

CIO2	F	32	SA Storage	5	4
SKG	M	34	LEA Leadership / Technical Learning	7	3
EHF	F	32	Business Support	7	3
JJG	M	37	Budgeting, Data & Info Management Officer	7	3
JCL	M	33	Business Support	7	3
QAJ	F	35	Business Support	8	3
EFN	M	38	SA Switching	5	3
KPA	M	33	Help Desk	6	3
VOU	M	49	Head Maintenance Systems	2	24
RNU	M	45	Senior Production Geologist	3	15
AOU	M	35	Reservoir Engineer	5	6
KRW	F	36	Production Geologist	4	6
YYY	M	44	Production Geologist	4	6
CRE	M	38	Senior Project Engineer	4	6
OAS	M	40	Senior Operations Geophysicist, Acquisition	4	3
MAE	M	38	Reservoir Engineer	4	6
UJU	M	37	AM Well Engineering	4	8
RMM	M	35	Major Projects Planner (IAP)	4	8
KN	M	52	Venture Representation Manager	LA	26
CON	M	53	Transformation Manager	LA	26
AOO	M	48	Opportunity Development Centre Manager	LA	15
NO	M	29	Trainee Telecomms Engineer	7	1
EPE	M	36	Associate Production Technologist	5	6
AOA	M	59	IT Learning	4	7
AEO	F	35	Business Improvement Advisor	3	11
BOL	F	43	Communications & Change Manager	1	18
OAO	F	37	Principal Corporate HSE Audit Adviser	5	6
UCO	M	39	Project Engineer, IT	5	6
NA	F	40	Senior Major Projects Planner	3	11

APPENDIX 3

DISTRIBUTION OF EMPLOYEES BY SALARY GROUP, JOB TITLE AND GENDER

Salary Group	Number in Staff list	Typical Job Title	Male/female	% age female in salary group
SE	8	1) Vice-President Technical, Africa (f) 2) Managing Director SPDC 3) Production Director	7/1	12.5%
LB	18	1) External Affairs Director 2) Vice-President Human Resources Africa 3) General Manager, Major Projects	18/0	0%
LA	41	1) Venture Representation Manager 2) General Manager Human Resources 3) Opportunity Development Centre Manager	40/1	2.4%
1	109	1) Gas Sales and Supply Manager 2) Head Economics 3) Health, Safety and Environment Manager	104/5	4.6%
2	255	1) Senior planner and strategist (f) 2) Head Electrical Engineering (f) 3) Head Business control and compliance monitoring	246/9	3.5%
3	718	1) Senior Reservoir Engineer 2) Head, Hydrocarbon Accounting 3) Head, Payment Services(f)	680/38	5.3%
4	907	1) Instrument and Controls team leader 2) Head Electrical Maintenance(f) 3) Senior Mechanical Engineer	858/49	5.4%
5	718	1) Production Operations Team leader 2) Principal Planning Engineer (f) 3) Economic Empowerment Adviser (f)	644/74	10.3%
6	634	1) Field Supervisor 2) Senior Nursing Officer (f) 3) Associate Reservoir Engineer	521/113	17.8%
7	758	1) Graduate trainee Engineer 2) Confidential Assistant/ Secretary 3) Mechanical Supervisor	587/171	22.6%
8	659	1) Production Operations technician	485/174	26.4%

		2) Secretary / Business Support (f) 3) Nursing Officer/ Asst Pharmacist (f)		
9	281	1) Electrical Technician (f) 2) Fire-fighter II 3) Instrument Technician	275/6	2.1%
10	208	1) Production Operations Technician 2) Instrument Technician 3) Gas Operations Technician	203/5	2.4%
11	100	1) Electrical/Mechanical Technicians 2) Fire-fighter I	99/1	1%
12	55	1) Fire-fighter 2) Aviation operator	55/0	0%
Total Staff	5469			

APPENDIX 4

DIFFERENCES BETWEEN THE OLD AND NEW SHELL Pecten LOGO ON SHELL NIGERIA ID CARDS AND DISPLAYS



Clear Logo (Old style)



Blurred or partial logo (new style)

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