

Human Resources

Beginning

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Human resources

Human resources is the set of individuals who make up the workforce of an organization, business sector or an economy. "Human capital" is sometimes used synonymously with human resources, although human capital typically refers to a more narrow view; i.e., the knowledge the individuals embody and can contribute to an organization. Likewise, other terms sometimes used include "manpower", "talent", "labor" or simply "people".

The professional discipline and business function that oversees an organization's human resources is called human resource management (HRM, or simply HR).

Overview

The term in practice

In the corporate vision, employees are viewed as assets to the enterprise, whose value is enhanced by development.^[1] Hence, companies will engage in a barrage of human resource management practices to capitalize on those assets.

In governing human resources, three major trends are typically considered:

1. **Demographics:** the characteristics of a population/workforce, for example, age, gender or social class. This type of trend may have an effect in relation to pension offerings, insurance packages etc.
2. **Diversity:** the variation within the population/workplace. Changes in society now mean that a larger proportion of organizations are made up of "baby-boomers" or older employees in comparison to thirty years ago. Advocates of "workplace diversity" advocate an employee base that is a mirror reflection of the make-up of society insofar as race, gender, sexual orientation etc.
3. **Skills and qualifications:** as industries move from manual to more managerial professions so does the need for more highly skilled graduates. If the market is "tight" (i.e. not enough staff for the jobs), employers must compete for employees by offering financial rewards, community investment, etc.

In regard to how individuals respond to the changes in a labor market, the following must be understood:

- **Geographical spread:** how far is the job from the individual? The distance to travel to work should be in line with the pay offered, and the transportation and infrastructure of the area also influence who applies for a post.
- **Occupational structure:** the norms and values of the different careers within an organization. Mahoney 1989 developed 3 different types of occupational structure, namely, craft (loyalty to the profession), organization career (promotion through the firm) and unstructured (lower/unskilled workers who work when needed).
- **Generational difference:** different age categories of employees have certain characteristics, for example, their behavior and their expectations of the organization.

Concerns about the terminology

One major concern about considering people as assets or resources is that they will be commoditized and abused. Some analysis suggests that human beings are not "commodities" or "resources", but are creative and social beings in a productive enterprise. The 2000 revision of ISO 9001, in contrast, requires identifying the processes, their sequence and interaction, and to define and communicate responsibilities and authorities. In general, heavily unionised nations such as France and Germany have adopted and encouraged such approaches. Also, in 2001, the International Labour Organization decided to revisit and revise its 1975 Recommendation 150 on Human Resources Development.^[2] One view of these trends is that a strong social consensus on political economy and a good social welfare system facilitates labor mobility and tends to make the entire economy more productive, as labor can develop skills and experience in various ways, and move from one enterprise to another with little controversy or difficulty in adapting.

Another important controversy regards labor mobility and the broader philosophical issue with usage of the phrase "human resources". Governments of developing nations often regard developed nations that encourage immigration or "guest workers" as appropriating human capital that is more rightfully part of the developing nation and required to further its economic growth. Over time, the United Nations have come to more generally support the developing nations' point of view, and have requested significant offsetting "foreign aid" contributions so that a developing nation losing human capital does not lose the capacity to continue to train new people in trades, professions, and the arts.^[3]

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- [2] http://www-ilo-mirror.cornell.edu/public/english/employment/skills/recomm/quest/qr_1b.htm Broken link, needs repair
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Human resource management

Human resource management (HRM, or simply HR) is the management of an organization's workforce, or human resources. It is responsible for the attraction, selection, training, assessment, and rewarding of employees, while also overseeing organizational leadership and culture, and ensuring compliance with employment and labor laws. In circumstances where employees desire and are legally authorized to hold a collective bargaining agreement, HR will typically also serve as the company's primary liaison with the employees' representatives (usually a labor union).

HR is a product of the human relations movement of the early 20th century, when researchers began documenting ways of creating business value through the strategic management of the workforce. The function was initially dominated by transactional work such as payroll and benefits administration, but due to globalization, company consolidation, technological advancement, and further research, HR now focuses on strategic initiatives like mergers and acquisitions, talent management, succession planning, industrial and labor relations, and diversity and inclusion.

In startup companies, HR's duties may be performed by a handful of trained professionals or even by non-HR personnel. In larger companies, an entire functional group is typically dedicated to the discipline, with staff specializing in various HR tasks and functional leadership engaging in strategic decision making across the business. To train practitioners for the profession, institutions of higher education, professional associations, and companies themselves have created programs of study dedicated explicitly to the duties of the function. Academic and practitioner organizations likewise seek to engage and further the field of HR, as evidenced by several field-specific publications.

History

Antecedent theoretical developments

HR spawned from the human relations movement, which began in the early 20th century due to work by Frederick Taylor in lean manufacturing. Taylor explored what he termed "scientific management" (later referred to by others as "Taylorism"), striving to improve economic efficiency in manufacturing jobs. He eventually keyed in on one of the principal inputs into the manufacturing process—labor—sparking inquiry into workforce productivity.^[1]

The movement was formalized following the research of Elton Mayo, whose Hawthorne studies serendipitously documented how stimuli unrelated to financial compensation and working conditions—attention and engagement—yielded more productive workers.^[2] Contemporaneous work by Abraham Maslow, Kurt Lewin, Max Weber, Frederick Herzberg, and David McClelland formed the basis for studies in organizational behavior and organizational theory, giving room for an applied discipline.

Birth and evolution of the discipline

By the time enough theoretical evidence existed to make a business case for strategic workforce management, changes in the business landscape (a la Andrew Carnegie, John Rockefeller) and in public policy (a la Sidney and Beatrice Webb, Franklin D. Roosevelt and the New Deal) had transformed the employer-employee relationship, and the discipline was formalized as "industrial and labor relations". In 1913, one of the oldest known professional HR associations—the Chartered Institute of Personnel and Development—was founded in England as the *Welfare Workers' Association*, then changed its name a decade later to the *Institute of Industrial Welfare Workers*, and again the next decade to *Institute of Labour Management* before settling upon its current name.^[3] Likewise in the United States, the world's first institution of higher education dedicated to workplace studies—the School of Industrial and Labor Relations—was formed at Cornell University in 1945.^[4]

During the latter half of the 20th century, union membership declined significantly, while workforce management continued to expand its influence within organizations. "Industrial and labor relations" began being used to refer specifically to issues concerning collective representation, and many companies began referring to the profession as "personnel administration". In 1948, what would later become the largest professional HR association—the Society for Human Resource Management (SHRM)—was founded as the *American Society for Personnel Administration* (ASPA).^[5]

Nearing the 21st century, advances in transportation and communications greatly facilitated workforce mobility and collaboration. Corporations began viewing employees as assets rather than as cogs in machine. "Human resources management", consequently, became the dominant term for the function—the ASPA even changing its name to SHRM in 1998.^[5] "Human capital management" is sometimes used synonymously with HR, although human capital typically refers to a more narrow view of human resources; i.e., the knowledge the individuals embody and can contribute to an organization. Likewise, other terms sometimes used to describe the field include "organizational management", "manpower management", "talent management", "personnel management", and simply "people management".

In popular media

HR has been depicted in several popular media. On the U.S. television series of *The Office*, HR representative Toby Flenderson is sometimes seen as a nag because he constantly reminds coworkers of company policies and government regulations.^[6] Long-running American comic strip *Dilbert* also frequently portrays sadistic HR policies through character Catbert, the "evil director of human resources".^[7] Additionally, an HR manager is the title character in the 2010 Israeli film *The Human Resources Manager*, while an HR intern is the protagonist in 1999 French film *Ressources humaines*

Practice

Business function

Dave Ulrich lists the functions of HR as: aligning HR and business strategy, re-engineering organization processes, listening and responding to employees, and managing transformation and change.^[8]

In practice, HR is responsible for employee experience during the entire employment lifecycle. It is first charged with attracting the right employees through employer branding. It then must select the right employees through the recruitment process. HR then onboards new hires and oversees their training and development during their tenure with the organization. HR assesses talent through use of performance appraisals and then rewards them accordingly. In fulfillment of the latter, HR may sometimes administer payroll and employee benefits, although such activities are more and more being outsourced, with HR playing a more strategic role. Finally, HR is involved in employee terminations - including resignations, performance-related dismissals, and redundancies.

At the macro-level, HR is in charge of overseeing organizational leadership and culture. HR also ensures compliance with employment and labor laws, which differ by geography, and often oversees health, safety, and security. In circumstances where employees desire and are legally authorized to hold a collective bargaining agreement, HR will typically also serve as the company's primary liaison with the employees' representatives (usually a labor union). Consequently, HR, usually through industry representatives, engages in lobbying efforts with governmental agencies (e.g., in the United States, the United States Department of Labor and the National Labor Relations Board) to further its priorities.

The discipline may also engage in mobility management, especially pertaining to expatriates; and it is frequently involved in the merger and acquisition process. HR is generally viewed as a support function to the business, helping to minimize costs and reduce risk.^[9]

Careers

There are almost half a million HR practitioners in the United States and thousands more worldwide.^[10] The Chief HR Officer is the highest ranking HR executive in most companies and typically reports directly to the Chief Executive Officer and works with the Board of Directors on CEO succession.^{[11][12]}

Within companies, HR positions generally fall into one of two categories: generalist and specialist. Generalists support employees directly with their questions, grievances, and projects. They "may handle all aspects of human resources work, and thus require an extensive range of knowledge. The responsibilities of human resources generalists can vary widely, depending on their employer's needs."^[13] Specialists, conversely, work in a specific HR function. Some practitioners will spend an entire career as either a generalist or a specialist while others will obtain experiences from each and choose a path later. Being an HR manager consistently ranks as one of the best jobs, with a #4 ranking by *CNN Money* in 2006 and a #20 ranking by the same organization in 2009, due to its pay, personal satisfaction, job security, future growth, and benefit to society.^{[14][15]}

Human resource consulting is a related career path where individuals may work as advisers to companies and complete tasks outsourced from companies. In 2007, there were 950 HR consultancies globally, constituting a USD \$18.4 billion market. The top five revenue generating firms were Mercer, Ernst & Young, Deloitte, Watson Wyatt (now part of Towers Watson), Aon (now merged with Hewitt), and PwC consulting.^[16] For 2010, HR consulting was ranked the #43 best job in America by *CNN Money*.^[17]

Education

Higher education

Further information: List of human resource management graduate degree programs

Several universities offer programs of study pertaining to HR and related fields. The School of Industrial and Labor Relations at Cornell University was the world's first school for college-level study in HR.^[18] It continues to offer education at the undergraduate, graduate, and professional levels; and it operates a joint degree program with the Samuel Curtis Johnson Graduate School of Management, which *HR Patriot* termed the "crown jewel for aspiring HR professionals".^[19]

Other universities with entire colleges dedicated to the study of HR include Michigan State University, University of Illinois at Urbana-Champaign, and Renmin University of China. Dozens of other universities house departments and institutes related to the field, either within a business school or in another college.



The School of Industrial and Labor Relations at Cornell University was the world's first school for college-level study in HR.

Professional associations

HR education also comes by way of professional associations, which offer training and certification. The Society for Human Resource Management, which is based in the United States, is the largest professional association dedicated to HR,^[10] with over 250,000 members in 140 countries.^[20] It offers a suite of Professional in Human Resources (PHR) certifications through its HR Certification Institute. The Chartered Institute of Personnel and Development, based in England, is the oldest professional HR association, with its predecessor institution being founded in 1919.

Several associations also serve niches within HR. The Institute of Recruiters (IOR) is a recruitment professional association, offering members education, support and training.^[21] WorldatWork focuses on "total rewards" (i.e., compensation, benefits, work life, performance, recognition, and career development), offering several certifications and training programs dealing with remuneration and work-life balance. Other niche associations include the American Society for Training & Development and Recognition Professionals International.

Publications

Academic and practitioner publications dealing exclusively with HR:

- *Cornell HR Review*
- *HR Magazine* (SHRM)
- *Human Resource Management* (John Wiley & Sons)
- *Human Resource Management Review* (Elsevier)
- *International Journal of Human Resource Management* (Taylor & Francis)
- *Perspectives on Work* (LERA)

Related publications:

- *Academy of Management Journal*
- *Academy of Management Review*
- *Administrative Science Quarterly* (Samuel Curtis Johnson Graduate School of Management)

- *Organization Science* (INFORMS)

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Management

Management in all business and organizational activities is the act of getting people together to accomplish desired goals and objectives using available resources efficiently and effectively. Management comprises planning, organizing, staffing, leading or directing, and controlling an organization (a group of one or more people or entities) or effort for the purpose of accomplishing a goal. Resourcing encompasses the deployment and manipulation of human resources, financial resources, technological resources and natural resources.

Since organizations can be viewed as systems, management can also be defined as human action, including design, to facilitate the production of useful outcomes from a system. This view opens the opportunity to 'manage' oneself, a pre-requisite to attempting to manage others.

History

The verb *manage* comes from the Italian *maneggiare* (to handle — especially tools), which in turn derives from the Latin *manus* (hand). The French word *mesnagement* (later *ménagement*) influenced the development in meaning of the English word *management* in the 17th and 18th centuries.^[1]

Some definitions of management are:

- Organization and coordination of the activities of an enterprise in accordance with certain policies and in achievement of clearly defined objectives. Management is often included as a factor of production along with machines, materials and money. According to the management guru Peter Drucker (1909–2005), the basic task of a management is twofold: marketing and innovation.
- Directors and managers have the power and responsibility to make decisions to manage an enterprise when given the authority by the shareholders. As a discipline, management comprises the interlocking functions of formulating corporate policy and organizing, planning, controlling, and directing the firm's resources to achieve the policy's objectives. The size of management can range from one person in a small firm to hundreds or thousands of managers in multinational companies. In large firms the board of directors formulates the policy which is implemented by the chief executive officer.

Theoretical scope

At first, one views management functionally, such as measuring quantity, adjusting plans, meeting goals. This applies even in situations planning does not take place. From this perspective, Henri Fayol (1841–1925)^[2] considers management to consist of six functions: forecasting, planning, organizing, commanding, coordinating and controlling. He was one of the most influential contributors to modern concepts of management.

Another way of thinking, Mary Parker Follett (1868–1933), defined management as "the art of getting things done through people". She described management as philosophy.^[3]

Some people, however, find this definition useful but far too narrow. The phrase "management is what managers do" occurs widely, suggesting the difficulty of defining management, the shifting nature of definitions and the connection of managerial practices with the existence of a managerial cadre or class.

One habit of thought regards management as equivalent to "business administration" and thus excludes management in places outside commerce, as for example in charities and in the public sector. More realistically, however, every organization must manage its work, people, processes, technology, etc. to maximize effectiveness. Nonetheless, many people refer to university departments which teach management as "business schools." Some institutions (such as the Harvard Business School) use that name while others (such as the Yale School of Management) employ the more inclusive term "management."

English speakers may also use the term "management" or "the management" as a collective word describing the managers of an organization, for example of a corporation. Historically this use of the term was often contrasted with the term "Labor" referring to those being managed.

Nature of managerial work

In for-profit work, management has as its primary function the satisfaction of a range of stakeholders. This typically involves making a profit (for the shareholders), creating valued products at a reasonable cost (for customers) and providing rewarding employment opportunities (for employees). In nonprofit management, add the importance of keeping the faith of donors. In most models of management/governance, shareholders vote for the board of directors, and the board then hires senior management. Some organizations have experimented with other methods (such as employee-voting models) of selecting or reviewing managers; but this occurs only very rarely.

In the public sector of countries constituted as representative democracies, voters elect politicians to public office. Such politicians hire many managers and administrators, and in some countries like the United States political appointees lose their jobs on the election of a new president/governor/mayor.

Historical development

Difficulties arise in tracing the history of management. Some see it (by definition) as a late modern (in the sense of late modernity) conceptualization. On those terms it cannot have a pre-modern history, only harbingers (such as stewards). Others, however, detect management-like-thought back to Sumerian traders and to the builders of the pyramids of ancient Egypt. Slave-owners through the centuries faced the problems of exploiting/motivating a dependent but sometimes unenthusiastic or recalcitrant workforce, but many pre-industrial enterprises, given their small scale, did not feel compelled to face the issues of management systematically. However, innovations such as the spread of Arabic numerals (5th to 15th centuries) and the codification of double-entry book-keeping (1494) provided tools for management assessment, planning and control.

Given the scale of most commercial operations and the lack of mechanized record-keeping and recording before the industrial revolution, it made sense for most owners of enterprises in those times to carry out management functions by and for themselves. But with growing size and complexity of organizations, the split between owners (individuals, industrial dynasties or groups of shareholders) and day-to-day managers (independent specialists in planning and control) gradually became more common.

Early writing

While management has been present for millennia, several writers have created a background of works that assisted in modern management theories.^[4]

Sun Tzu's *The Art of War*

Written by Chinese general Sun Tzu in the 6th century BC, *The Art of War* is a military strategy book that, for managerial purposes, recommends being aware of and acting on strengths and weaknesses of both a manager's organization and a foe's.^[4]

Chanakya's Arthashastra

Chanakya wrote the Arthashastra around 300BC in which various strategies, techniques and management theories were written which gives an account on the management of empires, economy and family. The work is often compared to the later works of Machiavelli.

Niccolò Machiavelli's *The Prince*

Believing that people were motivated by self-interest, Niccolò Machiavelli wrote *The Prince* in 1513 as advice for the city of Florence, Italy.^[5] Machiavelli recommended that leaders use fear—but not hatred—to maintain control.

Adam Smith's *The Wealth of Nations*

Written in 1776 by Adam Smith, a Scottish moral philosopher, *The Wealth of Nations* aims for efficient organization of work through Specialization of labor.^[5] Smith described how changes in processes could boost productivity in the manufacture of pins. While individuals could produce 200 pins per day, Smith analyzed the steps involved in manufacture and, with 10 specialists, enabled production of 48,000 pins per day.^[5]

19th century

Classical economists such as Adam Smith (1723–1790) and John Stuart Mill (1806–1873) provided a theoretical background to resource-allocation, production, and pricing issues. About the same time, innovators like Eli Whitney (1765–1825), James Watt (1736–1819), and Matthew Boulton (1728–1809) developed elements of technical production such as standardization, quality-control procedures, cost-accounting, interchangeability of parts, and work-planning. Many of these aspects of management existed in the pre-1861 slave-based sector of the US economy. That environment saw 4 million people, as the contemporary usages had it, "managed" in profitable quasi-mass production.

20th century

By about 1900 one finds managers trying to place their theories on what they regarded as a thoroughly scientific basis (see scientism for perceived limitations of this belief). Examples include Henry R. Towne's *Science of management* in the 1890s, Frederick Winslow Taylor's *The Principles of Scientific Management* (1911), Frank and Lillian Gilbreth's *Applied motion study* (1917), and Henry L. Gantt's charts (1910s). J. Duncan wrote the first college management textbook in 1911. In 1912 Yoichi Ueno introduced Taylorism to Japan and became first management consultant of the "Japanese-management style". His son Ichiro Ueno pioneered Japanese quality assurance.

The first comprehensive theories of management appeared around 1920. The Harvard Business School offered the first Master of Business Administration degree (MBA) in 1921. People like Henri Fayol (1841–1925) and Alexander Church described the various branches of management and their inter-relationships. In the early 20th century, people like Ordway Tead (1891–1973), Walter Scott and J. Mooney applied the principles of psychology to management, while other writers, such as Elton Mayo (1880–1949), Mary Parker Follett (1868–1933), Chester Barnard (1886–1961), Max Weber (1864–1920), Rensis Likert (1903–1981), and Chris Argyris (1923 -) approached the phenomenon of management from a sociological perspective.

Peter Drucker (1909–2005) wrote one of the earliest books on applied management: *Concept of the Corporation* (published in 1946). It resulted from Alfred Sloan (chairman of General Motors until 1956) commissioning a study of the organisation. Drucker went on to write 39 books, many in the same vein.

H. Dodge, Ronald Fisher (1890–1962), and Thornton C. Fry introduced statistical techniques into management-studies. In the 1940s, Patrick Blackett combined these statistical theories with microeconomic theory and gave birth to the science of operations research. Operations research, sometimes known as "management science" (but distinct from Taylor's scientific management), attempts to take a scientific approach to solving management problems, particularly in the areas of logistics and operations.

Some of the more recent developments include the Theory of Constraints, management by objectives, reengineering, Six Sigma and various information-technology-driven theories such as agile software development, as well as group management theories such as Cog's Ladder.

As the general recognition of managers as a class solidified during the 20th century and gave perceived practitioners of the art/science of management a certain amount of prestige, so the way opened for popularised systems of management ideas to peddle their wares. In this context many management fads may have had more to do with pop psychology than with scientific theories of management.

Towards the end of the 20th century, business management came to consist of six separate branches, namely:

- Human resource management
- Operations management or production management
- Strategic management
- Marketing management
- Financial management
- Information technology management responsible for management information systems

21st century

In the 21st century observers find it increasingly difficult to subdivide management into functional categories in this way. More and more processes simultaneously involve several categories. Instead, one tends to think in terms of the various processes, tasks, and objects subject to management.

Branches of management theory also exist relating to nonprofits and to government: such as public administration, public management, and educational management. Further, management programs related to civil-society organizations have also spawned programs in nonprofit management and social entrepreneurship.

Note that many of the assumptions made by management have come under attack from business ethics viewpoints, critical management studies, and anti-corporate activism.

As one consequence, workplace democracy has become both more common, and more advocated, in some places distributing all management functions among the workers, each of whom takes on a portion of the work. However, these models predate any current political issue, and may occur more naturally than does a command hierarchy. All management to some degree embraces democratic principles in that in the long term workers must give majority support to management; otherwise they leave to find other work, or go on strike. Despite the move toward workplace democracy, command-and-control organization structures remain commonplace and the *de facto* organization structure. Indeed, the entrenched nature of command-and-control can be seen in the way that recent layoffs have been conducted with management ranks affected far less than employees at the lower levels. In some cases, management has even rewarded itself with bonuses after laying off level workers.^[6]

According to leading leadership academic Manfred F.R. Kets de Vries, it's almost inevitable these days that there will be some personality disorders in a senior management team.^[7]

Topics

Basic functions

Management operates through various functions, often classified as planning, organizing, staffing, leading/directing, controlling/monitoring and motivation.

- **Planning:** Deciding what needs to happen in the future (today, next week, next month, next year, over the next five years, etc.) and generating plans for action.
- **Organizing:** (Implementation) pattern of relationships among workers, making optimum use of the resources required to enable the successful carrying out of plans.
- **Staffing:** Job analysis, recruitment and hiring for appropriate jobs.
- **Leading/directing:** Determining what needs to be done in a situation and getting people to do it.
- **Controlling/monitoring:** Checking progress against plans.
- **Motivation:** Motivation is also a kind of basic function of management, because without motivation, employees cannot work effectively. If motivation does not take place in an organization, then employees may not contribute to the other functions (which are usually set by top-level management).

Basic roles

- **Interpersonal:** roles that involve coordination and interaction with employees.
- **Informational:** roles that involve handling, sharing, and analyzing information.
- **Decisional:** roles that require decision-making.

Management skills

- **Political:** used to build a power base and establish connections.
- **Conceptual:** used to analyze complex situations.
- **Interpersonal:** used to communicate, motivate, mentor and delegate.
- **Diagnostic:** the ability to visualise most appropriate response to a situation .

[8]

Formation of the business policy

- The mission of the business is the most obvious purpose—which may be, for example, to make soap.
- The vision of the business reflects its aspirations and specifies its intended direction or future destination.
- The objectives of the business refers to the ends or activity at which a certain task is aimed.
- The business's policy is a guide that stipulates rules, regulations and objectives, and may be used in the managers' decision-making. It must be flexible and easily interpreted and understood by all employees.
- The business's strategy refers to the coordinated plan of action that it is going to take, as well as the resources that it will use, to realize its vision and long-term objectives. It is a guideline to managers, stipulating how they ought to allocate and utilize the factors of production to the business's advantage. Initially, it could help the managers decide on what type of business they want to form.

Implementation of policies and strategies

- All policies and strategies must be discussed with all managerial personnel and staff.
- Managers must understand where and how they can implement their policies and strategies.
- A plan of action must be devised for each department.
- Policies and strategies must be reviewed regularly.
- Contingency plans must be devised in case the environment changes.
- Assessments of progress ought to be carried out regularly by top-level managers.
- A good environment and team spirit is required within the business.
- The missions, objectives, strengths and weaknesses of each department must be analysed to determine their roles in achieving the business's mission.
- The forecasting method develops a reliable picture of the business's future environment.
- A planning unit must be created to ensure that all plans are consistent and that policies and strategies are aimed at achieving the same mission and objectives.

All policies must be discussed with all managerial personnel and staff that is required in the execution of any departmental policy.

- Organizational change is strategically achieved through the implementation of the eight-step plan of action established by John P. Kotter: Increase urgency, get the vision right, communicate the buy-in, empower action, create short-term wins, don't let up, and make change stick.^[9]

Policies and strategies in the planning process

- They give mid- and lower-level managers a good idea of the future plans for each department in an organization.
- A framework is created whereby plans and decisions are made.
- Mid- and lower-level management may add their own plans to the business's strategic ones.

Levels of management

Most organizations have three management levels: first-level, middle-level, and top-level managers. These managers are classified in a hierarchy of authority, and perform different tasks. In many organizations, the number of managers in every level resembles a pyramid. Each level is explained below in specifications of their different responsibilities and likely job titles.^[10]

Top-level managers

Consists of board of directors, president, vice-president, CEOs, etc. They are responsible for controlling and overseeing the entire organization. They develop goals, strategic plans, company policies, and make decisions on the direction of the business. In addition, top-level managers play a significant role in the mobilization of outside resources and are accountable to the shareholders and general public.

According to Lawrence S. Kleiman, the following skills are needed at the top managerial level.^[11]

- Broadened understanding of how: competition, world economies, politics, and social trends effect organizational effectiveness .

Middle-level managers

Consist of general managers, branch managers and department managers. They are accountable to the top management for their department's function. They devote more time to organizational and directional functions. Their roles can be emphasized as executing organizational plans in conformance with the company's policies and the objectives of the top management, they define and discuss information and policies from top management to lower management, and most importantly they inspire and provide guidance to lower level managers towards better performance. Some of their functions are as follows:

- Designing and implementing effective group and intergroup work and information systems.
- Defining and monitoring group-level performance indicators.
- Diagnosing and resolving problems within and among work groups.
- Designing and implementing reward systems supporting cooperative behavior.

First-level managers

Consist of supervisors, section leads, foremen, etc. They focus on controlling and directing. They usually have the responsibility of assigning employees tasks, guiding and supervising employees on day-to-day activities, ensuring quality and quantity production, making recommendations, suggestions, and upchanneling employee problems, etc. First-level managers are role models for employees that provide:

- Basic supervision.
- Motivation.
- Career planning.
- Performance feedback.

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Leadership

Leadership has been described as "a process of social influence in which one person can enlist the aid and support of others in the accomplishment of a common task".^[1] Other in-depth definitions of leadership have also emerged.

Theories

Leadership is "organizing a group of people to achieve a common goal". The leader may or may not have any formal authority. Students of leadership have produced theories involving traits,^[2] situational interaction, function, behavior, power, vision and values,^[3] charisma, and intelligence, among others. Somebody whom people follow: somebody who guides or directs others.

Early western history

The search for the characteristics or traits of leaders has been ongoing for centuries. History's greatest philosophical writings from Plato's *Republic* to Plutarch's *Lives* have explored the question "What qualities distinguish an individual as a leader?" Underlying this search was the early recognition of the importance of leadership and the assumption that leadership is rooted in the characteristics that certain individuals possess. This idea that leadership is based on individual attributes is known as the "trait theory of leadership".

The trait theory was explored at length in a number of works in the 19th century. Most notable are the writings of Thomas Carlyle and Francis Galton, whose works have prompted decades of research.^[4] In *Heroes and Hero Worship* (1841), Carlyle identified the talents, skills, and physical characteristics of men who rose to power. In Galton's *Hereditary Genius* (1869), he examined leadership qualities in the families of powerful men. After showing that the numbers of eminent relatives dropped off when moving from first degree to second degree relatives, Galton concluded that leadership was inherited. In other words, leaders were born, not developed. Both of these notable works lent great initial support for the notion that leadership is rooted in characteristics of the leader.

Rise of alternative theories

In the late 1940s and early 1950s, however, a series of qualitative reviews of these studies (e.g., Bird, 1940;^[5] Stogdill, 1948;^[6] Mann, 1959^[7]) prompted researchers to take a drastically different view of the driving forces behind leadership. In reviewing the extant literature, Stogdill and Mann found that while some traits were common across a number of studies, the overall evidence suggested that persons who are leaders in one situation may not necessarily be leaders in other situations. Subsequently, leadership was no longer characterized as an enduring individual trait, as situational approaches (see alternative leadership theories below) posited that individuals can be effective in certain situations, but not others. This approach dominated much of the leadership theory and research for the next few decades.

Reemergence of trait theory

New methods and measurements were developed after these influential reviews that would ultimately reestablish the trait theory as a viable approach to the study of leadership. For example, improvements in researchers' use of the round robin research design methodology allowed researchers to see that individuals can and do emerge as leaders across a variety of situations and tasks.^[8] Additionally, during the 1980s statistical advances allowed researchers to conduct meta-analyses, in which they could quantitatively analyze and summarize the findings from a wide array of studies. This advent allowed trait theorists to create a comprehensive picture of previous leadership research rather than rely on the qualitative reviews of the past. Equipped with new methods, leadership researchers revealed the following:

- Individuals can and do emerge as leaders across a variety of situations and tasks.^[8]
-

- Significant relationships exist between leadership and such individual traits as:
 - intelligence^[9]
 - adjustment^[9]
 - extraversion^[9]
 - conscientiousness^{[10][11][12]}
 - openness to experience^{[11][13]}
 - general self-efficacy^{[14][15]}

While the trait theory of leadership has certainly regained popularity, its reemergence has not been accompanied by a corresponding increase in sophisticated conceptual frameworks.^[16]

Specifically, Zaccaro (2007)^[16] noted that trait theories still:

1. focus on a small set of individual attributes such as Big Five personality traits, to the neglect of cognitive abilities, motives, values, social skills, expertise, and problem-solving skills;
2. fail to consider patterns or integrations of multiple attributes;
3. do not distinguish between those leader attributes that are generally not malleable over time and those that are shaped by, and bound to, situational influences;
4. do not consider how stable leader attributes account for the behavioral diversity necessary for effective leadership.

Attribute pattern approach

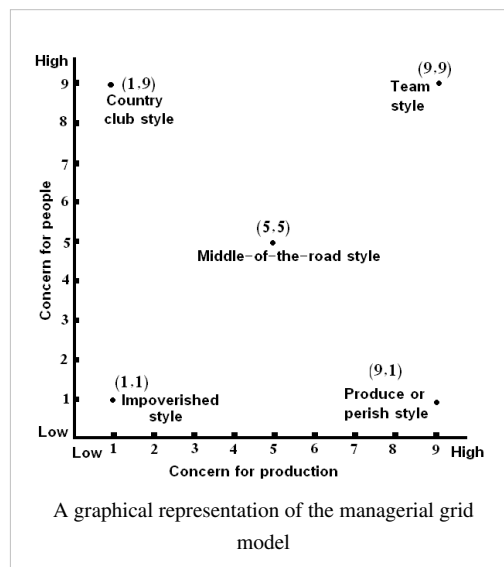
Considering the criticisms of the trait theory outlined above, several researchers have begun to adopt a different perspective of leader individual differences—the leader attribute pattern approach.^{[15][17][18][19][20]} In contrast to the traditional approach, the leader attribute pattern approach is based on theorists' arguments that the influence of individual characteristics on outcomes is best understood by considering the person as an integrated totality rather than a summation of individual variables.^{[19][21]} In other words, the leader attribute pattern approach argues that integrated constellations or combinations of individual differences may explain substantial variance in both leader emergence and leader effectiveness beyond that explained by single attributes, or by additive combinations of multiple attributes.

Behavioral and style theories

In response to the early criticisms of the trait approach, theorists began to research leadership as a set of behaviors, evaluating the behavior of successful leaders, determining a behavior taxonomy, and identifying broad leadership styles.^[22] David McClelland, for example, posited that leadership takes a strong personality with a well-developed positive ego. To lead, self-confidence and high self-esteem are useful, perhaps even essential.^[23]

Kurt Lewin, Ronald Lipitt, and Ralph White developed in 1939 the seminal work on the influence of leadership styles and performance. The researchers evaluated the performance of groups of eleven-year-old boys under different types of work climate. In each, the leader exercised his influence regarding the type of group decision making, praise and criticism (feedback), and the management of the group tasks (project management) according to three styles: authoritarian, democratic, and laissez-faire.^[24]

The managerial grid model is also based on a behavioral theory. The model was developed by Robert Blake and Jane Mouton in 1964 and suggests five different leadership styles, based on the leaders' concern for people and their concern for goal achievement.^[25]



Positive reinforcement

B.F. Skinner is the father of behavior modification and developed the concept of positive reinforcement. Positive reinforcement occurs when a positive stimulus is presented in response to a behavior, increasing the likelihood of that behavior in the future.^[26] The following is an example of how positive reinforcement can be used in a business setting. Assume praise is a positive reinforcer for a particular employee. This employee does not show up to work on time every day. The manager of this employee decides to praise the employee for showing up on time every day the employee actually shows up to work on time. As a result, the employee comes to work on time more often because the employee likes to be praised. In this example, praise (the stimulus) is a positive reinforcer for this employee because the employee arrives at work on time (the behavior) more frequently after being praised for showing up to work on time.

The use of positive reinforcement is a successful and growing technique used by leaders to motivate and attain desired behaviors from subordinates. Organizations such as Frito-Lay, 3M, Goodrich, Michigan Bell, and Emery Air Freight have all used reinforcement to increase productivity.^[27] Empirical research covering the last 20 years suggests that reinforcement theory has a 17 percent increase in performance. Additionally, many reinforcement techniques such as the use of praise are inexpensive, providing higher performance for lower costs.

Situational and contingency theories

Situational theory also appeared as a reaction to the trait theory of leadership. Social scientists argued that history was more than the result of intervention of great men as Carlyle suggested. Herbert Spencer (1884) (and Karl Marx) said that the times produce the person and not the other way around.^[28] This theory assumes that different situations call for different characteristics; according to this group of theories, no single optimal psychographic profile of a leader exists. According to the theory, "what an individual actually does when acting as a leader is in large part dependent upon characteristics of the situation in which he functions."^[29]

Some theorists started to synthesize the trait and situational approaches. Building upon the research of Lewin et al., academics began to normalize the descriptive models of leadership climates, defining three leadership styles and

identifying which situations each style works better in. The authoritarian leadership style, for example, is approved in periods of crisis but fails to win the "hearts and minds" of followers in day-to-day management; the democratic leadership style is more adequate in situations that require consensus building; finally, the laissez-faire leadership style is appreciated for the degree of freedom it provides, but as the leaders do not "take charge", they can be perceived as a failure in protracted or thorny organizational problems.^[30] Thus, theorists defined the style of leadership as contingent to the situation, which is sometimes classified as contingency theory. Four contingency leadership theories appear more prominently in recent years: Fiedler contingency model, Vroom-Yetton decision model, the path-goal theory, and the Hersey-Blanchard situational theory.

The Fiedler contingency model bases the leader's effectiveness on what Fred Fiedler called *situational contingency*. This results from the interaction of leadership style and situational favorability (later called *situational control*). The theory defined two types of leader: those who tend to accomplish the task by developing good relationships with the group (relationship-oriented), and those who have as their prime concern carrying out the task itself (task-oriented).^[31] According to Fiedler, there is no ideal leader. Both task-oriented and relationship-oriented leaders can be effective if their leadership orientation fits the situation. When there is a good leader-member relation, a highly structured task, and high leader position power, the situation is considered a "favorable situation". Fiedler found that task-oriented leaders are more effective in extremely favorable or unfavorable situations, whereas relationship-oriented leaders perform best in situations with intermediate favorability.

Victor Vroom, in collaboration with Phillip Yetton (1973)^[32] and later with Arthur Jago (1988),^[33] developed a taxonomy for describing leadership situations, which was used in a normative decision model where leadership styles were connected to situational variables, defining which approach was more suitable to which situation.^[34] This approach was novel because it supported the idea that the same manager could rely on different group decision making approaches depending on the attributes of each situation. This model was later referred to as situational contingency theory.^[35]

The path-goal theory of leadership was developed by Robert House (1971) and was based on the expectancy theory of Victor Vroom.^[36] According to House, the essence of the theory is "the meta proposition that leaders, to be effective, engage in behaviors that complement subordinates' environments and abilities in a manner that compensates for deficiencies and is instrumental to subordinate satisfaction and individual and work unit performance".^[37] The theory identifies four leader behaviors, *achievement-oriented*, *directive*, *participative*, and *supportive*, that are contingent to the environment factors and follower characteristics. In contrast to the Fiedler contingency model, the path-goal model states that the four leadership behaviors are fluid, and that leaders can adopt any of the four depending on what the situation demands. The path-goal model can be classified both as a contingency theory, as it depends on the circumstances, and as a transactional leadership theory, as the theory emphasizes the reciprocity behavior between the leader and the followers.

The situational leadership model proposed by Hersey and Blanchard suggests four leadership-styles and four levels of follower-development. For effectiveness, the model posits that the leadership-style must match the appropriate level of follower-development. In this model, leadership behavior becomes a function not only of the characteristics of the leader, but of the characteristics of followers as well.^[38]

Functional theory

Functional leadership theory (Hackman & Walton, 1986; McGrath, 1962) is a particularly useful theory for addressing specific leader behaviors expected to contribute to organizational or unit effectiveness. This theory argues that the leader's main job is to see that whatever is necessary to group needs is taken care of; thus, a leader can be said to have done their job well when they have contributed to group effectiveness and cohesion (Fleishman et al., 1991; Hackman & Wageman, 2005; Hackman & Walton, 1986). While functional leadership theory has most often been applied to team leadership (Zaccaro, Rittman, & Marks, 2001), it has also been effectively applied to broader organizational leadership as well (Zaccaro, 2001). In summarizing literature on functional leadership (see Kozlowski

et al. (1996), Zaccaro et al. (2001), Hackman and Walton (1986), Hackman & Wageman (2005), Morgeson (2005)), Klein, Zeigert, Knight, and Xiao (2006) observed five broad functions a leader performs when promoting organization's effectiveness. These functions include environmental monitoring, organizing subordinate activities, teaching and coaching subordinates, motivating others, and intervening actively in the group's work.

A variety of leadership behaviors are expected to facilitate these functions. In initial work identifying leader behavior, Fleishman (1953) observed that subordinates perceived their supervisors' behavior in terms of two broad categories referred to as consideration and initiating structure. Consideration includes behavior involved in fostering effective relationships. Examples of such behavior would include showing concern for a subordinate or acting in a supportive manner towards others. Initiating structure involves the actions of the leader focused specifically on task accomplishment. This could include role clarification, setting performance standards, and holding subordinates accountable to those standards.

Transactional and transformational theories

Eric Berne^[39] first analyzed the relations between a group and its leadership in terms of transactional analysis.

The transactional leader (Burns, 1978)^[40] is given power to perform certain tasks and reward or punish for the team's performance. It gives the opportunity to the manager to lead the group and the group agrees to follow his lead to accomplish a predetermined goal in exchange for something else. Power is given to the leader to evaluate, correct, and train subordinates when productivity is not up to the desired level, and reward effectiveness when expected outcome is reached. Idiosyncrasy Credits, first posited by Edward Hollander (1971) is one example of a concept closely related to transactional leadership.

Emotions

Leadership can be perceived as a particularly emotion-laden process, with emotions entwined with the social influence process.^[41] In an organization, the leader's mood has some effects on his/her group. These effects can be described in three levels:^[42]

1. The mood of individual group members. Group members with leaders in a positive mood experience more positive mood than do group members with leaders in a negative mood. The leaders transmit their moods to other group members through the mechanism of emotional contagion.^[42] Mood contagion may be one of the psychological mechanisms by which charismatic leaders influence followers.^[43]
2. The affective tone of the group. Group affective tone represents the consistent or homogeneous affective reactions within a group. Group affective tone is an aggregate of the moods of the individual members of the group and refers to mood at the group level of analysis. Groups with leaders in a positive mood have a more positive affective tone than do groups with leaders in a negative mood.^[42]
3. Group processes like coordination, effort expenditure, and task strategy. Public expressions of mood impact how group members think and act. When people experience and express mood, they send signals to others. Leaders signal their goals, intentions, and attitudes through their expressions of moods. For example, expressions of positive moods by leaders signal that leaders deem progress toward goals to be good. The group members respond to those signals cognitively and behaviorally in ways that are reflected in the group processes.^[42]

In research about client service, it was found that expressions of positive mood by the leader improve the performance of the group, although in other sectors there were other findings.^[44]

Beyond the leader's mood, her/his behavior is a source for employee positive and negative emotions at work. The leader creates situations and events that lead to emotional response. Certain leader behaviors displayed during interactions with their employees are the sources of these affective events. Leaders shape workplace affective events. Examples – feedback giving, allocating tasks, resource distribution. Since employee behavior and productivity are directly affected by their emotional states, it is imperative to consider employee emotional responses to organizational leaders.^[45] Emotional intelligence, the ability to understand and manage moods and emotions in the

self and others, contributes to effective leadership within organizations.^[44]

Neo-emergent theory

The Neo-emergent leadership theory (from the Oxford school of leadership) espouses that leadership is created through the emergence of information by the leader or other stakeholders, not through the true actions of the leader himself. In other words, the reproduction of information or stories form the basis of the perception of leadership by the majority. It is well known that the great naval hero Lord Nelson often wrote his own versions of battles he was involved in, so that when he arrived home in England he would receive a true hero's welcome. In modern society, the press, blogs and other sources report their own views of a leader, which may be based on reality, but may also be based on a political command, a payment, or an inherent interest of the author, media, or leader. Therefore, it can be contended that the perception of all leaders is created and in fact does not reflect their true leadership qualities at all.

Styles

Leadership style refers to a leader's behavior. It is the result of the philosophy, personality, and experience of the leader. Rhetoric specialists have also developed models for understanding leadership (Robert Hariman, *Political Style*,^[46] Philippe-Joseph Salazar, *L'Hyperpolitique. Technologies politiques De La Domination*^[47]).

Different situations call for different leadership styles. In an emergency when there is little time to converge on an agreement and where a designated authority has significantly more experience or expertise than the rest of the team, an autocratic leadership style may be most effective; however, in a highly motivated and aligned team with a homogeneous level of expertise, a more democratic or laissez-faire style may be more effective. The style adopted should be the one that most effectively achieves the objectives of the group while balancing the interests of its individual members.^[48]

Autocratic or authoritarian style

Under the autocratic leadership style, all decision-making powers are centralized in the leader, as with dictators.

Leaders do not entertain any suggestions or initiatives from subordinates. The autocratic management has been successful as it provides strong motivation to the manager. It permits quick decision-making, as only one person decides for the whole group and keeps each decision to him/herself until he/she feels it needs to be shared with the rest of the group.^[48]

Participative or democratic style

The democratic leadership style consists of the leader sharing the decision-making abilities with group members by promoting the interests of the group members and by practicing social equality.

Laissez-faire or free rein style

A person may be in a leadership position without providing leadership, leaving the group to fend for itself. Subordinates are given a free hand in deciding their own policies and methods.

Narcissistic leadership

Various academics such as Kets de Vries, Maccoby, and Thomas have identified narcissistic leadership as an important and common leadership style.

Toxic leadership

A toxic leader is someone who has responsibility over a group of people or an organization, and who abuses the leader-follower relationship by leaving the group or organization in a worse-off condition than when he/she first found them.

Performance

In the past, some researchers have argued that the actual influence of leaders on organizational outcomes is overrated and romanticized as a result of biased attributions about leaders (Meindl & Ehrlich, 1987). Despite these assertions, however, it is largely recognized and accepted by practitioners and researchers that leadership is important, and research supports the notion that leaders do contribute to key organizational outcomes (Day & Lord, 1988; Kaiser, Hogan, & Craig, 2008). To facilitate successful performance it is important to understand and accurately measure leadership performance.

Job performance generally refers to behavior that is expected to contribute to organizational success (Campbell, 1990). Campbell identified a number of specific types of performance dimensions; leadership was one of the dimensions that he identified. There is no consistent, overall definition of leadership performance (Yukl, 2006). Many distinct conceptualizations are often lumped together under the umbrella of leadership performance, including outcomes such as leader effectiveness, leader advancement, and leader emergence (Kaiser et al., 2008). For instance, leadership performance may be used to refer to the career success of the individual leader, performance of the group or organization, or even leader emergence. Each of these measures can be considered conceptually distinct. While these aspects may be related, they are different outcomes and their inclusion should depend on the applied or research focus.

The Ontological/Phenomenological Model for Leadership

One of the more recent definitions of leadership comes from Werner Erhard, Michael C. Jensen, Steve Zaffron, and Kari Granger who describe leadership as “an exercise in language that results in the realization of a future that wasn’t going to happen anyway, which future fulfills (or contributes to fulfilling) the concerns of the relevant parties...”. This definition ensures that leadership is talking about the future and includes the fundamental concerns of the relevant parties. This differs from relating to the relevant parties as “followers” and calling up an image of a single leader with others following. Rather, a future that fulfills on the fundamental concerns of the relevant parties indicates the future that wasn’t going to happen is not the “idea of the leader”, but rather is what emerges from digging deep to find the underlying concerns of those who are impacted by the leadership.^[49]

Contexts

Organizations

An organization that is established as an instrument or means for achieving defined objectives has been referred to as a *formal organization*. Its design specifies how goals are subdivided and reflected in subdivisions of the organization. Divisions, departments, sections, positions, jobs, and tasks make up this work structure. Thus, the formal organization is expected to behave impersonally in regard to relationships with clients or with its members. According to Weber's definition, entry and subsequent advancement is by merit or seniority. Employees receive a salary and enjoy a degree of tenure that safeguards them from the arbitrary influence of superiors or of powerful clients. The higher one's position in the hierarchy, the greater one's presumed expertise in adjudicating problems that may arise in the course of the work carried out at lower levels of the organization. It is this bureaucratic structure that forms the basis for the appointment of heads or chiefs of administrative subdivisions in the organization and endows them with the authority attached to their position.^[50]

In contrast to the appointed head or chief of an administrative unit, a leader emerges within the context of the *informal organization* that underlies the formal structure. The informal organization expresses the personal objectives and goals of the individual membership. Their objectives and goals may or may not coincide with those of the formal organization. The informal organization represents an extension of the social structures that generally characterize human life — the spontaneous emergence of groups and organizations as ends in themselves.

In prehistoric times, humanity was preoccupied with personal security, maintenance, protection, and survival. Now humanity spends a major portion of waking hours working for organizations. The need to identify with a community that provides security, protection, maintenance, and a feeling of belonging has continued unchanged from prehistoric times. This need is met by the informal organization and its emergent, or unofficial, leaders.^{[51][52]}

Leaders emerge from within the structure of the informal organization. Their personal qualities, the demands of the situation, or a combination of these and other factors attract followers who accept their leadership within one or several overlay structures. Instead of the authority of position held by an appointed head or chief, the emergent leader wields influence or power. Influence is the ability of a person to gain co-operation from others by means of persuasion or control over rewards. Power is a stronger form of influence because it reflects a person's ability to enforce action through the control of a means of punishment.^[51]

A leader is a person who influences a group of people towards a specific result. It is not dependent on title or formal authority. (Elevos, paraphrased from Leaders, Bennis, and Leadership Presence, Halpern & Lubar.) Ogbonnia (2007) defines an effective leader "as an individual with the capacity to consistently succeed in a given condition and be viewed as meeting the expectations of an organization or society." Leaders are recognized by their capacity for caring for others, clear communication, and a commitment to persist.^[53] An individual who is appointed to a managerial position has the right to command and enforce obedience by virtue of the authority of their position. However, she or he must possess adequate personal attributes to match this authority, because authority is only potentially available to him/her. In the absence of sufficient personal competence, a manager may be confronted by an emergent leader who can challenge her/his role in the organization and reduce it to that of a figurehead. However, only authority of position has the backing of formal sanctions. It follows that whoever wields personal influence and power can legitimize this only by gaining a formal position in the hierarchy, with commensurate authority.^[51] Leadership can be defined as one's ability to get others to willingly follow. Every organization needs leaders at every level.^[54]

Management

Over the years the philosophical terminology of "management" and "leadership" have, in the organizational context, been used both as synonyms and with clearly differentiated meanings. Debate is fairly common about whether the use of these terms should be restricted, and generally reflects an awareness of the distinction made by Burns (1978) between "transactional" leadership (characterized by e.g. emphasis on procedures, contingent reward, management by exception) and "transformational" leadership (characterized by e.g. charisma, personal relationships, creativity).^[40]

Group leadership

In contrast to individual leadership, some organizations have adopted group leadership. In this situation, more than one person provides direction to the group as a whole. Some organizations have taken this approach in hopes of increasing creativity, reducing costs, or downsizing. Others may see the traditional leadership of a boss as costing too much in team performance. In some situations, the team members best able to handle any given phase of the project become the temporary leaders. Additionally, as each team member has the opportunity to experience the elevated level of empowerment, it energizes staff and feeds the cycle of success.^[55]

Leaders who demonstrate persistence, tenacity, determination, and synergistic communication skills will bring out the same qualities in their groups. Good leaders use their own inner mentors to energize their team and organizations

and lead a team to achieve success.^[56]

According to the National School Boards Association (USA):^[57]

These Group Leaderships or Leadership Teams have specific characteristics:

Characteristics of a Team

- There must be an awareness of unity on the part of all its members.
- There must be interpersonal relationship. Members must have a chance to contribute, and learn from and work with others.
- The members must have the ability to act together toward a common goal.

Ten characteristics of well-functioning teams:

- Purpose: Members proudly share a sense of why the team exists and are invested in accomplishing its mission and goals.
- Priorities: Members know what needs to be done next, by whom, and by when to achieve team goals.
- Roles: Members know their roles in getting tasks done and when to allow a more skillful member to do a certain task.
- Decisions: Authority and decision-making lines are clearly understood.
- Conflict: Conflict is dealt with openly and is considered important to decision-making and personal growth.
- Personal traits: members feel their unique personalities are appreciated and well utilized.
- Norms: Group norms for working together are set and seen as standards for every one in the groups.
- Effectiveness: Members find team meetings efficient and productive and look forward to this time together.
- Success: Members know clearly when the team has met with success and share in this equally and proudly.
- Training: Opportunities for feedback and updating skills are provided and taken advantage of by team members.

Self-Leadership

Self-Leadership is a process that occurs within an individual, rather than an external act. It is an expression of who we are as people.^[58]

Primates

Mark van Vugt and Anjana Ahuja in *Naturally Selected: The Evolutionary Science of Leadership* present evidence of leadership in nonhuman animals, from ants and bees to baboons and chimpanzees. They suggest that leadership has a long evolutionary history and that the same mechanisms underpinning leadership in humans can be found in other social species, too.^[59] Richard Wrangham and Dale Peterson, in *Demonic Males: Apes and the Origins of Human Violence*, present evidence that only humans and chimpanzees, among all the animals living on Earth, share a similar tendency for a cluster of behaviors: violence, territoriality, and competition for uniting behind the one chief male of the land.^[60] This position is contentious. Many animals beyond apes are territorial, compete, exhibit violence, and have a social structure controlled by a dominant male (lions, wolves, etc.), suggesting Wrangham and Peterson's evidence is not empirical. However, we must examine other species as well, including elephants (which are matriarchal and follow an alpha female), meerkats (who are likewise matriarchal), and many others.

By comparison, bonobos, the second-closest species-relatives of humans, do *not* unite behind the chief male of the land. The bonobos show deference to an alpha or top-ranking female that, with the support of her coalition of other females, can prove as strong as the strongest male. Thus, if leadership amounts to getting the greatest number of followers, then among the bonobos, a female almost always exerts the strongest and most effective leadership. However, not all scientists agree on the allegedly peaceful nature of the bonobo or its reputation as a "hippie chimp".^[61]

Historical views

Sanskrit literature identifies ten types of leaders. Defining characteristics of the ten types of leaders are explained with examples from history and mythology.^[62]

Aristocratic thinkers have postulated that leadership depends on one's "blue blood" or genes. Monarchy takes an extreme view of the same idea, and may prop up its assertions against the claims of mere aristocrats by invoking divine sanction (see the divine right of kings). Contrariwise, more democratically-inclined theorists have pointed to examples of meritocratic leaders, such as the Napoleonic marshals profiting from careers open to talent.

In the autocratic/paternalistic strain of thought, traditionalists recall the role of leadership of the Roman *pater familias*. Feminist thinking, on the other hand, may object to such models as patriarchal and posit against them emotionally-attuned, responsive, and consensual empathetic guidance, which is sometimes associated with matriarchies.

Comparable to the Roman tradition, the views of Confucianism on "right living" relate very much to the ideal of the (male) scholar-leader and his benevolent rule, buttressed by a tradition of filial piety.

Leadership is a matter of intelligence, trustworthiness, humaneness, courage, and discipline . . . Reliance on intelligence alone results in rebelliousness. Exercise of humaneness alone results in weakness. Fixation on trust results in folly. Dependence on the strength of courage results in violence. Excessive discipline and sternness in command result in cruelty. When one has all five virtues together, each appropriate to its function, then one can be a leader. — Sun Tzu^[63]

In the 19th century, the elaboration of anarchist thought called the whole concept of leadership into question. (Note that the *Oxford English Dictionary* traces the word "leadership" in English only as far back as the 19th century.) One response to this denial of élitism came with Leninism, which demanded an élite group of disciplined cadres to act as the vanguard of a socialist revolution, bringing into existence the dictatorship of the proletariat.

Other historical views of leadership have addressed the seeming contrasts between secular and religious leadership. The doctrines of Caesaro-papism have recurred and had their detractors over several centuries. Christian thinking on leadership has often emphasized stewardship of divinely-provided resources—human and material—and their deployment in accordance with a Divine plan. Compare servant leadership.

For a more general take on leadership in politics, compare the concept of the statesperson.

Leadership Myths

Leadership, although largely talked about, has been described as one of the least understood concepts across all cultures and civilizations. Over the years, many researchers have stressed the prevalence of this misunderstanding, stating that the existence of several flawed assumptions, or myths, concerning leadership often interferes with individuals' conception of what leadership is all about (Gardner, 1965; Bennis, 1975).^{[64][65]}

Leadership is innate

According to some, leadership is determined by distinctive dispositional characteristics present at birth (e.g., extraversion; intelligence; ingenuity). However, it is important to note that leadership also develops through hard work and careful observation.^[66] Thus, effective leadership can result from nature (i.e., innate talents) as well as nurture (i.e., acquired skills).

Leadership is possessing power over others

Although leadership is certainly a form of power, it is not demarcated by power *over* people – rather, it is a power *with* people that exists as a reciprocal relationship between a leader and his/her followers (Forsyth, 2009).^[66] Despite popular belief, the use of manipulation, coercion, and domination to influence others is not a requirement for leadership. In actuality, individuals who seek group consent and strive to act in the best interests of others can also become effective leaders (e.g., class president; court judge).

Leaders are positively influential

The validity of the assertion that groups flourish when guided by effective leaders can be illustrated using several examples. For instance, according to Baumeister et al. (1988), the bystander effect (failure to respond or offer assistance) that tends to develop within groups faced with an emergency is significantly reduced in groups guided by a leader.^[67] Moreover, it has been documented that group performance,^[68] creativity,^[69] and efficiency^[70] all tend to climb in businesses with designated managers or CEOs. However, the difference leaders make is **not** always positive in nature. Leaders sometimes focus on fulfilling their own agendas at the expense of others, including his/her own followers (e.g., Pol Pot; Josef Stalin). Leaders who focus on personal gain by employing stringent and manipulative leadership styles often make a difference, but usually do so through negative means.^[71]

Leaders entirely control group outcomes

In Western cultures it is generally assumed that group leaders make *all* the difference when it comes to group influence and overall goal-attainment. Although common, this romanticized view of leadership (i.e., the tendency to overestimate the degree of control leaders have over their groups and their groups' outcomes) ignores the existence of many other factors that influence group dynamics.^[72] For example, group cohesion, communication patterns among members, individual personality traits, group context, the nature or orientation of the work, as well as behavioral norms and established standards influence group functionality in varying capacities. For this reason, it is unwarranted to assume that all leaders are in complete control of their groups' achievements.

All groups have a designated leader

Despite preconceived notions, not all groups need have a designated leader. Groups that are primarily composed of women,^{[73][74]} are limited in size, are free from stressful decision-making,^[75] or only exist for a short period of time (e.g., student work groups; pub quiz/trivia teams) often undergo a diffusion of responsibility, where leadership tasks and roles are shared amongst members (Schmid Mast, 2002; Berdahl & Anderson, 2007; Guastello, 2007).

Group members resist leaders

Although research has indicated that group members' dependence on group leaders can lead to reduced self-reliance and overall group strength,^[66] most people actually prefer to be led than to be without a leader (Berkowitz, 1953).^[76] This "need for a leader" becomes especially strong in troubled groups that are experiencing some sort of conflict. Group members tend to be more contented and productive when they have a leader to guide them. Although individuals filling leadership roles can be a direct source of resentment for followers, most people appreciate the contributions that leaders make to their groups and consequently welcome the guidance of a leader (Stewart & Manz, 1995).^[77]

Action-oriented environments

One approach to team leadership examines action-oriented environments, where effective functional leadership is required to achieve critical or reactive tasks by small teams deployed into the field. In other words, there is leadership of small groups often created to respond to a situation or critical incident.

In most cases these teams are tasked to operate in remote and changeable environments with limited support or backup (action environments). Leadership of people in these environments requires a different set of skills to that of front line management. These leaders must effectively operate remotely and negotiate the needs of the individual, team, and task within a changeable environment. This has been termed *action oriented leadership*. Some examples of demonstrations of action oriented leadership include extinguishing a rural fire, locating a missing person, leading a team on an outdoor expedition, or rescuing a person from a potentially hazardous environment.

Titles emphasizing authority

At certain stages in their development, the hierarchies of social ranks implied different degrees or ranks of leadership in society. Thus a knight led fewer men in general than did a duke; a baronet might in theory control less land than an earl. See peerage for a systematization of this hierarchy, and order of precedence for links to various systems.

In the course of the 18th to 20th centuries, several political operators took non-traditional paths to become dominant in their societies. They or their systems often expressed a belief in strong individual leadership, but existing titles and labels ("King", "Emperor", "President", and so on) often seemed inappropriate, insufficient, or downright inaccurate in some circumstances. The formal or informal titles or descriptions they or their subordinates employ express and foster a general veneration for leadership of the inspired and autocratic variety. The definite article when used as part of the title (in languages that use definite articles) emphasizes the existence of a sole "true" leader.

Critical thought

Noam Chomsky^[78] and others^[79] have brought critical thinking to the very concept of leadership and have provided an analysis that asserts that people abrogate their responsibility to think and will actions for themselves. While the conventional view of leadership is rather satisfying to people who "want to be told what to do", these critics say that one should question why they are being subjected to a will or intellect other than their own if the leader is not a Subject Matter Expert (SME).

The fundamentally anti-democratic nature of the leadership principle is challenged by the introduction of concepts such as autogestion, employeeism, common civic virtue, etc., which stress individual responsibility and/or group authority in the work place and elsewhere by focusing on the skills and attitudes that a person needs in general rather than separating out leadership as the basis of a special class of individuals.

Similarly, various historical calamities are attributed to a misplaced reliance on the principle of leadership.

Varieties of individual power

According to Patrick J. Montana and Bruce H. Charnov, the ability to attain these unique powers is what enables leadership to influence subordinates and peers by controlling organizational resources. The successful leader effectively uses these powers to influence employees, and it is important for leaders to understand the uses of power to strengthen their leadership.

The authors distinguish the following types of organizational power:

- **Legitimate Power** refers to the different types of professional positions within an organization structure that inherit such power (e.g. Manager, Vice President, Director, Supervisor, etc.). These levels of power correspond to the hierarchical executive levels within the organization itself. The higher positions, such as president of the company, have higher power than the rest of the professional positions in the hierarchical executive levels.
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- **Reward Power** is the power given to managers that attain administrative power over a range of rewards (such as raises and promotions). Employees who work for managers desire the reward from the manager and will be influenced by receiving it as a result of work performance.
- **Coercive Power** is the manager's ability to punish an employee. Punishment can be mild, such as a suspension, or serious, such as termination.
- **Expert Power** is attained by the manager due to his or her own talents such as skills, knowledge, abilities, or previous experience. A manager who has this power within the organization may be a very valuable and important manager in the company.
- **Charisma Power:** a manager who has charisma will have a positive influence on workers, and create the opportunity for interpersonal influence.
- **Referent Power** is a power that is gained by association. A person who has power by association is often referred to as an assistant or deputy.
- **Information Power** is gained by a person who has possession of important information at an important time when such information is needed to organizational functioning.^[80]

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Organizational culture

Organizational culture is the collective behavior of humans that are part of an organization, it is also formed by the organization values, visions, norms, working language, systems, and symbols, it includes beliefs and habits.^[1] It is also the pattern of such collective behaviors and assumptions that are taught to new organizational members as a way of perceiving, and even thinking and feeling.^[2] Organizational culture affects the way people and groups interact with each other, with clients, and with stakeholders.^[3]

Ravasi and Schultz (2006) state that organizational culture is a set of shared mental assumptions that guide interpretation and action in organizations by defining appropriate behavior for various situations. At the same time although a company may have "own unique culture", in larger organizations, there is a diverse and sometimes conflicting cultures that co-exist due to different characteristics of the management team.^[4] The organizational culture may also have negative and positive aspects.^[4]

Schein (2009), Deal & Kennedy (2000), Kotter (1992) and many others state that organizations often have very differing cultures as well as subcultures.

Usage

Organizational culture refers to culture in any type of organization be it school, university, not-for-profit groups, government agencies or business entities. In business, terms such as **corporate culture** and **company culture** are sometimes used to refer to a similar concept.^{[5][6]}

Although the idea that the term became known in businesses in the late 80s and early 90s is widespread,^{[7][8]} in fact *corporate culture* was already used by managers and addressed in sociology, cultural studies and organizational theory in the beginning of the 80s.^{[9][10]}

The idea about the culture and overall environment and characteristics of organization, in fact, was first and similarly approached with the notion of organizational climate in the 60s and 70s, and the terms now are somewhat overlapping.^{[11][12]}

Part of or equivalent to

As a part of organization

Culture as a variable takes on the perspective that culture is something that an organization has. Culture is just one entity that adds to the organization as a whole. Culture can be manipulated and altered depending on leadership and members. This perspective believes in a strong culture where everyone buys into it.^[13]

The same as the organization

Culture as Root Metaphor takes the perspective that culture is something the organization is. Culture is basic, but with personal experiences people can view it a little differently. This view of an organization is created through communication and symbols, or competing metaphors.^[13]

The organizational communication perspective on culture views culture in three different ways:

- Traditionalism: Views culture through objective things such as stories, rituals, and symbols
 - Interpretivism: Views culture through a network of shared meanings (organization members sharing subjective meanings)
 - Critical-Interpretivism: Views culture through a network of shared meanings as well as the power struggles created by a similar network of competing meanings
-

Types of organizational cultures

Several methods have been used to classify organizational culture. While there is no single "type" of organizational culture and organizational cultures vary widely from one organization to the next, commonalities do exist and some researchers have developed models to describe different indicators of organizational cultures. Some are described below:

Hofstede

Main: Hofstede's cultural dimensions theory

Hofstede (1980) looked for global differences between over 100,000 of IBM's employees in 50 different countries and three regions of the world, in an attempt to find aspects of culture that might influence business behavior. He suggested about cultural differences existing in regions and nations, and the importance of international awareness and multiculturalism for the own cultural introspection. Cultural differences reflect differences in thinking and social action, and even in "mental programs", a term Hofstede uses for predictable behaviour. Hofstede relates culture to ethnic and regional groups, but also organizations, profession, family, to society and subcultural groups, national political systems and legislation, etc.

Hofstede suggests of the need of changing "mental programs" with changing behaviour first which will lead to value change and he suggests that however certain groups like Jews, Gypsies and Basques have maintained their identity through centuries without changing.

Hofstede demonstrated that there are national and regional cultural groupings that affect the behavior of organizations and identified four dimensions of culture (later five^[14]) in his study of national cultures:

- *Power distance* (Mauk Mulder, 1977) - Different societies find different solutions on social inequality. Although invisible, inside organizations power inequality of the "boss-subordinates relationships" is functional and according to Hofstede reflects the way inequality is addressed in the society. "According to Mulder's Power Distance Reduction theory subordinates will try to reduce the power distance between themselves and their bosses and bosses will try to maintain or enlarge it", but there is also a degree to which a society expects there to be differences in the levels of power. A high score suggests that there is an expectation that some individuals wield larger amounts of power than others. A low score reflects the view that all people should have equal rights.
- *Uncertainty avoidance* is the coping with uncertainty about the future. Society copes with it with technology, law and religion (however different societies have different ways to addressing it), and according to Hofstede organizations deal with it with technology, law and rituals or in two ways - rational and non-rational, where rituals being the non-rational. Hofstede listed as rituals the memos and reports, some parts of the accounting system, large part of the planning and control systems, and the nomination of experts.
- *Individualism vs. collectivism* - disharmony of interests on personal and collective goals (Parsons and Shils, 1951). Hofstede brings that society's expectations of Individualism/Collectivism will be reflected by the employee inside the organization. Collectivist societies will have more emotional dependence of members on their organizations, when in equilibrium - organization is expected to show responsibility on members. Extreme individualism is seen in the US, in fact in US collectivism is seen as "bad". Other cultures and societies than the US will therefore seek to resolve social and organizational problems in ways different than the American one. Hofstede says that capitalist market economy fosters individualism and competition and depends on it but individualism is also related to the development of middle class. Research indicates that some people and cultures might have both high individualism and high collectivism, for example, and someone who highly values duty to his or her group does not necessarily give a low priority to personal freedom and self-sufficiency.
- *Masculinity vs. femininity* - reflect whether certain society is predominantly male or female in terms of cultural values, gender roles and power relations.
- Long- Versus Short-Term Orientation^[15] which he describes as "The long-term orientation dimension can be interpreted as dealing with society's search for virtue. Societies with a short-term orientation generally have a

strong concern with establishing the absolute Truth. They are normative in their thinking. They exhibit great respect for traditions, a relatively small propensity to save for the future, and a focus on achieving quick results. In societies with a long-term orientation, people believe that truth depends very much on situation, context and time. They show an ability to adapt traditions to changed conditions, a strong propensity to save and invest, thriftiness, and perseverance in achieving results." [16]

O'Reilly, Chatman, and Caldwell

Two common models and their associated measurement tools have been developed by O'Reilly *et al.* and Denison.

O'Reilly, Chatman & Caldwell (1991) developed a model based on the belief that cultures can be distinguished by values that are reinforced within organizations. Their Organizational Profile Model (OCP) is a self reporting tool which makes distinctions according seven categories - Innovation, Stability, Respect for People, Outcome Orientation, Attention to Detail, Team Orientation, and Aggressiveness. The model is not intended to measure how organizational culture effects organizational performance, rather it measures associations between the personalities of individuals in the organization and the organization's culture.

Employee values are measured against organizational values to predict employee intentions to stay, and predict turnover.^[17] This is done through instrument like Organizational Culture Profile (OCP) to measure employee commitment.^[17]

Daniel Denison's model (1990) asserts that organizational culture can be described by four general dimensions – Mission, Adaptability, Involvement and Consistency. Each of these general dimensions is further described by the following three sub-dimensions:

- Mission - Strategic Direction and Intent, Goals and Objectives and Vision
- Adaptability - Creating Change, Customer Focus and Organizational Learning
- Involvement - Empowerment, Team Orientation and Capability Development
- Consistency - Core Values, Agreement, Coordination/Integration

Denison's model also allows cultures to be described broadly as externally or internally focused as well as flexible versus stable. The model has been typically used to diagnose cultural problems in organizations.

Deal and Kennedy

Deal and Kennedy (1982) defined organizational culture as *the way things get done around here*.

Deal and Kennedy created a model of culture that is based on 4 different types of organizations. They each focus on how quickly the organization receives feedback, the way members are rewarded, and the level of risks taken.^[18]

Deal and Kennedy's Four Cultures:

- Work-hard, play-hard culture^[18]

This has rapid feedback/reward and low risk Resulting in: Stress coming from quantity of work rather than uncertainty. High-speed action leading to high-speed recreation. Examples: Restaurants, software companies.

- Tough-guy macho culture^[18]

This has rapid feedback/reward and high risk, resulting in the following: Stress coming from high risk and potential loss/gain of reward. Focus on the present rather than the longer-term future. Examples: police, surgeons, sports.

- Process culture^{[19][18]}

This has slow feedback/reward and low risk, resulting in the following: Low stress, plodding work, comfort and security. Stress that comes from internal politics and stupidity of the system. Development of bureaucracies and other ways of maintaining the status quo. Focus on security of the past and of the future. Examples: banks, insurance companies.

- Bet-the-company culture

This has slow feedback/reward and high risk, resulting in the following: Stress coming from high risk and delay before knowing if actions have paid off. The long view is taken, but then much work is put into making sure things happen as planned. Examples: aircraft manufacturers, oil companies.

Edgar Schein

According to Schein (1992), culture is the most difficult organizational attribute to change, outlasting organizational products, services, founders and leadership and all other physical attributes of the organization. His organizational model illuminates culture from the standpoint of the observer, described by three cognitive levels of organizational culture.

At the first and most cursory level of Schein's model is organizational attributes that can be seen, felt and heard by the uninitiated observer - collectively known as *artifacts*. Included are the facilities, offices, furnishings, visible awards and recognition, the way that its members dress, how each person visibly interacts with each other and with organizational outsiders, and even company slogans, mission statements and other operational creeds.

Artifacts comprise the physical components of the organization that relay cultural meaning. Daniel Denison (1990) describes artifacts as the tangible aspects of culture shared by members of an organization. Verbal, behavioral and physical artifacts are the surface manifestations of organizational culture.

Rituals, the collective interpersonal behavior and values as demonstrated by that behavior, constitute the fabric of an organization's culture. The contents of myths, stories, and sagas reveal the history of an organization and influence how people understand what their organization values and believes. Language, stories, and myths are examples of verbal artifacts and are represented in rituals and ceremonies. Technology and art exhibited by members or an organization are examples of physical artifacts.

The next level deals with the professed culture of an organization's members - the *values*. Shared values are individuals' preferences regarding certain aspects of the organization's culture (e.g. loyalty, customer service). At this level, local and personal values are widely expressed within the organization. Basic beliefs and assumptions include individuals' impressions about the trustworthiness and supportiveness of an organization, and are often deeply ingrained within the organization's culture. Organizational behavior at this level usually can be studied by interviewing the organization's membership and using questionnaires to gather attitudes about organizational membership.

At the third and deepest level, the organization's tacit assumptions are found. These are the elements of culture that are unseen and not cognitively identified in everyday interactions between organizational members. Additionally, these are the elements of culture which are often taboo to discuss inside the organization. Many of these 'unspoken rules' exist without the conscious knowledge of the membership. Those with sufficient experience to understand this deepest level of organizational culture usually become acclimatized to its attributes over time, thus reinforcing the invisibility of their existence. Surveys and casual interviews with organizational members cannot draw out these attributes—rather much more in-depth means is required to first identify then understand organizational culture at this level. Notably, culture at this level is the underlying and driving element often missed by organizational behaviorists.

Using Schein's model, understanding paradoxical organizational behaviors becomes more apparent. For instance, an organization can profess highly aesthetic and moral standards at the second level of Schein's model while simultaneously displaying curiously opposing behavior at the third and deepest level of culture. Superficially, organizational rewards can imply one organizational norm but at the deepest level imply something completely different. This insight offers an understanding of the difficulty that organizational newcomers have in assimilating organizational culture and why it takes time to become acclimatized. It also explains why organizational change agents usually fail to achieve their goals: underlying tacit cultural norms are generally not understood before would-be change agents begin their actions. Merely understanding culture at the deepest level may be insufficient to institute cultural change because the dynamics of interpersonal relationships (often under threatening conditions) are

added to the dynamics of organizational culture while attempts are made to institute desired change.

Factors and elements

Gerry Johnson (1988) described a cultural web, identifying a number of elements that can be used to describe or influence organizational culture:

- The Paradigm: What the organization is about, what it does, its mission, its values.
- Control Systems: The processes in place to monitor what is going on. Role cultures would have vast rulebooks. There would be more reliance on individualism in a power culture.
- Organizational Structures: Reporting lines, hierarchies, and the way that work flows through the business.
- Power Structures: Who makes the decisions, how widely spread is power, and on what is power based?
- Symbols: These include organizational logos and designs, but also extend to symbols of power such as parking spaces and executive washrooms.
- Rituals and Routines: Management meetings, board reports and so on may become more habitual than necessary.
- Stories and Myths: build up about people and events, and convey a message about what is valued within the organization.

These elements may overlap. Power structures may depend on control systems, which may exploit the very rituals that generate stories which may not be true.

According to Schein (1992), the two main reasons why cultures develop in organizations is due to external adaptation and internal integration. External adaptation reflects an evolutionary approach to organizational culture and suggests that cultures develop and persist because they help an organization to survive and flourish. If the culture is valuable, then it holds the potential for generating sustained competitive advantages. Additionally, internal integration is an important function since social structures are required for organizations to exist. Organizational practices are learned through socialization at the workplace. Work environments reinforce culture on a daily basis by encouraging employees to exercise cultural values. Organizational culture is shaped by multiple factors, including the following:

- External environment
- Industry
- Size and nature of the organization's workforce
- Technologies the organization uses
- The organization's history and ownership

Communicative Indicators

There are many different types of communication that contribute in creating an organizational culture:^[20]

- Metaphors such as comparing an organization to a machine or a family reveal employees' shared meanings of experiences at the organization.
- Stories can provide examples for employees of how to or not to act in certain situations.
- Rites and ceremonies combine stories, metaphors, and symbols into one. Several different kinds of rites that affect organizational culture:
 - Rites of passage: employees move into new roles
 - Rites of degradation: employees have power taken away from them
 - Rites of enhancement: public recognition for an employee's accomplishments
 - Rites of renewal: improve existing social structures
 - Rites of conflict reduction: resolve arguments between certain members or groups
 - Rites of integration: reawaken feelings of membership in the organization
- Reflexive comments are explanations, justifications, and criticisms of our own actions. This includes:

- Plans: comments about anticipated actions
- Commentaries: comments about action in the present
- Accounts: comments about an action or event that has already occurred

Such comments reveal interpretive meanings held by the speaker as well as the social rules they follow.

- Fantasy Themes are common creative interpretations of events that reflect beliefs, values, and goals of the organization. They lead to rhetorical visions, or views of the organization and its environment held by organization members.

Schema

Schemata (plural of schema) are knowledge structures a person forms from past experiences, allowing the person to respond to similar events more efficiently in the future by guiding the processing of information. A person's schemata are created through interaction with others, and thus inherently involve communication.

Stanley G. Harris (1994) argues that five categories of in-organization schemata are necessary for organizational culture:

- Self-in-organization schemata: a person's concept of oneself within the context of the organization, including her/his personality, roles, and behavior.
- Person-in-organization schemata: a person's memories, impressions, and expectations of other individuals within the organization.
- Organization schemata: a subset of person schemata, a person's generalized perspective on others as a whole in the organization.
- Object/concept-in-organization schemata: knowledge an individual has of organization aspects other than of other persons.
- Event-in-organization schemata: a person's knowledge of social events within an organization.

All of these categories together represent a person's knowledge of an organization. Organizational culture is created when the schematas (schematic structures) of differing individuals across and within an organization come to resemble each other (when any one person's schemata come to resemble another person's schemata because of mutual organizational involvement), primarily done through organizational communication, as individuals directly or indirectly share knowledge and meanings.

Strong/weak cultures

Strong culture is said to exist where staff respond to stimulus because of their alignment to organizational values. In such environments, strong cultures help firms operate like well-oiled machines, cruising along with outstanding execution and perhaps minor tweaking of existing procedures here and there.

Conversely, there is *weak culture* where there is little alignment with organizational values, and control must be exercised through extensive procedures and bureaucracy.

Research shows that organizations that foster strong cultures have clear values that give employees a reason to embrace the culture. A "strong" culture may be especially beneficial to firms operating in the service sector since members of these organizations are responsible for delivering the service and for evaluations important constituents make about firms. Research indicates that organizations may derive the following benefits from developing strong and productive cultures:

- Better aligning the company towards achieving its vision, mission, and goals
- High employee motivation and loyalty
- Increased team cohesiveness among the company's various departments and divisions
- Promoting consistency and encouraging coordination and control within the company
- Shaping employee behavior at work, enabling the organization to be more efficient

Where culture is strong, people do things because they believe it is the right thing to do, and there is a risk of another phenomenon, groupthink. "Groupthink" was described by Irving Janis. He defined it as "a quick and easy way to refer to a mode of thinking that people engage when they are deeply involved in a cohesive in-group, when the members' strivings for unanimity override their motivation to realistically appraise alternatives of action." (Irving Janis, 1972, p. 9) This is a state in which even if they have different ideas, do not challenge organizational thinking, and therefore there is a reduced capacity for innovative thoughts. This could occur, for example, where there is heavy reliance on a central charismatic figure in the organization, or where there is an evangelical belief in the organization's values, or also in groups where a friendly climate is at the base of their identity (avoidance of conflict). In fact, groupthink is very common and happens all the time, in almost every group. Members that are defiant are often turned down or seen as a negative influence by the rest of the group because they bring conflict.

Innovative organizations need individuals who are prepared to challenge the status quo, groupthink or bureaucracy, and need procedures to implement new ideas effectively.

Healthy organizational cultures

Organizations should strive for what is considered a "healthy" organizational culture in order to increase productivity, growth, efficiency and reduce counterproductive behavior and turnover of employees. A variety of characteristics describe a healthy culture, including:

- Acceptance and appreciation for diversity
- Regard for and fair treatment of each employee as well as respect for each employee's contribution to the company
- Employee pride and enthusiasm for the organization and the work performed
- Equal opportunity for each employee to realize their full potential within the company
- Strong communication with all employees regarding policies and company issues
- Strong company leaders with a strong sense of direction and purpose
- Ability to compete in industry innovation and customer service, as well as price
- Lower than average turnover rates (perpetuated by a healthy culture)
- Investment in learning, training, and employee knowledge

Additionally, performance oriented cultures have been shown to possess statistically better financial growth. Such cultures possess high employee involvement, strong internal communications and an acceptance and encouragement of a healthy level of risk-taking in order to achieve innovation. Additionally, organizational cultures that explicitly emphasize factors related to the demands placed on them by industry technology and growth will be better performers in their industries.

According to Kotter and Heskett (1992), organizations with adaptive cultures perform much better than organizations with unadaptive cultures. An adaptive culture translates into organizational success; it is characterized by managers paying close attention to all of their constituencies, especially customers, initiating change when needed, and taking risks. An unadaptive culture can significantly reduce a firm's effectiveness, disabling the firm from pursuing all its competitive/operational options.

Charles Handy

Charles Handy (1976), popularized Roger Harrison (1972) with linking organizational structure to organizational culture. The described four types of culture are:^[21]

- "Power Culture" concentrates power among a small group or a central figure and its control is radiating from its center like a web. Power Cultures need only a few rules and little bureaucracy but swift in decisions can ensue.
- In the "Role Culture" authorities are delegated as such within a highly defined structure. These organizations form hierarchical bureaucracies, where power derives from the personal position and rarely from an expert power. Control is made by procedures (which are highly valued), strict roles descriptions and authority definitions. These organizations have consistent system and are very predictable.
- In a "Task Culture" teams are formed to solve particular problems. So power derives from expertise with team requiring expertise, it is all a small team approach, where people are highly skilled and specialist in their own markets of experience. These cultures often feature the multiple reporting lines of a matrix structure.
- "Person Culture" is formed where all individuals believe themselves superior to the organization. It can become difficult for such organizations to continue to operate, since the concept of an organization suggests that a group of like-minded individuals pursue organizational goals. However some professional partnerships operate well as person cultures, because each partner brings a particular expertise and clientele to the firm.

Kim Cameron and Robert Quinn

See also: Archetype.

Kim Cameron and Robert Quinn (1999) made a research on organizational effectiveness and success. Based on the Competing Values Framework, they developed the Organizational Culture Assessment Instrument that distinguishes four culture types.

Competing values produce polarities like flexibility vs. stability and internal vs. external focus - these two polarities were found to be most important in defining organizational success. The polarities construct a quadrant with four types of culture:

- Clan culture (internal focus and flexible) - A friendly workplace where leaders act like father figures.
- Adhocracy culture (external focus and flexible) - A dynamic workplace with leaders that stimulate innovation.
- Market culture (external focus and controlled) - A competitive workplace with leaders like hard drivers
- Hierarchy culture (internal focus and controlled) - A structured and formalized workplace where leaders act like coordinators.

Cameron & Quinn designated six key aspects that will form organizational culture which can be assessed in the Organizational Culture Assessment Instrument (OCAI) thus producing a mix of the four archetypes of culture. Each organization or team will have its unique mix of culture types.

Clan cultures are most strongly associated with positive employee attitudes and product and service quality, whereas market cultures are most strongly related with innovation and financial effectiveness criteria. The primary belief in market cultures is that clear goals and contingent rewards motivate employees to aggressively perform and meet stakeholders' expectations; a core belief in clan cultures is that the organization's trust in and commitment to employees facilitates open communication and employee involvement. These differing results suggest that it is important for executive leaders to consider the match between strategic initiatives and organizational culture when determining how to embed a culture that produces competitive advantage. By assessing the current organizational culture as well as the preferred situation, the gap and direction to change can be made visible as a first step to changing organizational culture.

Robert A. Cooke

Robert A. Cooke, PhD, defines culture as the behaviors that members believe are required to fit in and meet expectations within their organization. The Organizational Culture Inventory measures twelve behavioral norms that are grouped into three general types of cultures:

- Constructive cultures, in which members are encouraged to interact with people and approach tasks in ways that help them meet their higher-order satisfaction needs.
- Passive/defensive cultures, in which members believe they must interact with people in ways that will not threaten their own security.
- Aggressive/defensive cultures, in which members are expected to approach tasks in forceful ways to protect their status and security.

Constructive cultures

Constructive cultures are where people are encouraged to be in communication with their co-workers, and work as teams, rather than only as individuals. In positions where people do a complex job, rather than something simple like a mechanic one, this sort of culture is an efficient one.^[22]

1. Achievement: completing a task successfully, typically by effort, courage, or skill (pursue a standard of excellence) (explore alternatives before acting) - Based on the need to attain high-quality results on challenging projects, the belief that outcomes are linked to one's effort rather than chance and the tendency to personally set challenging yet realistic goals. People high in this style think ahead and plan, explore alternatives before acting and learn from their mistakes.
2. Self-Actualizing: realization or fulfillment of one's talents and potentialities - considered as a drive or need present in everyone (think in unique and independent ways) (do even simple tasks well) - Based on needs for personal growth, self-fulfillment and the realisation of one's potential. People with this style demonstrate a strong desire to learn and experience things, creative yet realistic thinking and a balanced concern for people and tasks.
3. Humanistic-Encouraging: help others to grow and develop (resolve conflicts constructively) - Reflects an interest in the growth and development of people, a high positive regard for them and sensitivity to their needs. People high in this style devote energy to coaching and counselling others, are thoughtful and considerate and provide people with support and encouragement.
4. Affiliative: treat people as more valuable than things (cooperate with others) - Reflects an interest in developing and sustaining pleasant relationships. People high in this style share their thoughts and feelings, are friendly and cooperative and make others feel a part of things.

Organizations with constructive cultures encourage members to work to their full potential, resulting in high levels of motivation, satisfaction, teamwork, service quality, and sales growth. Constructive norms are evident in environments where quality is valued over quantity, creativity is valued over conformity, cooperation is believed to lead to better results than competition, and effectiveness is judged at the system level rather than the component level. These types of cultural norms are consistent with (and supportive of) the objectives behind empowerment, total quality management, transformational leadership, continuous improvement, re-engineering, and learning organizations.^{[23][24][25]}

Passive/defensive cultures

Norms that reflect expectations for members to interact with people in ways that will not threaten their own security are in the Passive/Defensive Cluster.

The four Passive/Defensive cultural norms are:

- Approval
- Conventional
- Dependent
- Avoidance

In organizations with Passive/Defensive cultures, members feel pressured to think and behave in ways that are inconsistent with the way they believe they should in order to be effective. People are expected to please others (particularly superiors) and avoid interpersonal conflict. Rules, procedures, and orders are more important than personal beliefs, ideas, and judgment. Passive/Defensive cultures experience a lot of unresolved conflict and turnover, and organizational members report lower levels of motivation and satisfaction.

Aggressive/defensive cultures

This style is characterized with more emphasis on task than people. Because of the very nature of this style, people tend to focus on their own individual needs at the expense of the success of the group. The aggressive/defensive style is very stressful, and people using this style tend to make decisions based on status as opposed to expertise.^[26]

1. **Oppositional** - This cultural norm is based on the idea that a need for security that takes the form of being very critical and cynical at times. People who use this style are more likely to question others work, however asking those tough question often leads to a better product. However, those who use this style tend to be over critical and point out others small flaws and use it as a mechanism to put others down.
2. **Power** - This cultural norm is based on the idea that there is a need for prestige and influence. Those who use this style often equate their own self-worth with controlling others. Those who use this style have a tendency to dictate others opposing to guiding others' actions.
3. **Competitive** - This cultural norm is based on the idea of a need to protect one's status. Those who use this style protect their own status by comparing themselves to other individuals and outperforming them. Those who use this style are seekers of appraisal and recognition from others.
4. **Perfectionistic** - This cultural norm is based on the need to attain flawless results. Those who often use this style equate their self-worth with the attainment of extremely high standards. Those who often use this style are always focused on details and place excessive demands on themselves and others.

Organizations with aggressive/defensive cultures encourage or require members to appear competent, controlled, and superior. Members who seek assistance, admit shortcomings, or concede their position are viewed as incompetent or weak. These organizations emphasize finding errors, weeding out "mistakes" and encouraging members to compete against each other rather than competitors. The short-term gains associated with these strategies are often at the expense of long-term growth.^[26]

Entrepreneurial organizational culture

Stephen McGuire (2003) defined and validated a model of organizational culture that predicts revenue from new sources. An Entrepreneurial Organizational Culture (EOC) is a system of shared values, beliefs and norms of members of an organization, including valuing creativity and tolerance of creative people, believing that innovating and seizing market opportunities are appropriate behaviors to deal with problems of survival and prosperity, environmental uncertainty, and competitors' threats, and expecting organizational members to behave accordingly.

Elements

- People and empowerment focused
- Value creation through innovation and change
- Attention to the basics
- Hands-on management
- Doing the right thing
- Freedom to grow and to fail
- Commitment and personal responsibility
- Emphasis on the future^[27]

Personal and organizational culture

Main: Personality psychology, Identity (social science)

Organizational culture is taught to the person as culture is taught by his/her parents thus changing and modeling his/her personal culture.^[4] Indeed employees and people applying for a job are advised to match their "personality to a company's culture" and fit to it.^[28] Some researchers even suggested and have made case studies research on personality changing.^[29]

National and organizational culture

Corporate culture is used to control, coordinate, and integrate of company subsidiaries.^[30] However differences in national cultures exist contributing to differences in the views on the management.^[31] Differences between national cultures are deep rooted values of the respective cultures, and these cultural values can shape how people expect companies to be run, and how relationships between leaders and followers should be resulting to differences between the employer and the employee on expectations. (Geert Hofstede, 1991)

Multiplicity

See also: Biculturalism

Xibao Zhang (2009) carried out an empirical study of culture emergence in the Sino-Western international cross-cultural management (SW-ICCM) context in China. Field data were collected by interviewing Western expatriates and Chinese professionals working in this context, supplemented by non-participant observation and documentary data. The data were then analyzed in grounded fashion to formulate theme-based substantive theories and a formal theory.

The major finding of this study is that human cognition contains three components, or three broad types of "cultural rules of behavior", namely, Values, Expectations, and Ad Hoc Rules, each of which has a mutually conditioning relationship with behavior. The three cognitive components are different in terms of the scope and duration of their mutual shaping with behavior. Values are universal and enduring rules of behavior; Expectations, on the other hand, are context-specific behavioral rules; while Ad Hoc Rules are improvised rules of behavior that the human mind devises contingent upon a particular occasion. Furthermore, they need not be consistent, and frequently are not, among themselves. Metaphorically, they can be compared to a multi-carriage train, which allows for the relative lateral movements by individual carriages so as to accommodate bumps and turns in the tracks. In fact, they provide a "shock-absorber mechanism", so to speak, which enables individuals in SW-ICCM contexts to cope with conflicts in cultural practices and values, and to accommodate and adapt themselves to cultural contexts where people from different national cultural backgrounds work together over extended time. It also provides a powerful framework which explains how interactions by individuals in SW-ICCM contexts give rise to emerging hybrid cultural practices characterized by both stability and change.

One major theoretical contribution of this "multi-carriage train" perspective is its allowance for the existence of inconsistencies among the three cognitive components in their mutual conditioning with behavior. This internal inconsistency view is in stark contrast to the traditional internal consistency assumption explicitly or tacitly held by many culture scholars. The other major theoretical contribution, which follows logically from the first one, is to view culture as an over-arching entity which is made of a multiplicity of Values, Expectations, and Ad Hoc Rules. This notion of one (multiplicity) culture to an organization leads to the classification of culture along its path of emergence into nascent, adolescent, and mature types, each of which is distinct in terms of the pattern of the three cognitive components and behavior.

Impacts

Research suggests that numerous outcomes have been associated either directly or indirectly with organizational culture. A healthy and robust organizational culture may provide various benefits, including the following:

- Competitive edge derived from innovation and customer service
- Consistent, efficient employee performance
- Team cohesiveness
- High employee morale
- Strong company alignment towards goal achievement

Although little empirical research exists to support the link between organizational culture and organizational performance, there is little doubt among experts that this relationship exists. Organizational culture can be a factor in the survival or failure of an organization - although this is difficult to prove considering the necessary longitudinal analyses are hardly feasible. The sustained superior performance of firms like IBM, Hewlett-Packard, Procter & Gamble, and McDonald's may be, at least partly, a reflection of their organizational cultures.

A 2003 Harvard Business School study reported that culture has a significant impact on an organization's long-term economic performance. The study examined the management practices at 160 organizations over ten years and found that culture can enhance performance or prove detrimental to performance. Organizations with strong performance-oriented cultures witnessed far better financial growth. Additionally, a 2002 Corporate Leadership Council study found that cultural traits such as risk taking, internal communications, and flexibility are some of the most important drivers of performance, and may impact individual performance. Furthermore, innovativeness, productivity through people, and the other cultural factors cited by Peters and Waterman (1982) also have positive economic consequences.

Denison, Haaland, and Goelzer (2004) found that culture contributes to the success of the organization, but not all dimensions contribute the same. It was found that the impacts of these dimensions differ by global regions, which suggests that organizational culture is impacted by national culture. Additionally, Clarke (2006) found that a safety climate is related to an organization's safety record.

Organizational culture is reflected in the way people perform tasks, set objectives, and administer the necessary resources to achieve objectives. Culture affects the way individuals make decisions, feel, and act in response to the opportunities and threats affecting the organization.

Adkins and Caldwell (2004) found that job satisfaction was positively associated with the degree to which employees fit into both the overall culture and subculture in which they worked. A perceived mismatch of the organization's culture and what employees felt the culture should be is related to a number of negative consequences including lower job satisfaction, higher job strain, general stress, and turnover intent.

It has been proposed that organizational culture may impact the level of employee creativity, the strength of employee motivation, and the reporting of unethical behavior, but more research is needed to support these conclusions.

Organizational culture also has an impact on recruitment and retention. Individuals tend to be attracted to and remain engaged in organizations that they perceive to be compatible. Additionally, high turnover may be a mediating factor in the relationship between culture and organizational performance. Deteriorating company performance and an unhealthy work environment are signs of an overdue cultural assessment.

Firing on the base of culture

Usually pointed as a source of creating "family like" environment,^{[32][33]} the notion of corporate culture is also used for firing, with this practice started from shoe company Zappos, which granted its fired employees with huge afterwards compensations.^[34] As the corporate culture may mean almost everything,^{[7][8]} firing on the base of culture means the employer does not accept and desire to be inclusive for the culture of the employee and thus the employee "does not fit in corporate culture" (Zappos, Netflix, and many other companies hire and fire based solely on cultural fit^[34]), although this may fall in the ground of discrimination, there is still not law or case law resolving or addressing the question making this practice possible and available for businesses for now. Firing on corporate culture is a recent practice, from the 2008.

Change

When an organization does not possess a healthy culture or requires some kind of organizational culture change, the change process can be daunting. Culture change may be necessary to reduce employee turnover, influence employee behavior, make improvements to the company, refocus the company objectives and/or rescale the organization, provide better customer service, and/or achieve specific company goals and results. Culture change is impacted by a number of elements, including the external environment and industry competitors, change in industry standards, technology changes, the size and nature of the workforce, and the organization's history and management.

There are a number of methodologies specifically dedicated to organizational culture change such as Peter Senge's *Fifth Discipline*. These are also a variety of psychological approaches that have been developed into a system for specific outcomes such as the *Fifth Discipline's* "learning organization" or *Directive Communication's* "corporate culture evolution." Ideas and strategies, on the other hand, seem to vary according to particular influences that affect culture.

Burman and Evans (2008) argue that it is 'leadership' that affects culture rather than 'management', and describe the difference. When one wants to change an aspect of the culture of an organization one has to keep in consideration that this is a long term project. Corporate culture is something that is very hard to change and employees need time to get used to the new way of organizing. For companies with a very strong and specific culture it will be even harder to change.

Prior to a cultural change initiative, a needs assessment is needed to identify and understand the current organizational culture. This can be done through employee surveys, interviews, focus groups, observation, customer surveys where appropriate, and other internal research, to further identify areas that require change. The company must then assess and clearly identify the new, desired culture, and then design a change process.

Cummings & Worley (2004, p. 491 – 492) give the following six guidelines for cultural change, these changes are in line with the eight distinct stages mentioned by Kotter (1995, p. 2):

1. Formulate a clear strategic vision (stage 1, 2, and 3). In order to make a cultural change effective a clear vision of the firm's new strategy, shared values and behaviors is needed. This vision provides the intention and direction for the culture change (Cummings & Worley, 2004, p. 490).
2. Display top-management commitment (stage 4). It is very important to keep in mind that culture change must be managed from the top of the organization, as willingness to change of the senior management is an important indicator (Cummings & Worley, 2004, page 490). The top of the organization should be very much in favor of the change in order to actually implement the change in the rest of the organization. De Caluwé & Vermaak (2004, p

- 9) provide a framework with five different ways of thinking about change.
3. Model culture change at the highest level (stage 5). In order to show that the management team is in favor of the change, the change has to be notable at first at this level. The behavior of the management needs to symbolize the kinds of values and behaviors that should be realized in the rest of the company. It is important that the management shows the strengths of the current culture as well, it must be made clear that the current organizational does not need radical changes, but just a few adjustments. (See for more: Deal & Kennedy, 1982; Sathe, 1983; Schall; 1983; Weick, 1985; DiTomaso, 1987). This process may also include creating committee, employee task forces, value managers, or similar. Change agents are key in the process and key communicators of the new values. They should possess courage, flexibility, excellent interpersonal skills, knowledge of the company, and patience. As McCune (May 1999) puts it, these individual should be catalysts, not dictators.
 4. Modify the organization to support organizational change. The fourth step is to modify the organization to support organizational change. This includes identifying what current systems, policies, procedures and rules need to be changed in order to align with the new values and desired culture. This may include a change to accountability systems, compensation, benefits and reward structures, and recruitment and retention programs to better align with the new values and to send a clear message to employees that the old system and culture are in the past.
 5. Select and socialize newcomers and terminate deviants (stage 7 & 8 of Kotter, 1995, p. 2). A way to implement a culture is to connect it to organizational membership, people can be selected and terminate in terms of their fit with the new culture (Cummings & Worley, 2004, p. 491). Encouraging employee motivation and loyalty to the company is key and will also result in a healthy culture. The company and change managers should be able to articulate the connections between the desired behavior and how it will impact and improve the company's success, to further encourage buy-in in the change process. Training should be provided to all employees to understand the new processes, expectations and systems.
 6. Develop ethical and legal sensitivity. Changes in culture can lead to tensions between organizational and individual interests, which can result in ethical and legal problems for practitioners. This is particularly relevant for changes in employee integrity, control, equitable treatment and job security (Cummings & Worley, 2004, p. 491). It is also beneficial, as part of the change process, to include an evaluation process, conducted periodically to monitor the change progress and identify areas that need further development. This step will also identify obstacles of change and resistant employees and to acknowledge and reward employee improvement, which will also encourage continued change and evolvement. It may also be helpful and necessary to incorporate new change managers to refresh the process. Outside consultants may also be useful in facilitating the change process and providing employee training. Change of culture in the organizations is very important and inevitable. Culture innovations is bound to be because it entails introducing something new and substantially different from what prevails in existing cultures. Cultural innovation^[35] is bound to be more difficult than cultural maintenance. People often resist changes hence it is the duty of the management to convince people that likely gain will outweigh the losses. Besides institutionalization, deification is another process that tends to occur in strongly developed organizational cultures. The organization itself may come to be regarded as precious in itself, as a source of pride, and in some sense unique. Organizational members begin to feel a strong bond with it that transcends material returns given by the organization, and they begin to identify with it. The organization turns into a sort of clan.
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Mergers, organizational culture, and cultural leadership

One of the biggest obstacles in the way of the merging of two organizations is organizational culture. Each organization has its own unique culture and most often, when brought together, these cultures clash. When mergers fail employees point to issues such as identity, communication problems, human resources problems, ego clashes, and inter-group conflicts, which all fall under the category of "cultural differences".

One way to combat such difficulties is through cultural leadership. Organizational leaders must also be cultural leaders and help facilitate the change from the two old cultures into the one new culture. This is done through cultural innovation followed by cultural maintenance.

- Cultural innovation includes:
 - Creating a new culture: recognizing past cultural differences and setting realistic expectations for change
 - Changing the culture: weakening and replacing the old cultures
- Cultural maintenance includes:
 - Integrating the new culture: reconciling the differences between the old cultures and the new one
 - Embodying the new culture: Establishing, affirming, and keeping the new culture

Corporate subcultures

Corporate culture is the total sum of the values, customs, traditions, and meanings that make a company unique. Corporate culture is often called "the character of an organization", since it embodies the vision of the company's founders. The values of a corporate culture influence the ethical standards within a corporation, as well as managerial behavior.^[36]

Senior management may try to determine a *corporate culture*. They may wish to impose corporate values and standards of behavior that specifically reflect the objectives of the organization. In addition, there will also be an extant internal culture within the workforce. Work-groups within the organization have their own behavioral quirks and interactions which, to an extent, affect the whole system. Roger Harrison's four-culture typology, and adapted by Charles Handy, suggests that unlike organizational culture, corporate culture can be 'imported'. For example, computer technicians will have expertise, language and behaviors gained independently of the organization, but their presence can influence the culture of the organization as a whole.

Legal aspects

Corporate culture can be found as a cause of injuries and be a reason for fining companies in US like in the case of U.S. Department of Labor's Mine Safety and Health Administration that fined of \$10,825,368 Performance Coal Co. in April 2010, the largest fine in agency history, following its investigation of explosion at the Upper Big Branch-South Mine, operated by Performance Coal Co., a subsidiary of Massey Energy Co.^[37]

Critical views

Criticism of the usage of the term by managers began already in its emergence in the early 80s.^[10] Most of the criticism comes from the writers in critical management studies who for example express skepticism about the functionalist and unitarist views about culture that are put forward by mainstream management writers. They stress the ways in which these cultural assumptions can stifle dissent management and reproduce propaganda and ideology. They suggest that organizations do not have a single culture and cultural engineering may not reflect the interests of all stakeholders within an organization.

Parker (2000) has suggested that many of the assumptions of those putting forward theories of organizational culture are not new. They reflect a long-standing tension between cultural and structural (or informal and formal) versions of what organizations are. Further, it is reasonable to suggest that complex organizations might have many cultures, and

that such sub-cultures might overlap and contradict each other. The neat typologies of cultural forms found in textbooks rarely acknowledge such complexities, or the various economic contradictions that exist in capitalist organizations.

Among the strongest and widely recognized writers on corporate culture with a long list of articles on leadership, culture, gender and their intersection is Linda Smircich, as a part of the of critical management studies, she criticises theories that attempt to categorize or 'pigeonhole' organizational culture.^{[9][38]} She uses the metaphor of a plant root to represent culture, describing that it drives organizations rather than vice versa. Organizations are the product of organizational culture, we are unaware of how it shapes behavior and interaction (also recognized through Scheins (2002) underlying assumptions) and so how can we categorize it and define what it is?

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Employer branding

Employer brand was first used in the early 1990s to denote an organisation's reputation as an employer.^[1] Since then, it has become widely adopted by the global management community.^{[2][3][4]} Minchington (2005) defines employer brand as "the image of your organisation as a 'great place to work'". **Employer branding** is creating this image.^[5]

Just as a customer brand proposition is used to define a product or service offer, an employee value proposition (EVP) is used to define an organisation's employment offer. Likewise the marketing disciplines associated with branding and brand management have been increasingly applied by the human resources and talent management community to attract, engage and retain talented candidates and employees, in the same way that marketing applies such tools to attracting and retaining clients, customers and consumers.

Origin

The term 'employer brand' was first publicly introduced to a management audience in 1990,^[6] and defined by Simon Barrow, chairman of People in Business, and Tim Ambler, Senior Fellow of London Business School, in the Journal of Brand Management in December 1996.^[7] This academic paper was the first published attempt to 'test the application of brand management techniques to human resource management'. Within this paper, Simon Barrow and Tim Ambler defined the employer brand as: *the package of functional, economic and psychological benefits provided by employment, and identified with the employing company*. By 2001, of 138 leading companies surveyed by the Conference Board in North America, 40% claimed to be actively engaged in some form of employer branding activity.^[8] In 2003, an employer brand survey conducted by the Economist among a global panel of readers revealed a 61% level of awareness of the term 'employer brand' among HR professionals and 41% among non-HR professionals.^[9] The first book on the subject was published in 2005,^[10] and the second in 2006.^[11] In 2008, Jackie Orme, the Director General of the UK Chartered Institute of Personnel Directors confirmed the growing status of the discipline in her opening address to the CIPD annual conference, with the observation that: "When I started out in the profession, nobody talked about employer branding. Now it's absolutely integral to business strategy - resonating well beyond the doors of the HR department".^[12] Similar recognition of the growing importance of employer brand thinking and practice has also been recently in evidence in the USA,^[13] Australasia,^[14] Asia,^{[15][16][17]} and Europe,^{[18][19][20][21]} with the publication of numerous books on the subject.

Employer branding

While the term 'employer brand' denotes what people currently associate with an organisation, employer branding has been defined as the *sum of a company's efforts to communicate to existing and prospective staff what makes it a desirable place to work*,^[22] and the active management of *a company's image as seen through the eyes of its associates and potential hires*.^[23]

Employer brand management

Employer brand management expands the scope of this brand intervention beyond communication to incorporate every aspect of the employment experience, and the people management processes and practices (often referred to as 'touch-points') that shape the perceptions of existing and prospective employees.^[24] In other words, employer brand management addresses the reality of the employment experience and not simply its presentation. By doing so it supports both external recruitment of the right kind of talent sought by an organisation to achieve its goals, and the subsequent desire for effective employee engagement and employee retention.

Employer brand proposition

As for consumer brands, most employer brand practitioners and authors argue that effective employer branding and brand management requires a clear Employer Brand proposition,^[25] or Employee value proposition (EVP). This serves to: define what the organisation would most like to be associated with as an employer; highlight the attributes that differentiate the organisation from other employers; and clarify the 'give and get' of the employment deal (balancing the value that employees are expected to contribute with the value from employment that they can expect in return). This latter aspect of the employer brand proposition is often referred to in the HR literature as the 'psychological contract'.

Employer branding and internal marketing

Internal marketing focuses on communicating the customer brand promise, and the attitudes and behaviours expected from employees to deliver on that promise.^{[26][27]} While it is clearly beneficial to the organisation for employees to understand their role in delivering the customer brand promise,^[28] the effectiveness of internal marketing activities can often be short-lived if the brand values on which the service experience is founded are not experienced by the employees in their interactions with the organisation.^[29] This is the gap that employer brand thinking and practice seeks to address with a more mutually beneficial employment deal / Psychological contract.

Brand-led culture change

Compared with the more typically customer centric focus of Internal marketing, internal branding / brand engagement takes a more 'inside-out', value-based approach to shaping employee perceptions and behaviours, following the lead of the highly influential 'Built to Last: Successful Habits of Visionary Companies' study published in the mid-90's.^[30] This sought to demonstrate that companies with consistent, distinctive and deeply held values tended to outperform those companies with a less clear and articulated ethos. While brand-led culture change is often the stated desire of these programmes their focus on communication-led, marketing methods (however, involving or experiential) has been prone to the same failings of conventional internal marketing.^{[31][32]} As Amazon's founder, Jeff Bezos, asserts: "One of things you find in companies is that once a culture is formed it takes nuclear weaponry to change it".^[33] You cannot simply assert your way to a new culture, no more can you assert your way to a strong brand, it needs to be consistently and continuously shaped and managed, which is one of the primary reasons many organisations have turned from the short term engagement focus of internal branding initiatives to more long term focus of employer brand management.^[34]

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Recruitment

Recruitment refers to the process of attracting, screening, and selecting a qualified person for a job. All companies in any industry can benefit from contingency or retain professional recruiters or outsourcing the process to recruitment agencies.

The recruitment industry exists basically in four forms:

- 1). Employment agencies deal with clerical, trades, temporary and temporary to hire employment opportunities.
- 2). Recruitment websites and job search engines used to gather as many candidates as possible by advertising a position over a wide geographic area. Although thought to be a cost effective alternative, a human resource (HR) department or department manager will spend time outside their normal duties reading and screening resumes. A professional recruiter has the ability to read and screen resumes, talk to potential candidates and deliver a selective group in a timely manner.
- 3). "headhunters" for executive and professional positions. These firms are either contingency or retained. Although advertising is used to keep a flow of candidates these firms rely on networking as their main source of candidates.
- 4). Niche agencies specialize in a particular industrial area of staffing.

Some organizations prefer to utilize employer branding strategy and in-house recruitment instead of recruiting firms. The difference, a recruiting firm is always looking for talent whereas an internal department is focused on filling a single opening. The advantage associated with utilizing a third-party recruiting firm is their ability to know where to find a qualified candidate. Talent Management is a key component to the services a professional recruiting firm can provide.

The stages in recruitment include sourcing candidates by networking, advertising or other methods. Utilizing professional interviewing techniques to understand the candidate's skills but motivations to make a move, screening

potential candidates using testing (skills or personality) is also a popular part of the process. The process is meant to not only evaluate the candidate but also evaluate how the candidate will fit into the organization. The recruiter will meet with the hiring manager to obtain specific position and type information before beginning the process. After the recruiter understands the type of person the company needs, they begin the process of informing their network of the opportunity. Recruiters play an important role by preparing the candidate and company for the interview, providing feedback to both parties and handling salary/benefits negotiations.

Agency types

The recruitment industry is based on the goal of providing a candidate to a client for a price. On one end of the spectrum there are agencies that are paid only if they deliver a candidate that successfully stays with the client beyond the agreed probationary period. On the other end of the spectrum there are agencies that are paid a retainer to focus on a client's needs and achieve milestones in the search for the right candidate, and then again are paid a percentage of the candidate's salary when a candidate is placed and stays with the organization beyond the probationary period. Today's (march 2011) recruitment industry is fairly competitive, therefore agencies have sought out ways to differentiate themselves and add value by focusing on some area of the recruitment life cycle. Here are five types of typical agencies.

Traditional agency

Also known as employment agencies, recruitment agencies have historically had a physical location. A candidate visits a local branch for a short interview and an assessment before being taken onto the agency's books. Recruitment consultants then work to match their pool of candidates to their clients' open positions. Suitable candidates are short-listed and put forward for an interview with potential employers on a contract or direct basis.

Compensation to agencies take several forms, the most popular are:

- A contingency fee paid by the company when an agency introduced candidate accepts a job with the client company. Typical fees range from 15% to 25% based on the candidates first-year base salary (fees as low as 12.5% can be found online). This type of recruitment usually has a rebate guarantee should the candidate fail to perform or leave within a set period of time (often up to a 3 month period and as much as a 100% rebate).
- An advance payment that serves as a retainer, also paid by the company, non-refundable paid in full depending on outcome and success (e.g. 40% up front, 30% in 90 days and the remainder once a search is completed). This form of compensation is generally reserved for high level executive search/headhunters
- Hourly Compensation for temporary workers and projects. A pre-negotiated hourly fee, in which the agency is paid and pays the applicant as a consultant for services as a third party. Many contracts allow a consultant to transition to a full-time status upon completion of a certain number of hours with or without a conversion fee.

Headhunters

A "headhunter" is an industry term for a third-party recruiter who seeks out candidates often when normal recruitment efforts have failed. Headhunters are generally considered more aggressive than in-house recruiters or may have pre-existing industry experience and contacts. They may use advanced sales techniques. They may also purchase expensive lists of names and job titles but more often will generate their own lists. They may arrange a meeting or a formal interview between their client and the candidate and will usually prepare the candidate for the interview, help negotiate the salary and conduct closure to the search. They are frequently members in good standing of industry trade groups and associations. Headhunters will often attend trade shows and other meetings nationally or even internationally that may be attended by potential candidates and hiring managers.

Headhunters are typically small operations that make high margins on candidate placements (sometimes more than 30% of the candidate's annual compensation). Due to their higher costs, headhunters are usually employed to fill senior management and executive level roles. Headhunters are also used to recruit very specialized individuals; for

example, in some fields, such as emerging scientific research areas, there may only be a handful of top-level professionals who are active in the field. In this case, since there are so few qualified candidates, it makes more sense to directly recruit them one-by-one, rather than advertise internationally for candidates. While in-house recruiters tend to attract candidates for specific jobs, headhunters will attract both candidates and actively seek them out as well. To do so, they may network, cultivate relationships with various companies, maintain large databases, purchase company directories or candidate lists and cold call prospective recruits.

Headhunters are increasingly using social media to find and research candidates. This approach is often called social recruiting.

Niche recruiters

'Specialized recruiters' exist to seek staff with a very narrow specialty. Because of their focus, these firms can very often produce superior results due to their ability to channel all of their resources into networking for a very specific skill set. This specialization in staffing allows them to offer more jobs for their specific demographic which in turn attracts more specialized candidates from that specific demographic over time building large proprietary databases. These niche firms tend to be more focused on building ongoing relationships with their candidates as is very common the same candidates are placed many times throughout their careers. Niche firms also develop knowledge on specific employment trends within their industry of focus (e.g. The energy industry) and are able to identify demographic shifts such as aging and its impact on the industry.^[1]

Social recruiting

Social recruiting is the use of social media for recruiting including sites like Facebook, Twitter, and LinkedIn.^{[2] [3]}

Employee referral

An employee referral program is a system where existing employees recommend prospective candidates for the job offered, and if the suggested candidate is hired, the employee who referred receives a cash bonus.^[4]

In some cases the Organization provides the Employee referral bonus only if the referred employee stays with the organization for stipulated time duration (most cases 3 - 6 months). Referral bonus depends on the grade of the referred employee, higher the grade higher the bonus however the method is not used for senior level hiring.

In-house recruitment

Under pressure to reduce costs, both large- and medium-sized employers tend to undertake their own in-house recruitment, using their human resources department, front-line hiring managers and recruitment personnel who handle targeted functions and populations. In addition to coordinating with the agencies mentioned above, in-house recruiters may advertise job vacancies on their own websites, coordinate internal employee referrals, work with external associations, trade groups and/or focus on campus graduate recruitment. Some large employers choose to outsource all or some of their recruitment process (recruitment process outsourcing) however a much more common approach is for employers to introduce referral schemes where employees are encouraged to source new staff from within their own network.

Executive research firms and passive candidate sourcing firms

These firms are the new hybrid firms in the recruitment world able to combine the research aspects (discovering passive candidates) of recruiting and combine them with the ability to make hires for their clients. These firms provide competitive passive candidate intelligence to support companies' recruiting efforts. Normally they will generate varying degrees of candidate information from those people currently engaged in the position a company is looking to fill. These firms usually charge a daily rate or fixed fee. Executive research can help companies uncover names that cannot be found through traditional recruitment methods and will allow human resource managers and

internal recruiters more time to deal with face to face interviews.

Process

Job analysis

The proper start to a recruitment effort is to perform a job analysis, to document the actual or intended requirement of the job to be performed. This information is captured in a job description and provides the recruitment effort with the boundaries and objectives of the search. Often a company will have job descriptions that represent a historical collection of tasks performed in the past. These job descriptions need to be reviewed or updated prior to a recruitment effort to reflect present day requirements. Starting a recruitment with an accurate job analysis and job description ensures the recruitment process effort starts off on a proper track for success.

Sourcing

Sourcing involves 1) advertising, a common part of the recruiting process, often encompassing multiple media, such as the Internet, general newspapers, job ad newspapers, professional publications, window advertisements, job centers, and campus graduate recruitment programs; and 2) recruitment research, which is the proactive identification of passive candidates who are happy in their current positions and are not actively looking to move companies. This initial research for so-called passive candidates, also called name generation, results in a contact information of potential candidates who can then be contacted discreetly to be screened and approached on behalf of an executive search firm or corporate client (see below).

Screening and selection

Suitability for a job is typically assessed by looking for skills, e.g. communication, typing, and computer skills. Qualifications may be shown through résumés, job applications, interviews, educational or professional experience, the testimony of references, or in-house testing, such as for software knowledge, typing skills, numeracy, and literacy, through psychological tests or employment testing. Other resume screening criteria may include length of service, job titles and length of time at a job. In some countries, employers are legally mandated to provide equal opportunity in hiring. Business management software is used by many recruitment agencies to automate the testing process. Many recruiters and agencies are using an applicant tracking system to perform many of the filtering tasks, along with software tools for psychometric testing.

In recent years, the focus of hiring is increasingly shifted from solely the immediate hard skills such as engineering, finances, or accounting, to the longer term soft skills such as communication, team leadership, brand building.^[5]

One major challenge for recruiters is to ensure new hires fit into the company culture, or, at an even more basic level, have rudimentary awareness of basic etiquette skills in a business environment. This soft skills requirement is especially critical for multinationals, where expatriates, local employees, customers, and vendors would need to work together. To ease the situation, recruiters are beginning to adopt the IETTI (pronounced as "ET") standardized image and etiquette certification tool to measure the background soft skills of job-seekers.^[6]

Lateral hiring

"Lateral hiring" refers to a form of recruiting; the term is used with two different, almost opposite meanings. In one meaning, the hiring organization targets employees of another, similar organization, possibly luring them with a better salary and the promise of better career opportunities. An example is the recruiting of a partner of a law firm by another law firm. The new lateral hire then has specific applicable expertise and can make a running start in the new job. In some professional branches such lateral hiring was traditionally frowned upon, but the practice has become increasingly more common. An employee's contract may have a non-compete clause preventing such lateral hiring.

In another meaning, a lateral hire is a newly hired employee who has no prior specific applicable expertise for the new job, and for whom this job move is a radical change of career. An example is the recruiting of a university professor to become chairman of the board of a company.



A British Army etc. recruitment centre in Oxford.

Onboarding

"Onboarding" is a term which describes the process of helping new employees become productive members of an organization. A well-planned introduction helps new employees become fully operational quickly and is often integrated with a new company and environment. Onboarding is included in the recruitment process for retention purposes. Many companies have onboarding campaigns in hopes to retain top talent that is new to the company; campaigns may last anywhere from 1 week to 6 months.

Internet recruitment and websites

Such sites have two main features: job boards and a résumé/curriculum vitae (CV) database. Job boards allow member companies to post job vacancies. Alternatively, candidates can upload a résumé to be included in searches by member companies. Fees are charged for job postings and access to search resumes. Since the late 1990s, the recruitment website has evolved to encompass end-to-end recruitment. Websites capture candidate details and then pool them in client accessed candidate management interfaces (also online). Key players in this sector provide e-recruitment software and services to organizations of all sizes and within numerous industry sectors, who want to e-enable entirely or partly their recruitment process in order to improve business performance.

The online software provided by those who specialize in online recruitment helps organizations attract, test, recruit, employ and retain quality staff with a minimal amount of administration. Online recruitment websites can be very helpful to find candidates that are very actively looking for work and post their resumes online, but they will not attract the "passive" candidates who might respond favorably to an opportunity that is presented to them through other means. Also, some candidates who are actively looking to change jobs are hesitant to put their resumes on the job boards, for fear that their companies, co-workers, customers or others might see their resumes.

Job search engines

The emergence of meta-search engines allows job-seekers to search across multiple websites. Some of these new search engines index and list the advertisements of traditional job boards. These sites tend to aim for providing a "one-stop shop" for job-seekers. However, there are many other job search engines which index solely from employers' websites, choosing to bypass traditional job boards entirely. These vertical search engines allow job-seekers to find new positions that may not be advertised on traditional job boards, and online recruitment websites.

Recruitment Theories

According to Behling and others, an individual's decision to join a firm may depend on any of the three factors viz. objective factor, subjective factor and critical contact. Schreuder, A. M. G. (2006). *Careers: An Organisational Perspective* ^[7]. pp. 187.

Objective Factor Theory

It assumes that the applicants are rational. The choice, therefore, is exercised after an objective assessment of the tangible benefits of the job. The factors helping him choose may be the salary, other benefits, location, opportunities for career advancement etc.

Subjective Factor Theory

The decision making is dominated by social and psychological factors. The status of the job, reputation of the organization and other similar factors play an important role.

Critical Contact Theory

The critical factors observed by the candidate during his interaction with the organization play a vital role in decision making. Recruiter being in touch with the candidate, promptness of response and similar factors are important. This theory is more valid with the experienced professionals.

Recruiting Companies

- Adecco
 - AIMS International
 - Association of Executive Search Consultants
 - CDI Corporation
 - Computer Futures
 - Creek Systems
 - Egon Zehnder International
 - Kelly Services
 - Korn/Ferry
 - Michael Page International
 - R. William Funk & Associates
 - Raines International
 - Randstad Holding
 - Recruit
 - Rosenzweig & Company
 - The Amrop Hever Group
 - Transearch International
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- [[Category:Human resource management]]

Training and development

In the field of human resource management, **training and development** is the field which is concerned with organizational activity aimed at bettering the performance of individuals and groups in organizational settings. It has been known by several names, including **human resource development**, and **learning and development**.^[1]

Harrison observes that the name was endlessly debated by the Chartered Institute of Personnel and Development during its review of professional standards in 1999/2000. "Employee Development" was seen as too evocative of the master-slave relationship between employer and employee for those who refer to their employees as "partners" or "associates" to be comfortable with. "Human Resource Development" was rejected by academics, who objected to the idea that people were "resources" — an idea that they felt to be demeaning to the individual. Eventually, the CIPD settled upon "Learning and Development", although that was itself not free from problems, "learning" being an overgeneral and ambiguous name. Moreover, the field is still widely known by the other names.^[1]

Training and development (T&D) encompasses three main activities: training, education, and development. Garavan, Costine, and Heraty, of the Irish Institute of Training and Development, note that these ideas are often considered to be synonymous. However, to practitioners, they encompass three separate, although interrelated, activities.^{[1][2][3]}

- **Training:** This activity is both focused upon, and evaluated against, the job that an individual currently holds.^[3]
- **Education:** This activity focuses upon the jobs that an individual may potentially hold in the future, and is evaluated against those jobs.^[3]
- **Development:** This activity focuses upon the activities that the organization employing the individual, or that the individual is part of, may partake in the future, and is almost impossible to evaluate.^[3]

The "stakeholders" in training and development are categorized into several classes. The *sponsors* of training and development are senior managers. The *clients* of training and development are business planners. Line managers are responsible for coaching, resources, and performance. The *participants* are those who actually undergo the processes. The *facilitators* are Human Resource Management staff. And the *providers* are specialists in the field. Each of these groups has its own agenda and motivations, which sometimes conflict with the agendas and motivations of the others.^[4]

The conflicts are the best part of career consequences are those that take place between employees and their bosses. The number one reason people leave their jobs is conflict with their bosses. And yet, as author, workplace relationship authority, and executive coach, Dr. John Hoover^[5] points out, "Tempting as it is, nobody ever enhanced his or her career by making the boss look stupid." [6] Training an employee to get along well with authority and with people who entertain diverse points of view is one of the best guarantees of long-term success. Talent, knowledge, and skill alone won't compensate for a sour relationship with a superior, peer, or customer.

Talent development

Talent development, part of human resource development, is the process of changing an organization, its employees, its stakeholders, and groups of people within it, using planned and unplanned learning, in order to achieve and maintain a competitive advantage for the organization. Rothwell notes that the name may well be a term in search of a meaning, like so much in management, and suggests that it be thought of as selective attention paid to the top 10% of employees, either by potential or performance.^{[7][8]}

While talent development is reserved for the top management it is becoming increasingly clear that *career development* is necessary for the retention of any employee, no matter what their level in the company. Research has shown that some type of career path is necessary for job satisfaction and hence job retention. Perhaps organizations need to include this area in their overview of employee satisfaction.

The term *talent development* is becoming increasingly popular in several organizations, as companies are now moving from the traditional term *training and development*. Talent development encompasses a variety of components such as training, career development, career management, and organizational development, and training and development. It is expected that during the 21st century more companies will begin to use more integrated terms such as *talent development*.

Washington Group International, in their paper "The Nuclear Renaissance, A Life Cycle Perspective"^[9] defined two logical laws of talent development:

- First law of talent development: "The beginnings of any technology-rich business are all characterized by a shortage of large numbers of technically trained people needed to support ultimate growth"
- Second law of talent development: "The resources will come when the business becomes attractive to the best-and brightest who adapt skills to become part of an exciting opportunity"

Talent development refers to an organization's ability to align strategic training and career opportunities for employees.

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Performance appraisal

A **performance appraisal** (PA) or **performance evaluation**^[1] is a systematic and periodic process that assesses an individual employee's job performance and productivity in relation to certain pre-established criteria and organizational objectives.^{[2][3]} Other aspects of individual employees are considered as well, such as organizational citizenship behavior,^[4] accomplishments, potential for future improvement, strengths and weaknesses, etc.^{[2][5]} To collect PA data, there are three main methods: objective production, personnel, and judgmental evaluation. Judgmental evaluations are the most commonly used with a large variety of evaluation methods.^[1] A PA is typically conducted annually.^[6] The interview could function as "providing feedback to employees, counseling and developing employees, and conveying and discussing compensation, job status, or disciplinary decisions".^[6] PA is often included in performance management systems. Performance management systems are employed "to manage and align" all of an organization's resources in order to achieve highest possible performance.^[1] "How performance is managed in an organization determines to a large extent the success or failure of the organization. Therefore, improving PA for everyone should be among the highest priorities of contemporary" organizations.^[7]

Some applications of PA are performance improvement, promotions, termination, test validation, and more.^[8] While there are many potential benefits of PA, there are also some potential drawbacks. For example, PA can help facilitate management-employee communication; however, PA may result in legal issues if not executed appropriately^{[9][1]} as many employees tend to be unsatisfied with the PA process.^[10] PAs created in and determined as useful in the United States are not necessarily able to be transferable cross-culturally.^[11]

Applications of Performance Appraisal Results

A central reason for the utilization of performance appraisals (PAs) is performance improvement ("initially at the level of the individual employee, and ultimately at the level of the organization").^[8] Other fundamental reasons include "as a basis for employment decisions (e.g. promotions, terminations, transfers), as criteria in research (e.g. test validation), to aid with communication (e.g. allowing employees to know how they are doing and organizational expectations), to establish personal objectives for training" programs, for transmission of objective feedback for personal development, "as a means of documentation to aid in keeping track of decisions and legal requirements"^[8] and in wage and salary administration.^[1] Additionally, PAs can aid in the formulation of job criteria and selection of individuals "who are best suited to perform the required organizational tasks".^[2] A PA can be part of guiding and

monitoring employee career development.^[12] PAs can also be used to aid in work motivation through the use of reward systems.^[2]

Potential Benefits of Performance Appraisals

There are a number of potential benefits of organizational performance management conducting formal performance appraisals (PAs). There has been a general consensus in the belief that PAs lead to positive implications of organizations.^[13] Furthermore, PAs can benefit an organization's effectiveness.^[12] One way is PAs can often lead to giving individual workers feedback about their job performance.^[9] From this may spawn several potential benefits such as the individual workers becoming more productive.^[14]

Other potential benefits include:

- Facilitation of communication: communication in organizations is considered an essential function of worker motivation.^[9] It has been proposed that feedback from PAs aid in minimizing employees' perceptions of uncertainty.^[12] Fundamentally, feedback and management-employee communication can serve as a guide in job performance.^[9]
- Enhancement of employee focus through promoting trust: behaviors, thoughts, and/or issues may distract employees from their work, and trust issues may be among these distracting factors.^[15] Such factors that consume psychological energy can lower job performance and cause workers to lose sight of organizational goals.^[9] Properly constructed and utilized PAs have the ability to lower distracting factors and encourage trust within the organization.^[16]
- Goal setting and desired performance reinforcement: organizations find it efficient to match individual worker's goals and performance with organizational goals.^[9] PAs provide room for discussion in the collaboration of these individual and organizational goals.^[17] Collaboration can also be advantageous by resulting in employee acceptance and satisfaction of appraisal results.^[18]
- Performance improvement: well constructed PAs can be valuable tools for communication with employees as pertaining to how their job performance stands with organizational expectations.^[12] "At the organizational level, numerous studies have reported positive relationships between human resource management (HRM) practices" and performance improvement at both the individual and organizational levels.^[9]
- Determination of training needs: "Employee training and development are crucial components in helping an organization achieve strategic initiatives".^{[9][19]} It has been argued that for PAs to truly be effective, post-appraisal opportunities for training and development in problem areas, as determined by the appraisal, must be offered.^[20] PAs can especially be instrumental for identifying training needs of new employees.^[5] Finally, PAs can help in the establishment and supervision of employees' career goals.^[12]

Potential Complications of Performance Appraisals

Despite all the potential advantages of formal performance appraisals (PAs), there are also potential drawbacks. It has been noted that determining the relationship between individual job performance and organizational performance can be a difficult task.^[19] Generally, there are two overarching problems from which several complications spawn. One of the problems with formal PAs is there can be detrimental effects to the organization(s) involved if the appraisals are not used appropriately. The second problem with formal PAs is they can be ineffective if the PA system does not correspond with the organizational culture and system.^[9]

Complications stemming from these issues are:

- Detrimental to quality improvement: it has been proposed that the use of PA systems in organizations adversely affect organizations' pursuits of quality performance.^[21] It is believed by some scholars and practitioners that the use of PAs is more than unnecessary if there is total quality management.^[17]

- Negative perceptions: “Quite often, individuals have negative perceptions of PAs”.^[13] Receiving and/or the anticipation of receiving a PA can be uncomfortable and distressful^[12] and potentially cause “tension between supervisors and subordinates”.^[14]
- Errors: PAs should provide accurate and relevant ratings of an employee’s performance as compared to pre-established criteria (i.e. organizational expectations).^[22] Nevertheless, supervisors will sometimes rate employees more favorably than that of their true performance in order to please the employees and avoid conflict.^[9] “Inflated ratings are a common malady associated with formal” PA.^[23]
- Legal issues: when PAs are not carried out appropriately, legal issues could result that place the organization at risk.^[14] PAs are used in organizational disciplinary programs^[12] as well as for promotional decisions within the organization.^[9] The improper application and utilization of PAs can affect employees negatively and lead to legal action against the organization.
- Performance goals: performance goals and PA systems are often used in association. Negative outcomes concerning the organizations can result when goals are overly challenging or overemphasized to the extent of effecting ethnics, legal requirements, or quality.^[24] Moreover, challenging performance goals can impede on employees’ abilities to acquire necessary knowledge and skills.^[15] Especially in the early stages of training, it would be more beneficial to instruct employees on outcome goals than on performance goals.^[9]
- Derail merit pay or performance-based pay: some researchers contend that the deficit in merit pay and performance-based pay is linked to the fundamental issues stemming from PA systems.^[20]

Who Conducts Performance Appraisals

Human Resource Management & Performance Management

Human resource management (HRM) conducts performance management. Performance management systems consist of the activities and/or processes embraced by an organization in anticipation of improving employee performance, and therefore, organizational performance.^[25] Consequently, performance management is conducted at the organizational level and the individual level. At the organizational level, performance management oversees organizational performance and compares present performance with organizational performance goals.^[20] The achievement of these organizational performance goals depends on the performance of the individual organizational members.^[20] Therefore, measuring individual employee performance can prove to be a valuable performance management process for the purposes of HRM and for the organization.^[20] Many researchers would argue that “performance appraisal is one of the most important processes in Human Resource Management”.^[10]

The performance management process begins with leadership within the organization creating a performance management policy.^[20] Primarily, management governs performance by influencing employee performance input (e.g. training programs) and by providing feedback via output (i.e. performance assessment and appraisal).^[26] “The ultimate objective of a performance management process is to align individual performance with organizational performance”.^[27] A very common and central process of performance management systems is performance appraisal (PA).^[20] The PA process should be able to inform employees about the “organization’s goals, priorities, and expectations and how well they are contributing to them”.^[27]

When Performance Appraisals are Conducted

Performance appraisals (PAs) are conducted at least annually,^[20] and annual employee performance reviews appear to be the standard in most American organizations.^[6] However, “it has been acknowledged that appraisals conducted more frequently (more than once a year) may have positive implications for both the organization and employee.”^[9] It is suggested that regular performance feedback provided to employees may quell any unexpected and/or surprising feedback to year-end discussions.^[10] In a recent research study concerning the timeliness of PAs, “one of the

respondents even suggested that the performance review should be done formally and more frequently, perhaps once a month, and recorded twice a year.”^[10]

Other researchers propose that the purpose of PAs and the frequency of their feedback are contingent upon the nature of the job and characteristics of the employee.^[28] For example, employees of routine jobs where performance maintenance is the goal would benefit sufficiently from annual PA feedback. On the other hand, employees of more discretionary and non-routine jobs, where goal-setting is appropriate and there is room for development, would benefit from more frequent PA feedback.^{[28][6]}

Methods of Collecting Performance Appraisal Data

There are three main methods used to collect performance appraisal (PA) data: objective production, personnel, and judgmental evaluation. Judgmental evaluations are the most commonly used with a large variety of evaluation methods.^[4]

Objective production

The objective production method consists of direct, but limited, measures such as sales figures, production numbers, the electronic performance monitoring of data entry workers, etc.^[4] The measures used to appraise performance would depend on the job and its duties. Although these measures deal with unambiguous criteria, they are usually incomplete because of criterion contamination and criterion deficiency. Criterion contamination refers to the part of the actual criteria that is unrelated to the conceptual criteria.^[4] In other words, the variability in performance can be due to factors outside of the employee's control. Criterion deficiency refers to the part of the conceptual criteria that is not measured by the actual criteria.^[4] In other words, the quantity of production does not necessarily indicate the quality of the products. Both types of criterion inadequacies result in reduced validity of the measure.^[4] Regardless of the fact that objective production data is not a complete reflection upon job performance, such data is relevant to job performance.

The Happy-Productive Worker Hypothesis

The happy-productive worker hypothesis states that the happiest workers are the most productive performers, and the most productive performers are the happiest workers.^[29] Yet, after decades of research, the relationship between job satisfaction and job performance produces only a weak positive correlation. Published in 2001 by *Psychological Bulletin*, a meta-analysis of 312 research studies produced an uncorrected correlation of 0.18.^[30] This correlation is much weaker than what the happy-productive worker hypothesis would predict. There is no clear relationship between job satisfaction and job performance.^[29]

Personnel

The personnel method is the recording of withdrawal behaviors (i.e. absenteeism, accidents). Most organizations consider unexcused absences to be indicators of poor job performance, even with all other factors being equal,^[29] however, this is subject to criterion deficiency. The quantity of an employee's absences does not reflect how dedicated he/she may be to the job and its duties. Especially for blue-collar jobs, accidents can often be a useful indicator of poor job performance,^[4] but this is also subject to criterion contamination because situational factors also contribute to accidents. Once again, both types of criterion inadequacies result in reduced validity of the measure.^[4] Although excessive absenteeism and/or accidents often indicate poor job performance rather than good performance, such personnel data is not a comprehensive reflection of an employee's performance.^[4]

Judgmental Evaluation

Judgmental evaluation appears to be a collection of methods, and as such, could be considered a methodology. A common approach to obtaining PAs is by means of raters.^[1] Because the raters are human, some error will always be present in the data. The most common types of error are leniency errors, central tendency errors, and errors resulting from the halo effect.^[1] These errors arise predominantly from social cognition and the theory in that how we judge and evaluate other individuals in various contexts is associated with how we “acquire, process, and categorize information”.^[1]

An essential piece of this method is rater training. Rater training is the “process of educating raters to make more accurate assessments of performance, typically achieved by reducing the frequency of halo, leniency, and central-tendency errors”.^[1] Rater training also helps the raters “develop a common frame of reference for evaluation” of individual performance.^[31] Many researchers and survey respondents support the ambition of effectual rater training.^[10] However, it is noted that such training is expensive, time consuming, and only truly functional for behavioral assessments.^[10]

Another piece to keep in mind is the effects of rater motivation on judgmental evaluations. It is not uncommon for rating inflation to occur due to rater motivation (i.e. “organizationally induced pressures that compel raters to evaluate ratees positively”).^[1] Typically, raters are motivated to give higher ratings because of the lack of organizational sanction concerning accurate/inaccurate appraisals, the rater's desire to guarantee promotions, salary increases, etc., the rater's inclination to avoid negative reactions from subordinates, and the observation that higher ratings of the ratees reflect favorably upon the rater.^[1]

The main methods used in judgmental performance appraisal are:^[1]

- **Graphic Rating Scale:** graphic rating scales (see scale (social sciences)) are the most commonly used system in PA.^[1] On several different factors, subordinates are judged on 'how much' of that factor or trait they possess. Typically, the raters use a 5- or 7-point scale; however, there are as many as 20-point scales.^[1]
- **Employee-Comparison Methods:** rather than subordinates being judged against pre-established criteria, they are compared with one another. This method eliminates central tendency and leniency errors but still allows for halo effect errors to occur.^[1] The rank-order method has raters ranking subordinates from “best” to “worst”, but how truly good or bad one is on a performance dimension would be unknown.^[1] The paired-comparison method requires the rater to select the two “best” subordinates out of a group on each dimension then rank individuals according to the number of times each subordinate was selected as one of the “best”.^[1] The forced-distribution method is good for large groups of ratees. The raters evaluate each subordinate on one or more dimensions and then place (or “force-fit”, if you will) each subordinate in a 5 to 7 category normal distribution.^[1] The method of top-grading can be applied to the forced distribution method.^[32] This method identifies the 10% lowest performing subordinates, as according to the forced distribution, and dismisses them leaving the 90% higher performing subordinates.
- **Behavioral Checklists and Scales:** behaviors are more definite than traits. The critical incidents method (or critical incident technique) concerns “specific behaviors indicative of good or bad job performance”.^[1] Supervisors record behaviors of what they judge to be job performance relevant, and they keep a running tally of good and bad behaviors. A discussion on performance may then follow. The behaviorally anchored rating scales (BARS) combine the critical incidents method with rating scale methods by rating performance on a scale but with the scale points being anchored by behavioral incidents.^[1] Note that BARS are job specific.

Peer and Self Assessments

While most judgmental PA research is evaluated by a superior (e.g. supervisor, manager), peer assessments are evaluated by one's colleagues. With self-assessments, individuals evaluate themselves.^[1]

- **Peer Assessments:** members of a group evaluate and appraise the performance of their fellow group members.^[1] There are three common methods of peer assessments. *Peer nomination* involves each group member nominating

who he/she believes to be the “best” on a certain dimension of performance. *Peer ratings* has each group member rate each other on a set of performance dimensions. *Peer ranking* requires each group member rank all fellow members from “best” to “worst” on one or more dimensions of performance.

- Self-Assessments: for self-assessments, individuals assess and evaluate their own behavior and job performance.^[1] It is common for a graphic rating scale to be used for self-assessments. Positive leniency tends to be a problem with self-assessments.^[4]
- 360-Degree Feedback: 360-degree feedback is multiple evaluations of employees which often include assessments from superior(s), peers, and one’s self.^[1]

Organizational Citizenship Behavior

Also referred to as contextual behavior, prosocial behavior, and extra-role behavior, organizational citizenship behavior (OCB) consists of employee behavior that contributes to the welfare of the organization but is beyond the scope of the employee’s job duties.^[4] These extra-role behaviors may help or hinder the attainment of organizational goals. Research supports five dimensions of OCB: altruism, conscientiousness, courtesy, sportsmanship, and civic virtue.^[33] Researchers have found that the OCB dimensions of altruism and civic virtue can have just as much of an impact on manager’s subjective evaluations of employees’ performances as employees’ objective productivity levels.^[34] The degree to which OCB can influence judgments of job performance is relatively high. Controversy exists as to whether OCB should be formally considered as a part of performance appraisal (PA).

Performance Appraisal Interviews

The performance appraisal (PA) interview is typically the final step of the appraisal process.^[1] The interview is held between the subordinate and supervisor. The PA interview can be considered of great significance to an organization’s PA system.^[6] It is most advantageous when both the superior and subordinate participate in the interview discussion and establish goals together.^[1] Three factors consistently contribute to effective PA interviews: the supervisor’s knowledge of the subordinate’s job and performance in it, the supervisor’s support of the subordinate, and a welcoming of the subordinate’s participation.^[6]

Employee Reactions to Performance Appraisal

Numerous researchers have reported that many employees are not satisfied with their performance appraisal (PA) systems.^[10] Studies have shown that subjectivity as well as appraiser bias is often a problem perceived by as many as half of employees.^[10] Appraiser bias, however, appears to be perceived as more of a problem in government and public sector organizations.^[10] Also, according to some studies, employees wished to see changes in the PA system by making “the system more objective, improving the feedback process, and increasing the frequency of review.”^[10] In light of traditional PA operation defects, “organizations are now increasingly incorporating practices that may improve the system. These changes are particularly concerned with areas such as elimination of subjectivity and bias, training of appraisers, improvement of the feedback process and the performance review discussion.”^[10]

According to a meta-analysis of 27 field studies, general employee participation in his/her own appraisal process was positively correlated with employee reactions to the PA system.^[18] More specifically, employee participation in the appraisal process was most strongly related to employee satisfaction with the PA system.^[18] Concerning the reliability of employee reaction measures, researchers have found employee reaction scales to be sound with few concerns through using a confirmatory factor analysis that is representative of employee reaction scales.^[35]

Researchers suggest that the study of employees’ reactions to PA is important because of two main reasons: employee reactions symbolizes a criterion of interest to practitioners of PAs and employee reactions have been associated through theory to determinants of appraisal acceptance and success.^[35] Researchers translate these reasons into the context of the scientist-practitioner gap or the “lack of alignment between research and practice.”^[35]

Performance Appraisal and Legal Implications

There are federal laws addressing fair employment practices, and this also concerns performance appraisal (PA). Discrimination can occur within predictions of performance and evaluations of job behaviors.^[1] The revision of many court cases has revealed the involvement of alleged discrimination which was often linked to the assessment of the employee's job performance.^[36] Some of the laws which protect individuals against discrimination are "the Title VII of the Civil Rights Act of 1964, the Civil Rights Act of 1991, the Age Discrimination in Employment Act (ADEA), and the Americans with Disabilities Act (ADA)."^[1] Lawsuits may also result from charges of an employer's negligence, defamation, and/or misrepresentation.^[1] A few appraisal criteria to keep in mind for a legally sound PA is to keep the content of the appraisal objective, job-related, behavior-based, within the control of the ratee, and related to specific functions rather than a global assessment.^[36] Some appraisal procedure suggestions for a legally sound PA is to standardize operations, communicate formally with employees, provide information of performance deficits and give opportunities to employees to correct those deficits, give employees access to appraisal results, provide written instructions for the training of raters, and use multiple, diverse and unbiased raters.^[36] These are valuable but not exhaustive lists of recommendations for PAs.

Cross-Cultural Implications of Performance Appraisal

Performance appraisal (PA) systems, and the premises of which they were based, that have been formed and regarded as effective in the United States may not have the transferability for effectual utilization in other countries or cultures, and vice versa.^[11] Performance "appraisal is thought to be deeply rooted in the norms, values, and beliefs of a society".^[37] "Appraisal reflects attitudes towards motivation and performance (self) and relationships (e.g. peers, subordinates, supervisors, organization), all of which vary from one country to the next".^[38] Therefore, appraisal should be in conjunction with cultural norms, values, and beliefs in order to be operative.^[39] The deep-seated norms, values and beliefs in different cultures affect employee motivation and perception of organizational equity and justice. In effect, a PA system created and considered effectual in one country may not be an appropriate assessment in another cultural region.^[38]

For example, some countries and cultures value the trait of assertiveness and personal accomplishment while others instead place more merit on cooperation and interpersonal connection. Countries scoring high on assertiveness consider PA to be a way of assuring equity among employees so that higher performing employees receive greater rewards or higher salaries.^[38] Countries scoring low on assertiveness but higher in interpersonal relations may not like the social separation and pay inequity of higher/lower performing employees; employees from this more cooperative rather than individualistic culture place more concern on interpersonal relationships with other employees rather than on individual interests.^[38] High assertive countries value performance feedback for self-management and effectiveness purposes while countries low in assertiveness view performance feedback as "threatening and obtrusive".^{[40][38]} In this case, the PA of the high assertive countries would likely not be beneficial for countries scoring lower in assertiveness to employ. However, countries scoring lower in assertiveness could employ PA for purposes of improving long-term communication development within the organization such as clarifying job objectives, guide training and development plans, and lessen the gap between job performance and organizational expectations.^[41]

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Remuneration

Remuneration is the total compensation that an employee receives in exchange for the service they perform for their employer. Typically, this consists of monetary rewards, also referred to as wage or salary.^[1] A number of complementary benefits, however, are increasingly popular remuneration mechanisms.

Types

Remuneration can include:

- Commission
- Compensation
 - Executive compensation
 - Deferred compensation
- Compensation methods (in online advertising and internet marketing)
- Employee stock option
- Fringe benefit
- Salary
 - Performance Linked Incentives
- Wage

By country

- United States
 - Executive compensation

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- [1] <http://www.wordreference.com/definition/remuneration>

Collective agreement

A **collective agreement** or **collective bargaining agreement (CBA)** is an agreement between employers and employees which regulates the terms and conditions of employees in their workplace, their duties and the duties of the employer. It is usually the result of a process of collective bargaining between an employer (or a number of employers) and a trade union representing workers.

United Kingdom

In the United Kingdom, collective agreements are conclusively deemed to be not legally binding under the Trade Union and Labour Relations (Consolidation) Act 1992 section 179. This presumption may be rebutted when the agreement is in writing and contains an explicit provision asserting that it should be legally enforceable. This reflects the tradition in British industrial relations policy of legal abstentionism from workplace disputes.

Notes

Trade union

A **trade union** (British English), **labour union** (Canadian English) or **labor union** (American English) is an organization of workers who have banded together to achieve common goals such as protecting the integrity of its trade, achieving higher pay, increasing the number of employees an employer hires, and better working conditions. The trade union, through its leadership, bargains with the employer on behalf of union members (rank and file members) and negotiates labour contracts (collective bargaining) with employers. The most common purpose of these associations or unions is "maintaining or improving the conditions of their employment".^[1]



Labour union demonstrators held at bay by soldiers during the 1912 Lawrence textile strike in Lawrence, Massachusetts.

This may include the negotiation of wages, work rules, complaint procedures, rules governing hiring, firing and promotion of workers, benefits, workplace safety and policies. The agreements negotiated by the union leaders are binding on the rank and file members and the employer and in some cases on other non-member workers.

Originating in Europe, trade unions became popular in many countries during the Industrial Revolution, when the lack of skill necessary to perform most jobs shifted employment bargaining power almost completely to the employers' side, causing many workers to be mistreated and underpaid. Trade union organisations may be composed of individual workers, professionals, past workers, students, apprentices and/or the unemployed.

Over the last three hundred years, trade unions have developed into a number of forms. Aside from collective bargaining, activities vary, but may include:

- Provision of benefits to members: Early trade unions, like Friendly Societies, often provided a range of benefits to insure members against unemployment, ill health, old age and funeral expenses. In many developed countries, these functions have been assumed by the state; however, the provision of professional training, legal advice and representation for members is still an important benefit of trade union membership.
- Industrial action: Trade unions may enforce strikes or resistance to lockouts in furtherance of particular goals.
- Political activity: Trade unions may promote legislation favourable to the interests of their members or workers as a whole. To this end they may pursue campaigns, undertake lobbying, or financially support individual candidates or parties (such as the Labour Party in Britain) for public office. In some countries (e.g., the Nordic countries and the Philippines), trade unions may be invited to participate in government hearings about educational or other labour market reforms.

History

The origins of unions' existence can be traced from the 18th century, where the rapid expansion of industrial society drew women, children, rural workers, and immigrants to the work force in numbers and in new roles. This pool of unskilled and semi-skilled labour spontaneously organised in fits and starts throughout its beginnings,^[1] and would later be an important arena for the development of trade unions. Trade unions as such were endorsed by the Catholic Church towards the end of the 19th century. Pope Leo XIII in his "Magna Carta"—*Rerum Novarum*—spoke against the atrocities workers faced and demanded that workers should be granted certain rights and safety regulations.^[2] Industries like textile mills and railways companies had started in India in the latter half of the 19th century.

Origins and early history

Trade unions have sometimes been seen as successors to the guilds of medieval Europe, though the relationship between the two is disputed.^[3] Medieval guilds existed to protect and enhance their members' livelihoods through controlling the instructional capital of artisanship and the progression of members from apprentice to craftsman, journeyman, and eventually to master and grandmaster of their craft. A trade union might include workers from only one trade or craft, or might combine several or all the workers in one company or industry. These things varied from region to region, based on the specific industrialisation path taken in the place in question.^[4]

Trade unions and/or collective bargaining were outlawed from no later than the middle of the 14th century when the Ordinance of Labourers was enacted in the Kingdom of England. Union organizing would eventually be outlawed everywhere and remain so until the middle of the 19th century.

Since the publication of the *History of Trade Unionism* (1894) by Sidney and Beatrice Webb, the predominant historical view is that a trade union "is a continuous association of wage earners for the purpose of maintaining or improving the conditions of their employment."^[1] A modern definition by the Australian Bureau of Statistics states that a trade union is "an organisation consisting predominantly of employees, the principal activities of which include the negotiation of rates of pay and conditions of employment for its members."^[5]

Yet historian R.A. Leeson, in *United we Stand* (1971), said:

Two conflicting views of the trade-union movement strove for ascendancy in the nineteenth century: one the defensive-restrictive guild-craft tradition passed down through journeymen's clubs and friendly societies, ... the other the aggressive-expansionist drive to unite all 'labouring men and women' for a 'different order of things'.

Recent historical research by Bob James in *Craft, Trade or Mystery* (2001) puts forward the view that trade unions are part of a broader movement of benefit societies, which includes medieval guilds, Freemasons, Oddfellows, friendly societies, and other fraternal organisations.

The 18th century economist Adam Smith noted the imbalance in the rights of workers in regards to owners (or "masters"). In *The Wealth of Nations*, Book I, chapter 8, Smith wrote:

We rarely hear, it has been said, of the combination of masters, though frequently of those of workmen. But whoever imagines, upon this account, that masters rarely combine, is as ignorant of the world as of the subject. Masters are always and everywhere in a sort of tacit, but constant and uniform combination, not to raise the wages of labor above their actual rate[.]

When workers combine, masters ... never cease to call aloud for the assistance of the civil magistrate, and the rigorous execution of those laws which have been enacted with so much severity against the combination of servants, labourers, and journeymen.

As Smith noted, unions were illegal for many years in most countries, although Smith argued that it should remain illegal to fix wages or prices by employees or employers. There were severe penalties for attempting to organize unions, up to and including execution. Despite this, unions were formed and began to acquire political power, eventually resulting in a body of labour law that not only legalized organizing efforts, but codified the relationship between employers and those employees organized into unions. Even after the legitimisation of trade unions there was opposition, as the case of the Tolpuddle Martyrs shows.

The right to join a trade union is mentioned in article 23, subsection 4 of the Universal Declaration of Human Rights (UDHR), which also states in article 20, subsection 2 that "No one may be compelled to belong to an association". Prohibiting a person from joining or forming a union, as well as forcing a person to do the same (e.g. "closed shops" or "union shops", see below), whether by a government or by a business, is generally considered a human rights abuse. Similar allegations can be levelled if an employer discriminates based on trade union membership. Attempts by an employer, often with the help of outside agencies, to prevent union membership amongst their staff is known as union busting.

Prevalence

The prevalence of unions in various countries can be assessed using the measure "union density". The definition of union density is "the proportion of paid workers who are union members".^[6] Thus, union density provides a rough picture of union membership only; it does not account for the circumstance that in some countries, also many persons under education, many unemployed persons, many retired persons and/or many persons who had to leave work due to occupational injuries may also be union members. (In some countries, such groups of persons may be strongly motivated to maintain union members if, e.g., educational, unemployment, retirement and/or even disability benefits are in part or totally union-administered.)

Trade union density figures are provided below for countries in every continent on the globe:^{[7][8][9]}

Trade Union Density in %

Country	Density	Country	Density	Country	Density
Western Europe		Eastern Europe		Asia	
Iceland (2006)	88	Moldova (2005)	80	China (2000)	90
Sweden (2007)	71	Macedonia (2006)	75	Tajikistan (2006)	90
Finland (2007)	70	Slovenia (2004)	45	Georgia (2005)	80
Denmark (2007)	69	Russia (2003)	45	Taiwan (2003)	38
Cyprus (2002)	68	Romania (2005)	30	Bangladesh (2001)	35
Malta (2005)	59	Slovakia (2004)	24	Kazakhstan (2002)	31
Norway (2007)	54	Czech Rep. (2006)	21	Philippines (2002)	27
Belgium (2007)	53	Albania (2006)	20	Hong Kong SAR (2002)	22
Luxembourg (2007)	46	Hungary (2007)	17	Sri Lanka (no year)	20
Austria (2006)	40	Latvia (2006)	16	Singapore (2006)	19
Italy (2007)	33	Poland (2006)	16	Japan (2007)	18
Ireland (2007)	32	Bulgaria (2001)	16	Malaysia (2000)	18
Greece (2007)	30	Lithuania (2006)	14	Indonesia (2005)	14
United Kingdom (07)	28	Estonia (2005)	11	Rep. of Korea (2006)	10
Germany (2007)	20	Centr. & South America		India (2001)	8
Netherlands (2007)	20	Suriname (2006)	60	Thailand (2006)	3
Spain (2006)	16	Barbados (2002)	34	Pakistan (2002)	3
Portugal (2004)	19	Argentina (2002)	29	Cambodia (2006)	1
Switzerland (2006)	19	Bolivia (2006)	25	Middle East & Africa	
France (2007)	8	Brazil (2002)	18	Kenya (2006)	33
Australia & New Zealand		Uruguay (2000)	16	Namibia (2000)	32
New Zealand (2006)	22	Costa Rica (2002)	15	Israel (2006)	25
Australia (2007)	19	Chile (2006)	15	Botswana (2006)	20
North America		Honduras (2003)	14	Gambia (2006)	20
Canada (2007)	29	Puerto Rico (2002)	14	Tunisia (2004)	15
Mexico (2005)	18	Ecuador (2002)	12	Nigeria (2004)	10
USA (2007)	12	Venezuela (2002)	12	Turkey (2004)	8
Key to Sources:		Panama (2005)	11	Morocco (2000)	5
OECD.stat, 2010		El Salvador (2003)	5	Tanzania (2002)	5
Hall-Jones, 2010		Nicaragua (1998)	5	Oman (2007)	0
Johnson, 2004		Peru (2002)	5	Qatar (2004)	0
				Saudi Arabia (2000)	0
				United Arab Fr. (2004)	0

Europe

In France, Germany, and other European countries, socialist parties and democrats played a prominent role in forming and building up trade unions, especially from the 1870s onwards. This stood in contrast to the British experience, where moderate New Model Unions dominated the union movement from the mid-19th century and where trade unionism was stronger than the political labour movement until the formation and growth of the Labour Party in the early years of the 20th century.

Government opposition to Trade unionism in the United Kingdom was a major factor in economic crises during the 1960s and in particular the 1970s, culminating some would argue in the Winter of Discontent of late 1978 and early 1979, when a significant percentage of the nation's public sector workers went on strike. By this stage, some 12,000,000 workers in the United Kingdom were trade union members. However, the election of the Conservative Party led by Margaret Thatcher at the general election in May 1979, at the expense of Labour's James Callaghan, saw substantial trade union reform which saw the level of strikes fall, but also the level of trade union membership fall.

At the height of the strikes, nearly 30,000,000 working days were lost in Britain during 1979, but that had fallen dramatically to some 5,000,000 during 1981 as a result of the Thatcher government's union reform policies. The number of working days lost in the country due to strikes rose sharply to more than 25,000,000 in 1984, though most of these were miners on strike, and from then on the number of working days lost in Britain due to strikes remained in the low millions.^[10]

By the end of the 1980s, membership had fallen to just over 6,000,000—little more than half the level of a decade earlier—and it also counted against the Labour Party's hopes of regaining power, as its relationship with the trade unions had traditionally been seen as a strength but after the Winter of Discontent it was seen as a liability. Manufacturing, the main source of union strength in the United Kingdom, had shrunk by half during the early 1980s recession pushing unemployment from 1,500,000 to more than 3,000,000.^[11]

Earlier in the 1970s, Conservative prime minister Edward Heath (elected in 1970) had attempted to reduce trade union powers due to the rising level of strikes across the country. However, he backed down with his stance against

the unions following a backlash by the militant miners' union, which saw many of his own MPs turn against him. The strikes continued, and Heath responded by calling a snap election in February 1974. The election resulted in a hung parliament with the Tories having the most votes but Labour having slightly more seats, and failed attempts by Heath to form a coalition with the Liberals led to the resignation of his government and the return of Harold Wilson as prime minister of a minority Labour government, which gained a three-seat majority at a second election later in the year.^[12]

After the Winter of Discontent and the subsequent fall of the Labour government, many corners of the public and media believed that the trade unions were running the Labour Party - an image which Neil Kinnock was keen to shake off after becoming party leader in 1983. By the time Labour returned to government in 1997 after 18 years in opposition, Tony Blair (leader since 1994) had abandoned the Labour policy of going back on Tory-led union reforms, as well as ending the commitment of nationalisation of industries and utilities.^[13]

In the rest of Europe, in the wake of the neo-liberal turn in politics ushered in by British Prime Minister Margaret Thatcher and US President Ronald Reagan, union membership has also been declining. As noted by the Federation of European Employers:

“Over the last twenty years there has been a widespread decline in trade union membership throughout most of western Europe. Since the fall of the Iron Curtain in 1989, unionisation in many eastern European states has collapsed at an even more dramatic rate. In Poland, for example, today's 14 % level of unionisation is in marked contrast to that of the Soviet-controlled era, when almost all workplaces were unionised. Most of those who remain trade union members in Poland work for former state-owned companies.

In only 8 out of the current 27 member states of the European Union (EU) are more than half of the employed population members of a trade union. In fact, the EU's four most populated states all have modest levels of unionisation, with Italy at 30%, the UK 29%, Germany 27% and France at only 9%.

As a consequence, three out of every four people employed in the EU are now not members of a trade union. Furthermore, in every EU country outside Scandinavia (except Belgium), trade union membership is either static or continues to decline.”^[14]

Unions in the United States

19th-century American unionism

In the early 19th century, many men from large cities put together the organisation which we now call the Trade Union Movement. Individuals who were members of unions at this time were skilled, experienced, and knew how to get the job done. Their main reasoning for starting this movement was to put on strikes. However, they did not have enough men to fulfil their needs and the unions which began this trendy movement collapsed quickly. The Mechanics' Union Trade Association was the next approach to bring workers together. In 1827, this union was the first US labour organization which brought together workers of divergent occupations. This was "the first city-wide federation of American workers, which recognised that all labour, regardless of trades, had common problems that could be solved only by united efforts as a class."^[15] This organisation took off when carpentry workers from Philadelphia went on strike to protest their pay wages and working hours. This union strike was only a premonition of what was to come in the future.

According to history.com:^[16]

Besides acting to raise wages and improve working conditions, the federations espoused certain social reforms, such as the institution of free public education, the abolition of imprisonment for debt, and the adoption of universal manhood suffrage. Perhaps the most important effect of these early unions was their introduction of political action.

Workers realized what unionism was all about through the configuration of mechanics association and many people followed in their footsteps. The strike gave others hope that they could get their concerns out by word of mouth.

Before this time many people did not speak about their concerns because of the lack of bodies. However, with more people comes more confidence. Strikes were a new way of speaking your mind and getting things accomplished.

The next established union which made an impact on the trade movement was the Grand National Consolidated Trade Union. This union was founded in 1834 as the first domestic association. However, this union was short lived due to the panic of 1837. "[Andrew] Jackson thought the Bank of the United States hurt ordinary citizens by exercising too much control over credit and economic opportunity, and he succeeded in shutting it down. But the state banks' reckless credit policies led to massive speculation in Western lands. By 1837, after Van Buren had become president, banks were clearly in trouble. Some began to close, businesses began to fail, and thousands of people lost their land."^[17] This collapse of financial support and businesses left workers unemployed. Many of these workers, who became affected by the 1837 disaster, were members of a union. It was very hard for them to stay together in an economic hardship and the trade union movement came to a bump in the road. But the economy was restored by the early 1840s and trade unions started doing better. National labour unions were forming, different than ones in the past, consisting now of members of the same occupation.

"Labor is prior to, and independent of, capital. Capital is only the fruit of labor, and could never have existed if labor had not first existed. Labor is the superior of capital, and deserves much the higher consideration."

— U.S. President Abraham Lincoln, 3 December 1861^[18]

The work force was drastically impacted by the Civil War and the economy was thriving. Many workers gained employment because of this economic boom and unions increased greatly. "More than 30 national craft unions were established during the 1860s and early '70s."^[16] One of the significant national craft unions to be formed during this time was the National Labor Union (NLU). It was created in 1866 and included many types of workers.^[19] Although relatively short-lived, the NLU paved the way for future American unions. Following the decline of the NLU, the Knights of Labor became the leading countrywide union in the 1860s. This union did not include Chinese, and partially included black people and women.^[20]

Knights of Labor

The Noble and Holy Order of the Knights of Labor (KOL) was founded in Philadelphia in 1869 by Uriah Stephens and six other men. The union was formed for the purpose of organizing the flyers, educating and directing the power of the industrial masses, according to their Constitution of 1878.^[21] The Knights gathered people to join the Order who believed in creating "the greatest good to the greatest amount of people". The Knights took their set goals very seriously. Some of which consisted of "productive work, civic responsibility, education, a wholesome family life, temperance, and self-improvement."^[22]

The Knights of Labor worked as a secret fraternal society until 1881. The union grew slowly until the economic depression of the 1870s, when large numbers of workers joined the organisation.^[23] The Knights only permitted certain groups of individuals into their Order which promoted social division amongst the people around them. Bankers, speculators, lawyers, liquor dealers, gamblers, and teachers were all excluded from the union. These workers were known as the "non-producers" because their jobs did not entail physical labour. Factory workers and business men were known as the "producers" because their job constructed a physical product. The working force producers were welcomed into the Order. Women were also welcome to join the Knights, as well as black workers by the year 1883.^[24] However, Asians were excluded. In November 1885, the Knights of a Washington city pushed to get rid of their Asian population. The knights were strongly for the Chinese Exclusion Act of 1882 because it greatly helped them deteriorate the Asian community. "The Act required the few non-labourers who sought entry to obtain certification from the Chinese government that they were qualified to immigrate. But this group found it increasingly difficult to prove that they were not labourers because the 1882 act defined excludables as 'skilled and unskilled labourers and Chinese employed in mining.' Thus very few Chinese could enter the country under the 1882 law."^[25]

The act also stated that if an Asian left the country, they needed a certificate to re-enter.

Although Asians were not welcomed in the union, black workers who joined the union brought a large number of blacks into the white labour movement. In 1886, the Union exceeded 700,000 members, 60,000 of them black. The Knights were told that they "broke the walls of prejudice"; the "color line had been broken and black and white were found working in the same cause.

American Federation of Labor

The American Federation of Labor (AFL), founded by Samuel Gompers, was established due to the vexation of many Knights who parted from the KOL. Many Knights joined the AFL because they set themselves apart from the KOL. The KOL "tried to teach the American wage-earner that he was a wage-earner first and a bricklayer, carpenter, miner [...] after. This meant that the Order was teaching something that was not so in the hope that sometime it would be.' But the AFL affiliates organised carpenters as carpenters, bricklayers as bricklayers, and so forth, teaching them all to place their own craft interests before those of other workers."^[26]

The AFL also differed from the KOL because it only allowed associations to be formed from workers and workers were the only people permitted to join them. Unlike the AFL, the knights also allowed small businesses to join. A small business is "An independently owned and operated business that is not dominant in its field of operation and conforms to standards set by the Small Business Administration or by state law regarding number of employees and yearly income called also small business concern."^[27]

Since the Knights (KOL) allowed an array of members into their association, they ended up getting rid of many because they did not fit the title. However, the AFL was right behind them picking up their pieces. This was another way in which the AFL helped to destroy the Knights. Once an associate was no longer a knight, and they fit the description of an AFL member, they hunted them down and offered them a spot. Many times spots were offered to men who were still Knights. This allowed the AFL to grow very strong with a diverse set of members.

The diversity in the AFL faltered when many of the black members were excluded. Gompers only wanted skilled workers representing his union and many black people were not considered skilled. The AFL claimed to not exclude the black members because of their race but because they were not qualified for the part. "So as long as wages rose, and they did, hours fell, and they did, security increased, and it appeared to, the AFL could grow fat while neglecting millions of labourers doomed to lives of misery and want."^[26] Even black workers considered skilled enough to fit the part were generally excluded from the Union. The AFL conducted literacy tests which had the effect of excluding immigrants and blacks. Regardless of black members being excluded, the AFL was the most prevalent union federation in America before the mid-1940s. The union was composed of over 10 million members before it combined with the Congress of Industrial Organization (CIO).

Congress of Industrial Organizations

The CIO was put forth by Mr. John Kamau when troubles with the AFL persisted, after the death of Gompers in 1924. Many members of the union requested that they switch the rules which were laid out by Gompers. They wanted to support inexperienced workmen rather than only focusing on experienced workers of one occupation. John L. Lewis was the first member of the AFL to act upon this issue in 1935. He was the founder of the Committee for the Industrial Organization which was an original union branched from the AFL. The Committee for the Industrial Organization transformed into the Congress of Industrial Organization. The Congress of Industrial Organizations (CIO) encompassed the largest sustained surge of worker organisation in American history.^[28] In the 1930s, the CIO grabbed many of their member's attention through victorious strikes. In 1935, employees of Goodyear Tire and Rubber Company formed their own union called the United Rubber Workers. The Rubber Workers went on strike in 1936 to protest an increase in product with lower pay wages. "There were forty-eight strikes in 1936 in which the strikers remained at their jobs for at least one day; in twenty-two of these work stoppages, involving 34,565 workers, the strikers stayed inside the plants for more than twenty-four hours."^[29] This tactic was called a "sit-down" strike which entailed workers to stop doing their job and sit in their place of employment. During these strikes, business owners were unable to bring in new workers to replace the ones who were on strike because they were still in their

seats at the factory. This was unlike any strikes in the past. Before this time, workers showed their fury by leaving their factory and standing in picket lines. Walter Reuther was in control of the union at this time and moved forward to higher roles during 1955.

AFL-CIO

On 5 May 1955, union delegates gathered in New York on behalf of 16 million workers, to witness and support the merger of The American Federation of Labor and The Congress of Industrial Organization. The merger is a result of 20 years of effort put forth by both the AFL and CIO presidents, George Meany and Walter Reuther. The gathered delegates applauded loudly when the time came to nominate officers for the new AFL-CIO. Reuther who was named one of the 37 vice presidents of the union, nominated Meany for President. After Meany's retirement in 1979, Lane Kirkland took over his position. President Dwight D. Eisenhower, who was elected in 1952, was the first to publicly address and congratulate the new union, which was now the largest in the world.

In Eisenhower's telephone broadcast to the United States he acknowledged the impact union members had made to better the nation and one of these impacts was "the development of the American philosophy of labour."^[30] Eisenhower states three principles which he feels apply to the philosophy of labour. The first principles states that: "the ultimate values of mankind are spiritual; these values include liberty, human dignity, opportunity and equal rights and justice."^[30] Eisenhower was stating that every individual deserves a job with decent compensation, practical hours, and good working conditions that leave them feeling fulfilled. His second principle speaks of the economic interest of the employer and employee being a mutual prosperity.^[30] The employers and employees must work together in order for there to be the greatest amount of wealth for all. Workers have a right to strike when they feel their boundaries are being crossed and the best way for the employer to fix the employees unhappiness is to come to a mutual agreement. His last principle which he preached stated: "labour relations will be managed best when worked out in honest negotiation between employers and unions, without Government's unwarranted interference."^[30] Eisenhower was saying that when both parties cooperate and act in mature fashion, it will be easier to work out situations and a better outcome will result because of it. Once he was done delivering the speech, everyone across the U.S. knew of the new AFL-CIO whose "mission [was] to bring social and economic justice to our nation by enabling working people to have a voice on the job, in government, in a changing global economy and in their communities."^[31]

This new alliance is made up of 56 nationwide and intercontinental labour unions. The unions which are a part of this alliance are composed of 2.5 million working Americans and 8.5 million other affiliated members. These members do not fall under one job title but they are very diversely spread out among the working area. Their jobs go from doctors to truck drivers and painters to bankers. The mission of these workers and the AFL-CIO "is to improve the lives of working families—to bring economic justice to the workplace and social justice to our nation. To accomplish this mission we will build and change the American labour movement."^[32] The AFL-CIO also has many goals which coincide with their mission:

We will build a broad movement of American workers by organizing workers into unions. We will build a strong political voice for workers in our nation. We will change our unions to provide a new voice to workers in a changing economy. We will change our labour movement by creating a new voice for workers in our communities.

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The association was willing to go to any extent to help out their employers which is why the membership was so high. Members started to slowly disappear after 25 successful years of a steady membership. Starting out with 16 million members in 1955 and dropping down to 13 million by 1984 is a significant loss. This loss of members is in large part due to the 1957 removal of the Teamsters' Union who were long time members of the AFL. The Teamsters' were involved in organized crime and manipulating employers with strong force. The Teamsters' philosophy was to

Let each member do his duty as he sees fit. Let each put his shoulder to the wheel and work together to bring about better results. Let no member sow seeds of discord within our ranks, and let our enemies see that the Teamsters of this country are determined to get their just rewards and to make their organization as it should be—one of the largest and strongest trade unions in the country now and beyond.

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This philosophy did not work well for Teamster presidents Beck, Hoffa, and Williams who were all accused of criminal acts and sent to prison. In 1987 the AFL-CIO membership grew to 14 million members when the Teamsters Union was restored to the association.

The AFL-CIO also lost many members due to financial struggles in the United States. During the late 20th century the U.S. dollar began to oscillate due to rivalry with foreign countries and their currencies. This affects global trafficking and results in job loss for American citizens. The issues between the United States and foreign countries cannot be resolved by Eisenhower's third principle, which entailed honest negotiations. Consequently, the association has been dynamically supportive in administration policies which deal with global trafficking, the production of goods, and many other issues, which are optimistic policies that will add to an established financial system.

The AFL-CIO is now governed by a gathering of delegates who are present on behalf of association members who meet every four years. The delegates who are the spokespeople of the federation members are chosen by union members. While the delegates vote for new representatives every four years, they also lay down the goals and policies for the union. The most recent representatives for the organisation along with 45 vice presidents are President John J. Sweeny, Secretary-treasurer Richard Trumka, and executive vice president Arlene Holt Baker

In the United States there are a total of 15.4 million union members, "11 million of whom belong to unions affiliated with the AFL-CIO."^[34] This number has grown rapidly since the beginning of the union movement because today, all individuals with different occupations are welcomed to join unions. "Today's unions include manufacturing and construction workers, teachers, technicians and doctors—and every type of worker in between. No matter what you do for a living, there's a union that has members who do the same thing."^[34] Educating union members about issues that shape lives of functioning families on a daily basis is one of the AFL-CIO's policies. They give them confidence to have their voices heard for political purposes. They also prioritize in

creating family-supporting jobs by investing tax dollars in schools, roads, bridges and airports; improving the lives of workers through education, job training and raising the minimum wage; keeping good jobs at home by reforming trade rules, reindustrializing the U.S. economy and redoubling efforts at worker protections in the global economy; strengthening Social Security and private pensions; making high-quality, affordable health care available to everyone; and holding corporations more accountable for their actions.

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The AFL-CIO is very supportive of political issues and they show their concern by giving out information about existing political issues to families. This information is spread by volunteers and activists and includes where all the candidates stand on the issues.

Japan

Labour unions emerged in Japan in the second half of the Meiji period as the country underwent a period of rapid industrialization.^[35] Until 1945, however, the labour movement remained weak, impeded by lack of legal rights,^[36] anti-union legislation,^[35] management-organized factory councils, and political divisions between “cooperative” and radical unionists.^[37] In the immediate aftermath of the Second World War, the US Occupation authorities initially encouraged the formation of independent unions.^[36] Legislation was passed that enshrined the right to organize,^[38] and membership rapidly rose to 5 million by February, 1947.^[36] The organization rate, however, peaked at 55.8% in 1949 and subsequently declined to 18.2% (2006).^[39] The labour movement went through a process of reorganization from 1987 to 1991^[40] from which emerged the present configuration of three major labour union federations, Rengo, Zenroren, and Zenrokyo along with other smaller national union organizations.



2011 National Trade Union Council (Zenrokyo) May Day march, Tokyo.

Mexico

Before the 1990s, unions in Mexico had been historically part of a state institutional system. Between 1940, till the 1980s worldwide spread of neo-liberalism through the Washington Consensus, the Mexican unions did not operate independently, but instead as part of a state institutional system, largely controlled by the ruling party.^[41]

During these 40 years, the primary aim of the labour unions was not to benefit the workers, but to carry out the state's economic policy under their cosy relationship with the ruling party. This economic policy, which peaked in the 1950-60s with the so called Mexican Miracle, saw rising incomes and rising standards of living. Only a minor part went to the workers, while the primary beneficiaries had been the wealthy.^[41]

In the 1980s, Mexico began to follow the Washington Consensus, and sell off state industries (railroad, telecommunication) to private industries. The new owners had an antagonist attitude towards unions, and the unions, accustomed to the comfortable relationship with the state, were not prepared to fight back. A movement of new unions began to emerge with a more independent model, while the old institutionalised unions had become very corrupt, violent and gangster led. From the 1990s, the new model of independent unions prevailed, and a number of them were represented by the National Union of Workers.^[41]

Current old institutions like the Oil Workers Union and the National Education Workers Union (Sindicato Nacional de Trabajadores de la Educacion) are sordid demonstrations of how the use of government benefits are not being applied to improve the quality in the investigation of the use of oil or the basic education in Mexico as long as their leaders show publicly that they are living wealthy and in the case of the Teachers Union represented by Elba Esther Gordillo, they are not allowing government to input a way to evaluate and improve the knowledge of the Mexican teachers allowing to incompetent elements to use those places to escalate in the Union or to avoid the responsibility for they were hired.

Australia

Supporters of Unions, such as the ACTU or Australian Labor Party, often credit trade unions with leading the labour movement in the early 20th century, which generally sought to end child labour practices, improve worker safety, increase wages for both union workers and non-union workers, raise the entire society's standard of living, reduce the hours in a work week, provide public education for children, and bring other benefits to working-class families.^[42]



A video retrospective from the ABC on one of Australia's largest disputes in recent years, the 1998 Australian waterfront dispute.

Structure and politics

Unions may organize a particular section of skilled workers (craft unionism, traditionally found in Australia, Canada, Denmark, Norway, Sweden, Switzerland, the UK and the USA^[4]), a cross-section of workers from various trades (general unionism, traditionally found in Australia, Canada, Denmark, Netherlands, the UK and the USA^[43]), or attempt to organize all workers within a particular industry (industrial unionism, found in Australia, Belgium, Canada, Germany, Finland, Norway, South Korea, Sweden, Switzerland, the UK, and the USA^[44]). These unions are often divided into "locals", and united in national federations. These federations themselves will affiliate with Internationals, such as the International Trade Union Confederation.

However, in Japan, union organisation is slightly different due to the presence of enterprise unions, i.e. unions that are specific to a specific plant or company. These enterprise unions, however, join industry-wide federations which in turn are members of Rengo, the Japanese national trade union confederation.^[45]

In Western Europe, professional associations often carry out the functions of a trade union. In these cases, they may be negotiating for white-collar and/or professional workers, such as physicians, engineers, or teachers. Typically such trade unions refrain from politics or pursue a more liberal politics than their blue-collar counterparts.^[46]

A **union** may acquire the status of a "juristic person" (an artificial legal entity), with a mandate to negotiate with employers for the workers it represents. In such cases, unions have certain legal rights, most importantly the right to engage in collective bargaining with the employer (or employers) over wages, working hours, and other terms and conditions of employment. The inability of the parties to reach an agreement may lead to industrial action, culminating in either strike action or management lockout, or binding arbitration. In extreme cases, violent or illegal activities may develop around these events.

In other circumstances, unions may not have the legal right to represent workers, or the right may be in question. This lack of status can range from non-recognition of a union to political or criminal prosecution of union activists and members, with many cases of violence and deaths having been recorded both historically and contemporarily.^{[47][48]}

Unions may also engage in broader political or social struggle. Social Unionism encompasses many unions that use their organisational strength to advocate for social policies and legislation favourable to their members or to workers in general. As well, unions in some countries are closely aligned with political parties.



A rally of the trade union UNISON in Oxford during a strike on 2006-03-28.

Unions are also delineated by the service model and the organizing model. The service model union focuses more on maintaining worker rights, providing services, and resolving disputes. Alternately, the organizing model typically involves full-time union organizers, who work by building up confidence, strong networks, and leaders within the workforce; and confrontational campaigns involving large numbers of union members. Many unions are a blend of these two philosophies, and the definitions of the models themselves are still debated.

Although their political structure and autonomy varies widely, union leaderships are usually formed through democratic elections.

Some research, such as that conducted by the ACIRRT,^[49] argues that unionized workers enjoy better conditions and wages than those who are not unionized.

In Britain, the perceived left-leaning nature of trade unions has resulted in the formation of a reactionary right-wing trade union called Solidarity which is supported by the far-right BNP. In Denmark, there are some newer apolitical "discount" unions who offer a very basic level of services, as opposed to the dominating Danish pattern of extensive services and organising.^[50]

In contrast, in several European countries (e.g. Belgium, Denmark, the Netherlands, and Switzerland), religious unions have existed for decades. These unions typically distanced themselves from some of the doctrines of orthodox Marxism, such as the preference of atheism and from rhetoric suggesting that employees' interests always are in conflict with those of employers. Some of these Christian unions have had some ties to centrist or conservative political movements and some do not regard strikes as acceptable political means for achieving employees' goals.^[4]

Shop types

Companies that employ workers with a union generally operate on one of several models:

- A **closed shop** (US) or a "pre-entry closed shop" (UK) employs only people who are already union members. The compulsory hiring hall is an example of a closed shop—in this case the employer must recruit directly from the union, as well as the employee working strictly for unionized employers.
- A **union shop** (US) or a "post-entry closed shop" (UK) employs non-union workers as well, but sets a time limit within which new employees must join a union.
- An **agency shop** requires non-union workers to pay a fee to the union for its services in negotiating their contract. This is sometimes called the Rand formula. In certain situations involving state public employees in the United States, such as California, "fair share laws" make it easy to require these sorts of payments.
- An **open shop** does not require union membership in employing or keeping workers. Where a union is active, workers who do not contribute to a union still benefit from the collective bargaining process. In the United States, state level right-to-work laws mandate the open shop in some states. In Germany only open shops are legal; that is, all discrimination based on union membership is forbidden. This affects the function and services of the union. An EU case concerning Italy extended this principle to the rest of the EU in that it stated that, "The principle of trade union freedom in the Italian system implies recognition of the right of the individual not to belong to any trade union ("negative" freedom of association/trade union freedom), and the unlawfulness of discrimination liable to cause harm to non-unionized employees."^[51]

In Britain, also previous to this EU jurisprudence, a series of laws introduced during the 1980s by Margaret Thatcher's government restricted closed and union shops. All agreements requiring a worker to join a union are now illegal. In the United States, the Taft-Hartley Act of 1947 outlawed the closed shop, and the union shop was deemed illegal by the Supreme Court.^[46]

Diversity of international unions

Union law varies from country to country, as does the function of unions. For example, German and Dutch unions have played a greater role in management decisions through participation in corporate boards and co-determination than have unions in the United States.^[52] Moreover, in the United States, collective bargaining is most commonly undertaken by unions directly with employers, whereas in Austria, Denmark, Germany, or Sweden, unions most often negotiate with employers associations.

Concerning labour market regulation in the EU, Gold (1993)^[53] and Hall (1994)^[54] have identified three distinct systems of labour market regulation, which also influence the role that unions play:

“In the **Continental European System** of labour market regulation, the government plays an important role as there is a strong legislative core of employee rights, which provides the basis for agreements as well as a framework for discord between unions on one side and employers or employers’ associations on the other. This model was said to be found in EU core countries such as Belgium, France, Germany, the Netherlands and Italy, and it is also mirrored and emulated to some extent in the institutions of the EU, due to the relative weight that these countries had in the EU until the EU expansion by the inclusion of 10 new Eastern European member states in 2004.

In the **Anglo-Saxon System** of labour market regulation, the government’s legislative role is much more limited, which allows for more issues to be decided between employers and employees and any union and/or employers’ associations which might represent these parties in the decision-making process. However, in these countries, collective agreements are not widespread; only a few businesses and a few sectors of the economy have a strong tradition of finding collective solutions in labour relations. Ireland and the UK belong to this category, and in contrast to the EU core countries above, these countries first joined the EU in 1973.

In the **Nordic System** of labour market regulation, the government’s legislative role is limited in the same way as in the Anglo-Saxon system. However, in contrast to the countries in the Anglo-Saxon system category, this is a much more widespread network of collective agreements, which covers most industries and most firms. This model was said to encompass Denmark, Finland, Norway and Sweden. Here, Denmark joined the EU in 1973, whereas Finland and Sweden joined in 1995.”^[55]

The United States takes a more laissez-faire approach, setting some minimum standards but leaving most workers’ wages and benefits to collective bargaining and market forces. Thus it comes closest to the above **Anglo-Saxon** model. Also the Eastern European countries that have recently entered into the EU come closest to the **Anglo-Saxon** model.

In contrast, in Germany, the relation between individual employees and employers is considered to be asymmetrical. In consequence, many working conditions are not negotiable due to a strong legal protection of individuals. However, the German flavour or works legislation has as its main objective to create a balance of power between employees organized in unions and employers organized in employers associations. This allows much wider legal boundaries for collective bargaining, compared to the narrow boundaries for individual negotiations. As a condition to obtain the legal status of a trade union, employee associations need to prove that their leverage is strong enough to serve as a counterforce in negotiations with employers. If such an employees association is competing against another union, its leverage may be questioned by unions and then evaluated in a court trial. In Germany, only very few professional associations obtained the right to negotiate salaries and working conditions for their members, notably the medical doctors association Marburger Bund and the pilots association Vereinigung Cockpit. The engineers association Verein Deutscher Ingenieure does not strive to act as a union, as it also represents the interests of engineering businesses.

Beyond the classification listed above, unions’ relations with political parties vary. In many countries unions are tightly bonded, or even share leadership, with a political party intended to represent the interests of working people. Typically this is a left-wing, socialist, or social democratic party, but many exceptions exist, including some of the aforementioned Christian unions.^[4] In the United States, by contrast, although it is historically aligned with the

Democratic Party, the union movement is by no means monolithic on that point; this is especially true among the individual "rank and file" members. For example, the International Brotherhood of Teamsters has supported Republican Party candidates on a number of occasions and the Professional Air Traffic Controllers Organization (PATCO) endorsed Ronald Reagan in 1980. In Britain the union movement's relationship with the Labour Party frayed as party leadership embarked on privatisation plans at odds with what unions see as the worker's interests. However, it has strengthened once more after the Labour party's election of Ed Milliband who beat his brother David Milliband, to become leader of the party after Ed secured the trade unions votes. Additionally, in the past there, was been a group known as the Conservative Trade Unionists or CTU. A group formed of people who sympathized with right wing Tory policy but were Trade Unionists.

Historically, the Republic of Korea has regulated collective bargaining by requiring employers to participate but collective bargaining has been legal only if held in sessions before the lunar new year.

Criticisms

Trade unions have been accused of benefiting insider workers, those having secure jobs, at the cost of outsider workers, consumers of the goods or services produced, and the shareholders of the unionized business.^[57]

In the United States, the outsourcing of labour to Asia, Latin America, and Africa has been partially driven by increasing costs of union partnership, which gives other countries a comparative advantage in labour, making it more efficient to perform labour-intensive work there.^[58] Milton Friedman, Nobel economist and advocate of laissez-faire capitalism, sought to show that unionisation produces higher wages (for the union members) at the expense of fewer jobs, and that, if some industries are unionized while others are not, wages will tend to decline in non-unionized industries.^[59]

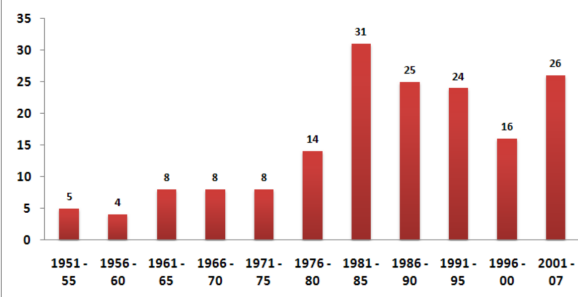
Trade unions have been said to have ineffective policies on racism and sexism, such that a union is justified in not supporting a member taking action against another member. This was demonstrated by the 1987 judgment in the *Weaver v NATFHE* case in the UK, in which a black Muslim woman brought a complaint of workplace racist harassment against a co-trade unionist. The court found that the union, had it offered assistance to the plaintiff, would be in violation of its duty to protect the tenure of the accused member, and this judgment remains the precedent for cases in which union members who make complaints to the employer of racist or sexist harassment against member(s) of the same union cannot obtain union advice or assistance; this applies irrespective of the merit of the complaint.^[60]

International unionisation

The largest trade union federation in the world is the Brussels-based International Trade Union Confederation (ITUC), which has approximately 309 affiliated organisations in 156 countries and territories, with a combined membership of 166 million. The ITUC is a federation of national trade union centres, such as the AFL-CIO in the United States and the Trades Union Congress in the United Kingdom. Other global trade union organisations include the World Federation of Trade Unions.

National and regional trade unions organizing in specific industry sectors or occupational groups also form global union federations, such as Union Network International, the International Transport Workers Federation, the

Percent of Union Election Campaigns with an Illegal Firing, 1951 - 2007



Many union members were illegally fired during the 1980s in the United States due to government opposition to unions.^[56]

International Federation of Journalists or the International Arts and Entertainment Alliance.

Union publications

Several sources of current news exist about the trade union movement in the world. These include LabourStart and the official website of the international trade union movement Global Unions.

Another source of union news is the Workers Independent News, a news organisation providing radio articles to independent and syndicated radio shows in the United States.

A source of international news about unions is RadioLabour which provides daily (Monday to Friday) news reports.

Labor Notes is the largest circulation cross-union publication remaining in the United States. It reports news and analysis about union activity or problems facing the labour movement.

Film

- The 2000 film *Bread and Roses* by British director Ken Loach depicted the struggle of cleaners in Los Angeles to fight for better pay, and working conditions, and the right to join a union.
- *Hoffa*—A Danny DeVito film (1992): The man who was willing to pay the price for power. "Jack Nicholson gives a gigantic powerhouse performance"—*The New York Times*
- The 1985 documentary film *Final Offer* by Sturla Gunnarsson and Robert Collision shows the 1984 union contract negotiations with General Motors.
- The 1979 film *Norma Rae*, directed by Martin Ritt, is based on the true story of Crystal Lee Jordan's successful attempt to unionize her textile factory.
- *Bastard Boys*, a 2007 dramatisation of the 1998 Australian waterfront dispute.
- Other documentaries: *Made in L.A.* (2007); *American Standoff* (2002); *The Fight in the Fields* (1997); *With Babies and Banners: Story of the Women's Emergency Brigade* (1979); *Harlan County, USA* (1976); *The Inheritance* (1964)
- Other dramatisations: *10,000 Black Men Named George* (2002); *Matewan* (1987); *American Playhouse*—"The Killing Floor" (1985); *Salt of the Earth* (1954); *The Grapes of Wrath* (1940); *Black Fury* (1935)

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Further reading

- *The Government of British Trade Unions: A study of Apathy and the Democratic Process in the Transport and General Worker Union* by Joseph Goldstein^[1]
- European Commission, Directorate General for Employment, Social Affairs & Inclusion (2010): *Industrial Relations in Europe 2010*. Brussels, Belgium: European Commission, available at: <http://ec.europa.eu/social/keyDocuments.jsp?type=0&policyArea=0&subCategory=0&country=0&year=0&advSearchKey=IRIE&mode=advancedSubmit&langId=en>
- *The Early English Trade Unions: Documents from Home Office Papers in the Public Record Office* by A. Aspinall^[2]
- *Magnificent Journey: The Rise of the Trade Unions*, by Francis Williams^[3]
- *Trade Unions* by Allan Flanders^[4]
- *Trade Union Government and Administration in Great Britain* by B C Roberts^[5]
- *Union Power: The Growth and Challenge in Perspective* by Claud Cockburn^[6]
- *Directory of Employer's Associations, Trade Unions, Joint Organisations*—No author and produced in paperback^[7]
- *The History of the TUC (Trades Union Congress) 1868–1968: A pictorial Survey of a Social Revolution—Illustrated with Contemporary Prints, Documents and Photographs*, edited by Lionel Birch^[8]
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- Charles A. Orr, "Trade Unionism in Colonial Africa" (<http://www.jstor.org/stable/159416>) *Journal of Modern African Studies*, 4 (1966), pp. 65–81

Notes

- [1] First published by George Allen and Unwin Ltd (London) in 1952, and subject of reprints—Foreword by Arthur Deakin
- [2] Published by Batchworth Press (London) in 1949
- [3] First published by Odhams Press (London) in 1954
- [4] First published by Hutchinson (London) in 1952 and reprinted several times
- [5] First published by The School of Economics/Bell and Sons (London) in 1956 and reprinted
- [6] First published by William Kimber in 1976 (London) ISBN 0-7183-0113-7
- [7] published by HMSO (Her Majesty's Stationery Office) on 1986 ISBN 113612508
- [8] Published in large paperback by Hamlyn/General Council of Trade Union Congress in 1968 with a foreword by George Woodcock

External links

- LabourStart international trade union news service (<http://www.labourstart.org/>)
- RadioLabour (<http://www.radiolabour.net/>)
- New Unionism Network (<http://www.newunionism.net/>)
- Youunionize Global Union Directory (<http://www.youunionize.info/>)

Australia

- Australian Council of Trade Unions (ACTU)- Australian Council of Trade Unions (<http://www.actu.asn.au/>)

Europe

- Trade union membership 1993–2003 (<http://www.eurofound.europa.eu/eiro/2004/03/update/tn0403105u.htm>)—European Industrial Relations Observatory report on membership trends in 26 European countries
- Trade union membership 2003–2008 (<http://www.eurofound.europa.eu/eiro/studies/tn0904019s/tn0904019s.htm>)—European Industrial Relations Observatory report on membership trends in 28 European countries
- Trade Union Ancestors (<http://www.unionancestors.co.uk/>)—Listing of 5,000 UK trade unions with histories of main organisations, trade union "family trees" and details of union membership and strikes since 1900.
- TUC History online (<http://www.unionhistory.info/index.php>)—History of the British union movement
- Trade EU (<http://www.trade-eu.org/>)—European Trade Directory
- Short history of the UGT in Catalonia (http://www.ugt-cat.net/subdominis/ajlleida/index.php?option=com_content&task=view&id=74&Itemid=116)

United States

- Labor rights in the USA (<http://www.workplacefairness.org/index.php?page=retaliationunion>)
 - *Labor Notes* magazine (<http://www.labornotes.org/>)
-

Labour law

Labour law (also called **labor law** or **employment law**) is the body of laws, administrative rulings, and precedents which address the legal rights of, and restrictions on, working people and their organizations. As such, it mediates many aspects of the relationship between trade unions, employers and employees. In Canada, employment laws related to unionized workplaces are differentiated from those relating to particular individuals. In most countries however, no such distinction is made. However, there are two broad categories of labour law. First, **collective labour law** relates to the tripartite relationship between



Labour law concerns the inequality of bargaining power between employers and workers.

employee, employer and union. Second, **individual labour law** concerns employees' rights at work and through the contract for work. The labour movement has been instrumental in the enacting of laws protecting labour rights in the 19th and 20th centuries. Labour rights have been integral to the social and economic development since the Industrial Revolution. **Employment standards** are social norms (in some cases also technical standards) for the minimum socially acceptable conditions under which employees or contractors will work. Government agencies (such as the former U.S. Employment Standards Administration) enforce employment standards codified by labour law (legislative, regulatory, or judicial).

Labour law history

Labour law arose due to the demand for workers to have better conditions, the right to organize, or, alternatively, the right to work without joining a labour union, and the simultaneous demands of employers to restrict the powers of workers' many organizations and to keep labour costs low. Employers' costs can increase due to workers organizing to achieve higher wages, or by laws imposing costly requirements, such as health and safety or restrictions on their free choice of whom to hire. Workers' organizations, such as trade unions, can also transcend purely industrial disputes, and gain political power. The state of labour law at any one time is therefore both the product of, and a component of, struggles between different interests in society.

Individual labour law

Contract of employment

The basic feature of labour law in almost every country is that the rights and obligations of the worker and the employer between one another are mediated through the contract of employment between the two. This has been the case since the collapse of feudalism and is the core reality of modern economic relations. Many terms and conditions of the contract are however implied by legislation or common law, in such a way as to restrict the freedom of people to agree to certain things to protect employees, and facilitate a fluid labour market. In the U.S. for example, majority of state laws allow for employment to be "at will", meaning the employer can terminate an employee from a position

for any reason, so long as the reason is not an illegal reason, including a termination in violation of public policy.^[1] One example in many countries^[2] is the duty to provide written particulars of employment with the *essentialia negotii* (Latin for essential terms) to an employee. This aims to allow the employee to know concretely what to expect and is expected; in terms of wages, holiday rights, notice in the event of dismissal, job description and so on. An employer may not legally offer a contract in which the employer pays the worker less than a minimum wage. An employee may not for instance agree to a contract which allows an employer to dismiss them unfairly. There are certain categories that people may simply not agree to because they are deemed categorically unfair. However, this depends entirely on the particular legislation of the country in which the work is.^[3]

Minimum wage

There may be law stating the minimum amount that a worker can be paid per hour. Australia, Belgium, Brazil, Canada, China, France, Greece, Hungary, India, Ireland, Japan, Korea, Luxembourg, the Netherlands, New Zealand, Paraguay, Portugal, Poland, Romania, Spain, Taiwan, the United Kingdom, the United States, Vietnam and others have laws of this kind. The minimum wage is usually different from the lowest wage determined by the forces of supply and demand in a free market, and therefore acts as a price floor. Each country sets its own minimum wage laws and regulations, and while a majority of industrialized countries has a minimum wage, many developing countries have not.

1. Minimum wages are regulated and stipulated also in some countries that lack specific laws. In Sweden, for instance, minimum wages are negotiated between the labour market parties (unions and employer organisations) through collective agreements that also cover non-union workers and non-organised employers.

Minimum wage laws were first introduced nationally in the United States in 1938,^[4] Brazil in 1940^[5] India in 1948, France in 1950,^[6] and in the United Kingdom in 1998.^[7] In the European Union, 18 out of 25 member states currently have national minimum wages.^[8]

Working time

Before the Industrial Revolution, the workday varied between 11 and 14 hours. With the growth of industrialism and the introduction of machinery, longer hours became far more common, with 14–15 hours being the norm, and 16 not at all uncommon. Use of child labour was commonplace, often in factories. In England and Scotland in 1788, about two-thirds of persons working in the new water-powered textile factories were children.^[9] The eight-hour movement's struggle finally led to the first law on the length of a working day, passed in 1833 in England, limiting miners to 12 hours, and children to 8 hours. The 10-hour day was established in 1848, and shorter hours with the same pay were gradually accepted thereafter. The 1802 Factory Act was the first labour law in the UK.

After England, Germany was the first European country to pass labour laws; Chancellor Bismarck's main goal being to undermine the Social Democratic Party of Germany (SPD). In 1878, Bismarck instituted a variety of anti-socialist measures, but despite this, socialists continued gaining seats in the Reichstag. The Chancellor, then, adopted a different approach to tackling socialism. To appease the working class, he enacted a variety of paternalistic social reforms, which became the first type of social security. The year 1883 saw the passage of the Health Insurance Act, which entitled workers to health insurance; the worker paid two-thirds, and the employer one-third, of the premiums. Accident insurance was provided in 1884, while old age pensions and disability insurance were established in 1889. Other laws restricted the employment of women and children. These efforts, however, were not entirely successful; the working class largely remained unreconciled with Bismarck's conservative government.

In France, the first labour law was voted in 1841. However, it limited only under-age miners' hours, and it was not until the Third Republic that labour law was effectively enforced, in particular after Waldeck-Rousseau 1884 law legalizing trade unions. With the Matignon Accords, the Popular Front (1936–38) enacted the laws mandating 12 days (2 weeks) each year of paid vacations for workers and the law limiting to 40 hours the workweek (outside of overtime).

- *Lochner v. New York*, 198 U.S. 45 (1905), a notorious, and now defunct case by the US Supreme Court that regulation of working time (for bakeries) to limit workers to a 10-hour day.

Health and safety

Other labour laws involve safety concerning workers. The earliest English factory law was passed in 1802 and dealt with the safety and health of child textile workers.

Anti-discrimination

This clause means that discrimination against employees is morally unacceptable and illegal, on a variety of grounds, in particular racial discrimination or sexist discrimination.

Unfair dismissal

Convention no. 158 of the International Labour Organization states that an employee "can't be fired without any legitimate motive" and "before offering him the possibility to defend himself". Thus, on April 28, 2006, after the unofficial repeal of the French First Employment Contract (CPE), the Longjumeau (Essonne) *conseil des prud'hommes* (labour law court) judged the New Employment Contract (CNE) contrary to international law, and therefore "illegitimate" and "without any juridical value". The court considered that the two-years period of "fire at will" (without any legal motive) was "unreasonable", and contrary to convention no. 158, ratified by France.^{[10][11]}

Child labour

Child labour is the employment of children under an age determined by law or custom. This practice is considered exploitative by many countries and international organizations. Child labour was not seen as a problem throughout most of history, only becoming a disputed issue with the beginning of universal schooling and the concepts of labourers' and children's rights. Child labour can be factory work, mining or quarrying, agriculture, helping in the parents' business, having one's own small business (for example selling food), or doing odd jobs. Some children work as guides for tourists, sometimes combined with bringing in business for shops and restaurants (where they may also work as waiters). Other children are forced to do tedious and repetitive jobs such as assembling boxes, or polishing shoes.

However, rather than in factories and sweatshops, most child labour occurs in the informal sector, "selling on the street, at work in agriculture or hidden away in houses — far from the reach of official inspectors and from media scrutiny."^[12]



Two girls wearing banners in Yiddish and English with the slogan "Abolish child slavery!!" at the 1909 May Day parade in New York City

Collective labour law

Collective labour law concerns the tripartite relationship between employer, employee and trade unions. Trade unions, sometimes called "labour unions"

Trade unions

Some countries require unions to follow particular procedures before taking certain actions. For example, some countries require that unions ballot the membership to approve a strike or to approve using members' dues for political projects. Laws may guarantee the right to join a union (banning employer discrimination), or remain silent in this respect. Some legal codes may allow unions to place a set of obligations on their members, including the

requirement to follow a majority decision in a strike vote. Some restrict this, such as the 'right to work' legislation in some of the United States.

Strikes

Strike action is the weapon of the workers most associated with industrial disputes, and certainly among the most powerful. In most countries, strikes are legal under a circumscribed set of conditions. Among them may be that:

- The strike is decided on by a prescribed democratic process. (Wildcat strikes are illegal).
- Sympathy strikes, against a company by which workers are not directly employed, may be prohibited.
- General strikes may be forbidden by a public order.
- Certain categories of person may be forbidden to strike (airport personnel, health personnel, teachers, police or firemen, etc.)

A boycott is a refusal to buy, sell, or otherwise trade with an individual or business who is generally believed by the participants in the boycott to be doing something morally wrong. Throughout history, workers have used tactics such as the go-slow, sabotage, or just not turning up en-masse to gain more control over the workplace environment, or simply have to work less [13]. Some labour law explicitly bans such activity, none explicitly allows it.

Pickets

Picketing is a tactic which is often used by workers during strikes. They may congregate outside the business they are striking against to make their presence felt, increase worker participation, and dissuade (or prevent) strike breakers from entering the workplace. In many countries, this activity is restricted by labour law, by more general law restricting demonstrations, or sometimes by injunctions on particular pickets. For example, labour law may restrict secondary picketing (picketing a business not directly connected with the dispute, such as a supplier of materials), or flying pickets (mobile strikers who travel to join a picket). There may be laws against obstructing others from going about their lawful business (scabbing, for example, is lawful); making obstructive pickets illegal, and, in some countries, such as Britain, there may be court orders made from time to time against pickets being in particular places or behaving in particular ways (shouting abuse, for example).

Workplace involvement

Workplace consultation statutes exist in many countries, requiring that employers consult their workers on issues that concern their place in the company. Industrial democracy refers to the same idea, but taken much further. Not only that workers should have a voice to be listened to, but that workers have a vote to be counted.

Co-determination

Originating in Germany, some form of co-determination (or *Mitbestimmung*) procedure is practised in countries across continental Europe, such as Holland and the Czech Republic, as well as Scandinavian countries (e.g. Sweden). This involves the rights of workers to be represented on the boards of companies for whom they work. The German model involves half the board of directors being appointed by the company trade union. However, German company law uses a split board system, with a 'supervisory board' (*Aufsichtsrat*) which appoints an 'executive board' (*Vorstand*). Shareholders and unions elect the supervisory board in equal number, except that the head of the supervisory board is, under co-determination law, a shareholder representative. While not gaining complete parity, there has been solid political consensus since the Helmut Schmidt social democrat government introduced the



Strikers gathering in Tyldesley in the 1926
General Strike in the U.K.

measure in 1976.

In the United Kingdom, the similar proposals were drawn up, and a command paper produced named the Bullock Report (Industrial democracy). This was released in 1977 by the James Callaghan Labour government. This proposal involved a similar split on the board, but its effect would have been even more radical. Because British company law requires no split in the boards of directors, unions would have directly elected the management of the company. Furthermore, rather than giving shareholders the slight upper hand as happened in Germany, a debated 'independent' element would be added to the board, reaching the formula $2x + y$. However, no action was ever taken as the UK slid into the winter of discontent. This tied into the European Commission's proposals for worker participation in the 'fifth company law directive', which was also never implemented.

In Sweden, this is regulated through the 'Law on board representation' (Lagen om styrelsrepresentation). The law covers all private companies with 25 or more employees. In these companies, workers (usually through unions) have a right to appoint two board members and two substitutes. If the company has more than 1,000 employees, three members and three substitutes are appointed by workers/unions. It is common practice that seats are divided between representatives from the major union coalitions.

International labour law

One of the crucial concerns of workers and those that believe that labour rights are important, is that in a globalizing economy, common social standards ought to support economic development in common markets. However, there is nothing in the way of international enforcement of labour rights, with the notable exception of labour law within the European Union. At the Doha round of trade talks through the World Trade Organization one of the items for discussion was the inclusion of some kind of minimum standard of worker protection. The chief question is whether, with the breaking down of trade barriers in the international economy, while this can benefit consumers it can also make the ability of multinational companies to bargain down wage costs even greater, in wealthier Western countries and developing nations alike. The ability of corporations to shift their supply chains from one country to another with relative ease could be the starting gun for a "regulatory race to the bottom", whereby nation states are forced into a merciless downward spiral, not only slashing tax rates and public services with it but also laws that in the short term cost employers money. Countries are forced to follow suit, on this view, because should they not foreign investment will dry up, move places with lower "burdens" and leave more people jobless and poor. This argument is by no means uncontested. The opposing view suggests that free competition for capital investment between different countries increases the dynamic efficiency of the market place. Faced with the discipline that markets enforce, countries are incentivized to invest in education, training, and skills in their workforce to obtain a comparative advantage. Government initiative is spurred, because rational long term investment will be perceived as the better choice to increasing regulation. This theory concludes that an emphasis on deregulation is more beneficial than not. That said, neither the International Labour Organization (see below), nor the European Union takes this view.

International Labour Organization

The International Labour Organization (ILO), whose headquarters are in Geneva, is one of the oldest surviving international bodies, and the only surviving international body set up at the time of the League of Nations following the First World War. Its guiding principle is that "labour is not a commodity" to be traded in the same way as goods, services or capital, and that human dignity demands equality of treatment and fairness in dealing within the workplace.^[14] The ILO is unique in structure in the United Nations system with decision making carried out through tripartism between government, employer and worker representatives. The ILO elaborates labour Conventions which define international labour standards. National governments then ratify the Conventions as international treaties and incorporate the Conventions into national law.

European labour law

The European Working Time Directive limited the maximum length of a working week to 48 hours in 7 days, and a minimum rest period of 11 hours in each 24 hours. Like all EU Directives, this is an instrument which requires member states to enact its provisions in national legislation. Although the directive applies to all member states, in the UK it is possible to "opt out" of the 48-hour working week to work longer hours. In contrast, France has passed more strict legislation, limiting the maximum working week to 35 hours (but optional hours are still possible). The controversial Directive on services in the internal market (aka "Bolkestein Directive") was then passed in 2006.

National labour law

British labour law

The Factory Acts (first one in 1802, then 1833) and the 1832 Master and Servant Act were the first laws regulating labour relations in the United Kingdom. The vast majority of employment law before 1960 was based upon the Law of Contract. Since then there has been a significant expansion primarily due to the "equality movement" and the European Union. There are three sources of Law: Acts of Parliament called Statutes, Statutory Regulations (made by a Secretary of State under an Act of Parliament) and Case Law (developed by various Courts).

The first significant modern day Employment Law Act was the Equal Pay Act of 1970 although as it was a somewhat radical concept it did not come into effect until 1972. This act was introduced as part of a concerted effort to bring about equality for women in the workplace. Since the election of the Labour Government in 1997, there have been many changes in UK employment law. These include enhanced maternity and paternity rights, the introduction of a National Minimum Wage and the Working Time Directive which covers working time, rest breaks and the right to paid annual leave. Discrimination law has also been tightened, with protection from discrimination now available on the grounds of age, religion or belief and sexual orientation as well as gender, race and disability.

Canadian labour law

In Canadian law, 'labour law' refers to matters connected with unionized workplaces, while 'employment law' deals with non-unionised employees.

Chinese labour law

Labour Law in the People's Republic of China has become a very hot issue with the soaring numbers of factories and the fast pace of urbanization. The basic labour laws are the Labour Law of People's Republic of China (promulgated on 5 July 1994) and the Law of the People's Republic of China on Employment Contracts (Adopted at the 28th Session of the Standing Committee of the 10th National People's Congress on June 29, 2007, Effective from January 1, 2008). The administrative regulations enacted by the State Council, the ministerial rules and the judicial explanations of the Supreme People's Court stipulate detailed rules concerning the various aspects of the employment relationship. Labour Union in China is controlled by the government through the All China Federation of Trade Unions, which is also the sole legal labour union in Mainland China. Strike is formally legal, but in fact is discouraged.

French labour law

In France the first labour laws were Waldeck Rousseau's laws passed in 1884. Between 1936 and 1938 the Popular Front enacted a law mandating 12 days (2 weeks) each year of paid vacation for workers, and a law limiting the work week to 40 hours, excluding overtime. The Grenelle accords negotiated on May 25 and 26th in the middle of the May 1968 crisis, reduced the working week to 44 hours and created trade union sections in each enterprise.^[15] The minimum wage was also increased by 25%.^[16] In 2000 Lionel Jospin's government then enacted the 35-hour workweek, down from 39 hours. Five years later, conservative prime minister Dominique de Villepin enacted the

New Employment Contract (CNE). Addressing the demands of employers asking for more flexibility in French labour laws, the CNE sparked criticism from trade unions and opponents claiming it was lending favour to contingent work. In 2006 he then attempted to pass the First Employment Contract (CPE) through a vote by emergency procedure, but that it was met by students and unions' protests. President Jacques Chirac finally had no choice but to repeal it.

Mexican labour law

Mexican labour law governs the process by which workers in Mexico may organize labour unions, engage in collective bargaining, and strike. Current labour law reflects the historic interrelation between the state and the Confederation of Mexican Workers, the labour confederation officially aligned with the Institutional Revolutionary Party (the Institutional Revolutionary Party, or PRI), which ruled Mexico under various names for more than seventy years. While the law, on its face, promises workers the right to strike and to organize, in practice it makes it difficult or impossible for independent unions to organize while condoning the corrupt practices of many existing unions and the employers with which they deal.

Swedish labour law

Swedish labour law is from an international perspective comparatively 'thin'. This is because many of the issues and areas that in other countries are regulated through state or federal law, e.g. working hours, minimum wage and right to overtime compensation, in Sweden instead are regulated through collective agreements between trade union and employer organisation representatives.

United States labor law

The Fair Labor Standards Act of 1938 set the maximum standard work week to 44 hours, and in 1950 this was reduced to 40 hours. The green cards entitle legal immigrants to work just like US citizens, without requirement of work permits. Despite the 40-hour standard maximum work week,^[17] some lines of work require more than 40 hours to complete the tasks of the job. For example, if you prepare agricultural products for market you can work over 72 hours a week, if you want to, but you cannot be required to. If you harvest products you must get a period of 24 hours off after working up to 72 hours in a seven-day period. There are exceptions to the 24-hour break period for certain harvesting employees, like those involved in harvesting grapes, tree fruits and cotton. Professionals, clerical (administrative assistants), technical, and mechanical employees cannot be terminated for refusing to work more than 72 hours in a work week. These high-hour ceilings, combined with a competitive job market, often motivate American workers to work more hours than required. American workers consistently take fewer vacation days than their European counterparts, and on average take the fewest days off of any developed country.^[18]



An American builder

The Fifth and Fourteenth Amendments of the United States Constitution limit the power of the federal and state governments to discriminate. The private sector is not directly constrained by the Constitution, but several laws, particularly the Civil Rights Act of 1964, limit the ability of the private sector to discriminate against certain classes in employment. The Fifth Amendment^[19] has an explicit requirement that the Federal Government not deprive individuals of "life, liberty, or property", without due process of the law and an implicit guarantee that each person receive equal protection of the laws. The Fourteenth Amendment^[20] explicitly prohibits states from violating an

individual's rights of due process and equal protection. Equal protection limits the State and Federal governments' power to discriminate in their employment practices by treating employees, former employees, or job applicants unequally because of membership in a group, like a race, religion or sex. Due process protection requires that employees have a fair procedural process before they are terminated if the termination is related to a "liberty", like the right to free speech, or a property interest.

The Age Discrimination in Employment Act of 1967 prohibits employment discrimination based on age with respect to employees 40 years of age or older. This Act was created to promote employment of older persons based on their ability rather than age; to prohibit arbitrary age discrimination in employment; to help employers and workers find ways of meeting problems arising from the impact of age on employment because in the face of rising productivity and affluence, older workers find themselves disadvantaged in their efforts to retain employment, and especially to regain employment when displaced from jobs; the setting of arbitrary age limits regardless of potential for job performance has become a common practice, and certain otherwise desirable practices may work to the disadvantage of older persons; the incidence of unemployment, especially long-term unemployment with resultant deterioration of skill, morale, and employer acceptability is, relative to the younger ages, high among older workers; their numbers are great and growing; and their employment problems grave; and the existence in industries affecting commerce, of arbitrary discrimination in employment because of age, burdens commerce and the free flow of goods in commerce.

Title VII of the Civil Rights Act^[21] is the principal federal statute with regard to employment discrimination prohibiting unlawful employment discrimination by public and private employers, labour organizations, training programmes and employment agencies based on race or colour, religion, sex, and national origin. Retaliation is also prohibited by Title VII^[22] against any person for opposing any practice forbidden by statute, or for making a charge, testifying, assisting, or participating in a proceeding under the statute. The Civil Rights Act of 1991 expanded the damages available to Title VII^[23] cases and granted Title VII^[24] plaintiffs the right to jury trial.

The National Labor Relations Act, enacted in 1935 as part of the New Deal legislation, guarantees workers the right to form unions and engage in collective bargaining. This legislation and its subsequent amendments are also key elements of U.S. labour law.

Notes

- [1] For example, an employee's refusal to violate law or an employee's assertion of rights.
- [2] e.g. In the European Union, Directive 91/533
- [3] In the US, under the National Labor Relations Act, a worker has no right to organize where he is considered a manager, see *NLRB v. Kentucky River Community Care*, 532 U.S. 706 (<http://www.lawmemo.com/nlr/kyrivercases.htm>) (2001)
- [4] "History of Federal Minimum Wage Rates Under the Fair Labor Standards Act, 1938 - 1996" (<http://www.dol.gov/esa/minwage/chart.htm>). Department of Labor. March 31, 2006. .
- [5] Senado.gov.br (<http://www6.senado.gov.br/legislacao/ListaPublicacoes.action?id=37717>)
- [6] "Minimum wage (guaranteed)" (<http://www.eurofound.eu.int/emire/France/MINIMUMWAGEGUARANTEED-FR.html>). European Foundation for the Improvement of Living and Working Conditions. March 31, 2006. .
- [7] "National Minimum Wage" (<http://www.dti.gov.uk/er/nmw/nmwhist.htm>). dti. March 31, 2006. .
- [8] Eurostat (2005): *Minimum Wages 2005: Major Differences between EU Member States* (PDF) (http://www.eds-destatis.de/en/downloads/sif/nk_05_07.pdf)
- [9] Child Labor and the Division of Labor in the Early English Cotton Mills (<http://www.galbithink.org/child.htm>)
- [10] **(French)** "Un contrat en CNE jugé contraire au droit international" (http://today.reuters.fr/news/newsArticle.aspx?type=topNews&storyID=2006-04-28T165412Z_01_TOU860781_RTRIDST_0_OFRTF-FRANCE-EMPLOI-CNE-TRIBUNAL-20060428.XML). Reuters. April 28, 2006. . Retrieved 2006-05-05.
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- [13] <http://www.af-north.org/lordstown.html>
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- [15] Section syndicale d'entreprise (*French*) December 27, 1968 law
- [16] SMIG (*French*)
- [17] Deskinlawfirm.com (http://deskinlawfirm.com/working_more_than_72_hours_in_a_week_cannot_be_required)
- [18] Infoplease.com (<http://www.infoplease.com/ipa/A0922052.html>)
- [19] Finduslaw.com (http://finduslaw.com/us_constitution_5th_and_14th_amendments#1)
- [20] Finduslaw.com (http://finduslaw.com/us_constitution_5th_and_14th_amendments#2)
- [21] Finduslaw.com (http://finduslaw.com/civil_rights_act_of_1964_cra_title_vii_equal_employment_opportunities_42_us_code_chapter_21)
- [22] Finduslaw.com (http://finduslaw.com/civil_rights_act_of_1964_cra_title_vii_equal_employment_opportunities_42_us_code_chapter_21)
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- [24] Finduslaw.com (http://finduslaw.com/civil_rights_act_of_1964_cra_title_vii_equal_employment_opportunities_42_us_code_chapter_21)

Further reading

- Stephen F. Befort and John W. Budd, *Invisible Hands, Invisible Objectives: Bringing Workplace Law and Public Policy Into Focus* (2009) Stanford University Press
- Norman Selwyn, *Selwyn's Law of Employment* (2008) Oxford University Press
- Simon Honeyball, *Honeyball and Bowers' Textbook on Employment Law* (2008) Oxford University Press
- Keith Ewing, Aileen McColgan and Hugh Collins, *Labour Law, Cases, Texts and Materials* (2005) Hart Publishing
- Simon Deakin and Gillian Morris, *Labour Law* (2005) Hart Publishing ISBN 978-1-84113-560-1
- Keshawn Walker and Arn Morell, "*Labor and Employment: Workplace Warzone*", Georgetown University Thesis (2005)

External links

- Labour Legislation (http://www.1911encyclopedia.org/Labour_Legislation) from 1911encyclopedia.org, *Encyclopædia Britannica's* 1911 edition
 - California Labor Code (http://finduslaw.com/california_labor_code)
 - HG.org States Labor Departments and Law (<http://www.hg.org/employ.html#states/>)
 - Indian Labor Law (<http://www.lawisgreek.com/category/other-indian-laws/labour-laws>)
 - Labor law attorneys (<http://overtime.com/blog/overtime/labor-law-attorneys/>)
 - EU Labour Law (<http://www.fedee.com/employment-law/>)
-

Payroll

In a company, **payroll** is the sum of all financial records of salaries for an employee, wages, bonuses and deductions. In accounting, payroll refers to the amount paid to employees for services they provided during a certain period of time. Payroll plays a major role in a company for several reasons. From an accounting perspective, payroll is crucial because payroll and payroll taxes considerably affect the net income of most companies and they are subject to laws and regulations (e.g. in the US payroll is subject to federal and state regulations). From an ethics in business viewpoint payroll is a critical department as employees are responsive to payroll errors and irregularities: good employee morale requires payroll to be paid timely and accurately. The primary mission of the payroll department is to ensure that all employees are paid accurately and timely with the correct withholdings and deductions, and to ensure the withholdings and deductions are remitted in a timely manner. This includes salary payments, tax withholdings, and deductions from a paycheck.

John Lewis plc

October 2007

NZ Number: [redacted]
 Tax Code/Status: [redacted]
 NZ Contributions: Full
 Tax Month: 07

Payment Method: BACS
 Payrate: [redacted] per hour

PAYMENTS		DEDUCTIONS		CUMULATIVE FIGURES	
Contractual Pay	975.00	Tax	96.28	This Tax Year:	668.76
		National Insurance	20.41	Transfer Pay	683.86
				NI Employee	426.81
				This Trading Year:	
				PS Ranking Pay	8789.68
				BALANCES	
Total Gross Pay:	975.00	Total Deductions:	116.69	Net Pay:	858.31

MESSAGES

Is your life assurance nomination form up to date? Form free Personnel/HR Personnel in UK branches.

Handling payroll typically involves sending out payslips to employees.

Payroll taxes

Government agencies at various levels require employers to withhold income taxes from employees' wages.^[1]

In the United States, "payroll taxes" are separate from income taxes, although they are levied on employers in proportion to salary; the programs they fund include Social Security, and Medicare. U.S. income and payroll taxes collected through deductions are considered to be trust fund taxes, because the employer holds the deducted money in trust for later remittance.

Payroll taxes in U.S.

Before considering the payroll taxes we need to talk about the Basic Formula for the Net Pay. Basically from gross pay is subtracted one or more deductions to arrive at the Net Pay. In fact Employee's gross pay (pay rate times number of hours worked, including any over time) minus payroll tax deductions, minus voluntary payroll deductions, is equal to Net Pay. As you can see payroll tax deductions play a critical role and just because they are provided by law we can call them Statutory payroll tax deductions.

The employer must withhold payroll taxes from an employee's check and hand them over to several tax agencies by law. Payroll taxes include:

1. Federal income tax withholding, based on withholding tables in "Publication 15, Employer's Tax Guide"^[2] by Internal Revenue Service - IRS;
2. Social Security tax withholding.^[3] The employee pays 6.2 percent of the salary or wage, up to 110,100 (as of 2012). The employer also pays 6.2 percent in Social Security taxes. If you are self-employed, you pay the combined employee and employer amount of 12.4 percent in Social Security taxes on your net earnings;
3. Medicare tax.^[4] The employee pays 1.45 percent in Medicare taxes on the entire salary or wage. The employer also pays 1.45 percent in Medicare taxes. If you are self-employed, you pay the combined employee and employer amount of 2.9 percent in Medicare taxes on your net earnings;
4. State income tax withholding;
5. various local tax withholding, such as city taxes, county taxes, school taxes, state disability, and unemployment insurance.

As for the sources considered as references we can mention the following publications:

- Publication 15, (Circular E), Employer's Tax Guide. This publication explains employer's tax responsibilities. It explains the requirements for withholding, depositing, reporting, paying, and correcting employment taxes. It explains the forms any employer must give to its employees, those employees must give to the employer, and those employer must send to the IRS and SSA (Social Security Administration). This guide also has tax tables needed to figure the taxes to withhold from each employee;
- Publication 15 - A, Employer's Supplemental Tax Guide. This publication supplements Publication 15 (Circular E), Employer's Tax Guide. It contains specialized and detailed employment tax information supplementing the basic information provided in Publication 15 (Circular E);
- Publication 15-B. Employer's Tax Guide to Fringe Benefits. This publication supplements Publication 15 (Circular E), Employer's Tax Guide, and Publication 15 - A, Employer's Supplemental Tax Guide. This publication contains information about the employment tax treatment of various types of noncash compensation.

In the earlier part we have considered payroll taxes related to employee's side. Now it's the moment to talk about the Employer Payroll Taxes Employers are responsible for paying their portion of payroll taxes. These payroll taxes are an expense over and above the expense of an employee's gross pay. The employer-portion of payroll taxes include the following:

1. Social Security taxes (6.2% up to the annual maximum);
2. Medicare taxes (1.45% of wages);
3. Federal unemployment taxes (FUTA);
4. State unemployment taxes (SUTA).

Very often you can hear people using FICA in their terminology. FICA stands for the Federal Insurance Contributions Act and the FICA tax consists of both Social Security and Medicare taxes. As we explained earlier both parties pay half of these taxes. Employees pay half, and employers pay the other half. Social Security and Medicare taxes are paid both by the employees and the employers. In summary together both halves of the FICA taxes add up to 15.3 percent.

Any employer is responsible for paying the employer's share of payroll taxes, for depositing tax withheld from the employees' paychecks, preparing various reconciliation reports, accounting for the payroll expense through their financial reporting, and filing payroll tax returns. As you see this suite of employer payroll tax responsibilities is far above issuing paychecks to employees.

Frequency

Companies typically generate their payrolls at regular intervals, for the benefit of regular income to their employees. The regularity of the intervals, though, varies from company to company, and sometimes between job grades within a given company. Common payroll frequencies include: daily, weekly, bi-weekly (once every two weeks), semi-monthly (twice per month), and to a somewhat lesser extent, monthly. Less common payroll frequencies include: 4-weekly (13 times per year), bi-monthly (once every two months), quarterly (once every 13 weeks), semi-annually (twice per year), and annually.

Outsourcing

Businesses may decide to outsource their payroll functions to an outsourcing service like a Payroll service bureau or a fully managed payroll service. These can normally reduce the costs involved in having payroll trained employees in-house as well as the costs of systems and software needed to process a payroll. In many countries, business payrolls are complicated in that taxes must be filed consistently and accurately to applicable regulatory agencies. Restaurant payrolls which typically include tip calculations, deductions, garnishments and other variables, can be difficult to manage especially for new or small business owners.

In the UK, payroll bureaus will deal with all HM Revenue & Customs inquiries and deal with employee's queries. Payroll bureaus also produce reports for the businesses' account department and payslips for the employees and can also make the payments to the employees if required.

Another reason many businesses outsource is because of the ever increasing complexity of payroll legislation. Annual changes in tax codes, *Pay as you earn* (PAYE) and National Insurance bands as well as statutory payments and deductions having to go through the payroll often mean there is a lot to keep abreast of in order to maintain compliance with the current legislation.

Footnotes

[1] "Introduction to Payroll Taxes." (http://payroll.intuit.com/payroll_resources/payroll_101/index.jsp). .

[2] Publication 15 (2010), (Circular E), Employer's Tax Guide

[3] SSA Publication No. 05-10003, January 2010, ICN 451385

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References

- Institute of Payroll Professionals official website (<http://www.payrollprofession.org>)
- Glossary of Accounting Terms (http://a-z-dictionaries.com/glossaries/Accounting_Glossary.html)
- Steven M. Bragg. *Essentials of Payroll: Management and Accounting*. ISBN 0-471-26496-2.
- Independent research, seminars and consulting on multi-country payroll (<http://www.websterb.com/>)
- Direct Deposit information resource (<http://www.nacha.org>)
- Publication 15 (2010)(Circular E) Employer's Tax Guide (<http://www.irs.gov/publications/p15/index.html>)

Employee benefit

Employee benefits and (especially in British English) **benefits in kind** (also called **fringe benefits**, **perquisites**, **perqs** or **perks**) are various non-wage compensations provided to employees in addition to their normal wages or salaries.^[1] In instances where an employee exchanges (cash) wages for some other form of benefit is generally referred to as a 'salary packaging' or 'salary exchange' arrangement. In most countries, most kinds of employee benefits are taxable to at least some degree.

Examples of these benefits include: housing (employer-provided or employer-paid), group insurance (health, dental, life etc.), disability income protection, retirement benefits, daycare, tuition reimbursement, sick leave, vacation (paid and non-paid), social security, profit sharing, funding of education, and other specialized benefits.

The purpose of employee benefits is to increase the economic security of staff members, and in doing so, improve worker retention across the organization.^[2]

The term **perqs** (also **perks**) is often used colloquially to refer to those benefits of a more discretionary nature. Often, perqs are given to employees who are doing notably well and/or have seniority. Common perqs are take-home vehicles, hotel stays, free refreshments, leisure activities on work time (golf, etc.), stationery, allowances for lunch, and—when multiple choices exist—first choice of such things as job assignments and vacation scheduling. They may also be given first chance at job promotions when vacancies exist.

Canada

Employee benefits in Canada might include additional health coverage that is not included in the provincial plan (such as medical, prescription, vision and dental plans); Group Disability (STD/LTD), Employee Assistance Plans (EAP), Group Term Life & Accidental Death & Dismemberment, health and dependent care; retirement benefit plans (in addition to Canada Pension Plan (CPP)); and long term care insurance plans; legal assistance plans; transportation benefits; and possibly other miscellaneous employee discounts: wellness programs, discounted shopping, hotels and resorts, and so on.

United States

Employee benefits in the United States might include relocation assistance; medical, prescription, vision and dental plans; health and dependent care flexible spending accounts; retirement benefit plans (pension, 401(k), 403(b)); group-term life and long term care insurance plans; legal assistance plans; adoption assistance; child care benefits and transportation benefits. Benefits may also include formal or informal employee discount programs that grant workers access to specialized offerings from local and regional vendors (*e.g.*, movies and theme park tickets, wellness programs, discounted shopping, hotels and resorts, and so on).^[3] Companies who offer these types of work-life perks seek to raise employee satisfaction, corporate loyalty, and worker retention by providing valuable benefits that go beyond a base salary figure.^[4]

Some fringe benefits (for example, accident and health plans, and group-term life insurance coverage up to US\$50,000) may be excluded from the employee's gross income and, therefore, are not subject to federal income tax in the United States. Some function as tax shelters (for example, flexible spending accounts, 401(k)'s, 403(b)'s). Fringe benefits are also thought of as the costs of keeping employees other than salary. These benefit rates are typically calculated using fixed percentages that vary depending on the employee's classification and often change from year to year.

Normally, employer-provided benefits are tax-deductible to the employer and non-taxable to the employee. The exception to the general rule includes certain executive benefits (*e.g.* golden handshake and golden parachute plans).

American corporations may also offer cafeteria plans to their employees. These plans would offer a menu and level of benefits for employees to choose from. In most instances, these plans are funded by both the employees and by the employer(s). The portion paid by the employees is deducted from their gross pay before federal and state taxes are applied. Some benefits would still be subject to the Federal Insurance Contributions Act tax (FICA), such as 401(k)^[5] and 403(b) contributions; however, health premiums, some life premiums, and contributions to flexible spending accounts are exempt from FICA.

If certain conditions are met, employer provided meals and lodging may be excluded from an employee's gross income. If meals are furnished (1) by the employer; (2) for the employer's convenience; and (3) provided on the business premises of the employer they may be excluded from the employee's gross income per Section 119(a). In addition, lodging furnished by the employer for its convenience on the business premise of the employer (which the employee is required to accept as a condition of employment) is also excluded from gross income. Importantly, section 119(a) only applies to meals or lodging furnished "in kind." Therefore, cash allowances for meals or lodging received by an employee are included in gross income .

The term "fringe benefits" was coined by the War Labor Board during World War II to describe the various indirect benefits which industry had devised to attract and retain labor when direct wage increases were prohibited.

Employee benefits provided through ERISA are not subject to state-level insurance regulation like most insurance contracts, but employee benefit products provided through insurance contracts are regulated at the state level.^[6] However, ERISA does not generally apply to plans by governmental entities, churches for their employees, and some other situations.^[7]

United Kingdom

In the UK, Employee Benefits are categorised by three terms: Flexible Benefits (Flex) and Flexible Benefits Packages, Voluntary Benefits and Core Benefits.

Core Benefits is the term given to benefits which all staff enjoy, such as pension, life insurance, income protection, and holiday.

Flexible benefits, often called a "flex scheme", is where employees are allowed to choose how a proportion of their remuneration is paid or they are given a benefits budget by their employer to spend. Currently around a third of UK employers operate such a scheme.^[8] How flexible benefits schemes are structured has remained fairly consistent over the years, although the definition of flex has changed quite a lot since it first arrived in the UK in the 1980s. When flex first emerged, it was run as a formal scheme for a set contract period, through which employees could opt in and out of a selection of employer-paid benefits, select employee-paid benefits, or take the cash. In recent years increasing numbers of UK companies have used the tax and national insurance savings gained through the implementation of salary sacrifice benefits to fund the implementation of flexible benefits. In a salary sacrifice arrangement an employee gives up the right to part of the cash remuneration due under their contract of employment. Usually the sacrifice is made in return for the employer's agreement to provide them with some form of non-cash benefit. The most popular types of salary sacrifice benefits include childcare vouchers and pensions.

A number of external consultancies exist that enable organizations to manage Flex packages and they centre around the provision of an Intranet or Extranet website where employees can view their current flexible benefit status and make changes to their package. Adoption of flexible benefits has grown considerably over the five years to 2008, with The Chartered Institute of Personnel and Development. This has coincided with increased employee access to the internet and studies suggesting that employee engagement can be boosted by their successful adoption.^[9]

Voluntary Benefits is the name given to a collection of benefits that employees choose to opt-in for and pay for personally, although, as with flex plans, many employers make use of salary sacrifice schemes where the employee reduces their salary in exchange for the employer paying for the perq. These tend to include benefits such as the government-backed (and therefore tax-efficient) cycle to work, pension contributions and childcare vouchers (Accor Services, Busybees, Sodexo, Fideliti, KiddiVouchers, Imagine, Early Years Vouchers Ltd) and also specially arranged discounts on retail and leisure vouchers, gym membership and discounts at local shops and restaurants. They can be run in-house or arranged by an external employee benefits consultant.

Fringe benefits tax

In a number of countries (e.g., Australia, New Zealand and Pakistan) the 'fringe benefits' are subject to the Fringe Benefits Tax (FBT), which applies to most, although not all, fringe benefits. In India, the fringe benefits tax was abolished in 2009.^[10]

In the United States, employer-sponsored health insurance was considered taxable income until 1954.^[11]

Disadvantages

In the UK these benefits are often taxed at the individual's normal tax rate,^[12] which can prove expensive if there is no financial advantage to the individual from the benefit.

The UK system of state pension provision is dependent upon the payment of National Insurance Contributions (NIC). Salary exchange schemes will result in reduced NIC payments and so are also liable to reduce the state benefits, most notably the state second pension.

References

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- [2] Abenity: What Does It Cost To Replace An Employee? (<http://www.abenity.com/celebrate/archives/3030>)
- [3] Abenity: What Is An Employee Discount Program? (<http://www.abenity.com/celebrate/archives/2435>)
- [4] Abenity: What Is An Employee Discount Program? (<http://www.abenity.com/celebrate/archives/2435>)
- [5] <http://www.irs.gov/taxtopics/tc424.html>
- [6] Ford J. (1995). State-Mandated Employee Benefits: Conflict with Federal Law? (<http://www.questia.com/googleScholar.qst?sessionid=LvJpWQQ1BJ8RnTYsWvP4V7sQbbM0RS5nyghhYKTyVdvZD5LpLLMg!-99814901!-1553468468?docId=5000140154>). *Monthly Labor Review*.
- [7] U.S. DOL. <http://www.dol.gov/dol/topic/health-plans/erisa.htm> Health Plans & Benefits Employee Retirement Income Security Act — ERISA].
- [8] March 7, 2011 author Employee Benefits magazine (<http://www.employeebenefits.co.uk/item/12353/23/5/3>)
- [9] Personnel Today: Reward and benefits of perks over pay rises for improving employee engagement (<http://www.personneltoday.com/articles/2007/11/26/43403/reward-and-benefits-performance-of-perks-over-pay-rises-for-improving-employee-engagement.html>)
- [10] "New income-tax rules on perks to replace FBT notified" (<http://www.hindu.com/2009/12/22/stories/2009122257171400.htm>). *The Hindu* (Chennai, India). 22 December 2009. .
- [11] Employer-Sponsored Health Insurance and Health Reform (<http://www.nber.org/aginghealth/2009no2/w14839.html>) at National Bureau of Economic Research.
- [12] 490 (2008) Employee Travel - A tax and NICs guide for employers (<http://www.hmrc.gov.uk/helpsheets/490.pdf>)

External links

- Website for UK based Employee Benefits magazine, published by Centaur (<http://www.employeebenefits.co.uk/>)
- Fundamentals of Employee Benefit Programs (book available on-line), Employee Benefits Research Institute (EBRI), covers benefit programs in the US (<http://www.ebri.org/publications/books/index.cfm?fa=fundamentals>)

Business

A **business** (also known as **enterprise** or **firm**) is an organization engaged in the trade of goods, services, or both to consumers.^[1] Businesses are predominant in capitalist economies, where most of them are privately owned and administered to earn profit to increase the wealth of their owners. Businesses may also be not-for-profit or state-owned. A business owned by multiple individuals may be referred to as a company, although that term also has a more precise meaning.

The etymology of "business" relates to the state of being busy either as an individual or society as a whole, doing commercially viable and profitable work. The term "business" has at least three usages, depending on the scope — the singular usage to mean a particular organization; the generalized usage to refer to a particular market sector, "the music business" and compound forms such as agribusiness; and the broadest meaning, which encompasses all activity by the community of suppliers of goods and services. However, the exact definition of business, like much else in the philosophy of business, is a matter of debate and complexity of meanings.

Basic forms of ownership

Although forms of business ownership vary by jurisdiction, there are several common forms which are as follows:

- **Sole proprietorship:** A sole proprietorship is a business owned by one person for-profit. The owner may operate the business alone or may employ others. The owner of the business has unlimited liability for the debts incurred by the business.
- **Partnership:** A partnership is a business owned by two or more people. In most forms of partnerships, each partner has unlimited liability for the debts incurred by the business. The three typical classifications of for-profit partnerships are general partnerships, limited partnerships, and limited liability partnerships.
- **Corporation:** A corporation is a limited liability business that has a separate legal personality from its members. Corporations can be either government-owned or privately owned, and corporations can organize either for-profit or not-for-profit. A privately owned, for-profit corporation is owned by shareholders who elect a board of directors to direct the corporation and hire its managerial staff. A privately owned, for-profit corporation can be either privately held or publicly held.
- **Cooperative:** Often referred to as a "co-op", a cooperative is a limited liability business that can organize for-profit or not-for-profit. A cooperative differs from a for-profit corporation in that it has members, as opposed to shareholders, who share decision-making authority. Cooperatives are typically classified as either consumer cooperatives or worker cooperatives. Cooperatives are fundamental to the ideology of economic democracy.

Classifications

- Agriculture and mining businesses are concerned with the production of raw material, such as plants or minerals.
 - Financial businesses include banks and other companies that generate profit through investment and management of capital.
 - Information businesses generate profits primarily from the resale of intellectual property and include movie studios, publishers and packaged software companies.
 - Manufacturers produce products, from raw materials or component parts, which they then sell at a profit. Companies that make physical goods, such as cars or pipes, are considered manufacturers.
 - Real estate businesses generate profit from the selling, renting, and development of properties comprising land, residential homes, and other kinds of buildings.
 - Retailers and distributors act as middle-men in getting goods produced by manufacturers to the intended consumer, generating a profit as a result of providing sales or distribution services. Most consumer-oriented stores and catalog companies are distributors or retailers.
-

- Service businesses offer intangible goods or services and typically generate a profit by charging for labor or other services provided to government, other businesses, or consumers. Organizations ranging from house decorators to consulting firms, restaurants, and even entertainers are types of service businesses.
- Transportation businesses deliver goods and individuals from location to location, generating a profit on the transportation costs.
- Utilities produce public services such as electricity or sewage treatment, usually under a government charter.

There are many other divisions and subdivisions of businesses. The authoritative list of business types for North America is generally considered to be the North American Industry Classification System, or NAICS. The equivalent European Union list is the Statistical Classification of Economic Activities in the European Community (NACE). Mill,

Management

The efficient and effective operation of a business, and study of this subject, is called management. The major branches of management are financial management, marketing management, human resource management, strategic management, production management, operations management, service management and information technology management.

Owners engage in business administration either directly or indirectly through the employment of managers. Owner managers, or hired managers administer to three component resources that constitute the business' value or worth: financial resources, capital or tangible resources, and human resources. These resources are administered to in at least five functional areas: legal contracting, manufacturing or service production, marketing, accounting, financing, and human resourcing.

Reforming state enterprises

In recent decades, assets and enterprises that were run by various states have been modeled after business enterprises. In 2003, the People's Republic of China reformed 80% of its state-owned enterprises and modeled them on a company-type management system.^[2] Many state institutions and enterprises in China and Russia have been transformed into joint-stock companies, with part of their shares being listed on public stock markets.

Business process management (BPM) is a holistic management approach^[1] focused on aligning all aspects of an organization with the wants and needs of clients. It promotes business effectiveness and efficiency while striving for innovation, flexibility, and integration with technology. BPM attempts to improve processes continuously. It can therefore be described as a "process optimization process." It is argued that BPM enables organizations to be more efficient, more effective and more capable of change than a functionally focused, traditional hierarchical management approach.

Organization and government regulation

Most legal jurisdictions specify the forms of ownership that a business can take, creating a body of commercial law for each type.

The major factors affecting how a business is organized are usually:

- **The size and scope of the business firm** and its structure, management, and ownership, broadly analyzed in the theory of the firm. Generally a smaller business is more flexible, while larger businesses, or those with wider ownership or more formal structures, will usually tend to be organized as corporations or (less often) partnerships. In addition, a business that wishes to raise money on a stock market or to be owned by a wide range of people will often be required to adopt a specific legal form to do so.
- **The sector and country.** Private profit-making businesses are different from government-owned bodies. In some countries, certain businesses are legally obliged to be organized in certain ways.
- Limited Liability Companies (LLC), limited liability partnerships, and other specific types of business organization protect their owners or shareholders from business failure by doing business under a separate legal entity with certain legal protections. In contrast, unincorporated businesses or persons working on their own are usually not so protected.
- **Tax advantages.** Different structures are treated differently in tax law, and may have advantages for this reason.
- **Disclosure and compliance requirements.** Different business structures may be required to make less or more information public (or report it to relevant authorities), and may be bound to comply with different rules and regulations.



The Bank of England in Threadneedle Street, London, England.

Many businesses are operated through a separate entity such as a corporation or a partnership (either formed with or without limited liability). Most legal jurisdictions allow people to organize such an entity by filing certain charter documents with the relevant Secretary of State or equivalent and complying with certain other ongoing obligations. The relationships and legal rights of shareholders, limited partners, or members are governed partly by the charter documents and partly by the law of the jurisdiction where the entity is organized. Generally speaking, shareholders in a corporation, limited partners in a limited partnership, and members in a limited liability company are shielded from personal liability for the debts and obligations of the entity, which is legally treated as a separate "person". This means that unless there is misconduct, the owner's own possessions are strongly protected in law if the business does not succeed.

Where two or more individuals own a business together but have failed to organize a more specialized form of vehicle, they will be treated as a general partnership. The terms of a partnership are partly governed by a partnership agreement if one is created, and partly by the law of the jurisdiction where the partnership is located. No paperwork or filing is necessary to create a partnership, and without an agreement, the relationships and legal rights of the partners will be entirely governed by the law of the jurisdiction where the partnership is located.

A single person who owns and runs a business is commonly known as a *sole proprietor*, whether that person owns it directly or through a formally organized entity.

A few relevant factors to consider in deciding how to operate a business include:

1. General partners in a partnership (other than a limited liability partnership), plus anyone who personally owns and operates a business without creating a separate legal entity, are personally liable for the debts and obligations

of the business.

2. Generally, corporations are required to pay tax just like "real" people. In some tax systems, this can give rise to so-called double taxation, because first the corporation pays tax on the profit, and then when the corporation distributes its profits to its owners, individuals have to include dividends in their income when they complete their personal tax returns, at which point a second layer of income tax is imposed.
3. In most countries, there are laws which treat small corporations differently than large ones. They may be exempt from certain legal filing requirements or labor laws, have simplified procedures in specialized areas, and have simplified, advantageous, or slightly different tax treatment.
4. To "go public" (sometimes called IPO) -- which basically means to allow a part of the business to be owned by a wider range of investors or the public in general—you must organize a separate entity, which is usually required to comply with a tighter set of laws and procedures. Most public entities are corporations that have sold shares, but increasingly there are also public LLCs that sell units (sometimes also called shares), and other more exotic entities as well (for example, REITs in the USA, Unit Trusts in the UK). However, you cannot take a general partnership "public."

Commercial law

Most commercial transactions are governed by a very detailed and well-established body of rules that have evolved over a very long period of time, it being the case that governing trade and commerce was a strong driving force in the creation of law and courts in Western civilization.

As for other laws that regulate or impact businesses, in many countries it is all but impossible to chronicle them all in a single reference source. There are laws governing treatment of labor and generally relations with employees, safety and protection issues (Health and Safety), anti-discrimination laws (age, gender, disabilities, race, and in some jurisdictions, sexual orientation), minimum wage laws, union laws, workers compensation laws, and annual vacation or working hours time.

In some specialized businesses, there may also be licenses required, either due to special laws that govern entry into certain trades, occupations or professions, which may require special education, or by local governments. Professions that require special licenses range from law and medicine to flying airplanes to selling liquor to radio broadcasting to selling investment securities to selling used cars to roofing. Local jurisdictions may also require special licenses and taxes just to operate a business without regard to the type of business involved.

Some businesses are subject to ongoing special regulation. These industries include, for example, public utilities, investment securities, banking, insurance, broadcasting, aviation, and health care providers. Environmental regulations are also very complex and can impact many kinds of businesses in unexpected ways.



Offices in the Los Angeles Downtown Financial District

Capital



Mexican Stock Exchange in Paseo de la Reforma,
Mexico City

When businesses need to raise money (called 'capital'), more laws come into play. A highly complex set of laws and regulations govern the offer and sale of investment securities (the means of raising money) in most Western countries. These regulations can require disclosure of a lot of specific financial and other information about the business and give buyers certain remedies. Because "securities" is a very broad term, most investment transactions will be potentially subject to these laws, unless a special exemption is available.

Capital may be raised through private means, by public offer (IPO) on a stock exchange, or in many other ways. Major stock exchanges include the Shanghai Stock Exchange, Singapore Exchange, Hong Kong Stock Exchange, New York Stock Exchange and Nasdaq (USA), the London Stock Exchange (UK), the Tokyo Stock Exchange (Japan), Bombay Stock Exchange (India) and so on. Most countries with capital markets have at least one.

Businesses that have gone "public" are subject to extremely detailed and complicated regulation about their internal governance (such as how executive officers' compensation is determined) and when and how information is disclosed to the public and their shareholders. In the United States, these regulations are primarily implemented and enforced by the United States Securities and Exchange Commission (SEC). Other Western nations have comparable regulatory bodies. The regulations are implemented and enforced by the China Securities Regulation Commission (CSRC), in China. In Singapore, the regulation authority is Monetary Authority of Singapore (MAS), and in Hong Kong, it is Securities and Futures Commission (SFC).

As noted at the beginning, it is impossible to enumerate all of the types of laws and regulations that impact on business today. In fact, these laws have become so numerous and complex, that no business lawyer can learn them all, forcing increasing specialization among corporate attorneys. It is not unheard of for teams of 5 to 10 attorneys to be required to handle certain kinds of corporate transactions, due to the sprawling nature of modern regulation. Commercial law spans general corporate law, employment and labor law, health-care law, securities law, M&A law (who specialize in acquisitions), tax law, ERISA law (ERISA in the United States governs employee benefit plans), food and drug regulatory law, intellectual property law (specializing in copyrights, patents, trademarks and such), telecommunications law, and more.

Intellectual property

Businesses often have important "intellectual property" that needs protection from competitors for the company to stay profitable. This could require patents, copyrights, trademarks or preservation of trade secrets. Most businesses have names, logos and similar branding techniques that could benefit from trademarking. Patents and copyrights in the United States are largely governed by federal law, while trade secrets and trademarking are mostly a matter of state law. Because of the nature of intellectual property, a business needs protection in every jurisdiction in which they are concerned about competitors. Many countries are signatories to international treaties concerning intellectual property, and thus companies registered in these countries are subject to national laws bound by these treaties. In order to protect trade secrets, companies may require employees to sign non-compete clauses which will impose limitations on an employees interactions with stakeholders, and competitors.

Notes and references

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Mergers and acquisitions

Mergers and acquisitions (abbreviated **M&A**) is an aspect of corporate strategy, corporate finance and management dealing with the buying, selling, dividing and combining of different companies and similar entities that can help an enterprise grow rapidly in its sector or location of origin, or a new field or new location, without creating a subsidiary, other child entity or using a joint venture. The distinction between a "merger" and an "acquisition" has become increasingly blurred in various respects (particularly in terms of the ultimate economic outcome), although it has not completely disappeared in all situations.

Acquisition

An **acquisition** or **takeover** is the purchase of one business or company by another company or other business entity. Such purchase may be of 100%, or nearly 100%, of the assets or ownership equity of the acquired entity. **Consolidation** occurs when two companies combine together to form a new enterprise altogether, and neither of the previous companies survives independently. Acquisitions are divided into "private" and "public" acquisitions, depending on whether the acquiree or merging company (also termed a *target*) is or is not listed on a public stock market. An additional dimension or categorization consists of whether an acquisition is *friendly* or *hostile*.

Achieving acquisition success has proven to be very difficult, while various studies have shown that 50% of acquisitions were unsuccessful.^[1] The acquisition process is very complex, with many dimensions influencing its outcome.^[2]

Whether a purchase is perceived as being a "friendly" one or a "hostile" depends significantly on how the proposed acquisition is communicated to and perceived by the target company's board of directors, employees and shareholders. It is normal for M&A deal communications to take place in a so-called "confidentiality bubble" wherein the flow of information is restricted pursuant to confidentiality agreements.^[3] In the case of a friendly transaction, the companies cooperate in negotiations; in the case of a hostile deal, the board and/or management of the target is unwilling to be bought or the target's board has no prior knowledge of the offer. Hostile acquisitions can, and often do, ultimately become "friendly", as the acquiror secures endorsement of the transaction from the board of the acquiree company. This usually requires an improvement in the terms of the offer and/or through negotiation.

"Acquisition" usually refers to a purchase of a smaller firm by a larger one. Sometimes, however, a smaller firm will acquire management control of a larger and/or longer-established company and retain the name of the latter for the post-acquisition combined entity. This is known as a **reverse takeover**. Another type of acquisition is the **reverse merger**, a form of transaction that enables a private company to be publicly listed in a relatively short time frame. A reverse merger occurs when a privately held company (often one that has strong prospects and is eager to raise financing) buys a publicly listed shell company, usually one with no business and limited assets.^[4]

There are also a variety of structures used in securing control over the assets of a company, which have different tax and regulatory implications:

- The buyer buys the shares, and therefore control, of the target company being purchased. Ownership control of the company in turn conveys effective control over the assets of the company, but since the company is acquired intact as a going concern, this form of transaction carries with it all of the liabilities accrued by that business over its past and all of the risks that company faces in its commercial environment.
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- The buyer buys the assets of the target company. The cash the target receives from the sell-off is paid back to its shareholders by dividend or through liquidation. This type of transaction leaves the target company as an empty shell, if the buyer buys out the entire assets. A buyer often structures the transaction as an asset purchase to "cherry-pick" the assets that it wants and leave out the assets and liabilities that it does not. This can be particularly important where foreseeable liabilities may include future, unquantified damage awards such as those that could arise from litigation over defective products, employee benefits or terminations, or environmental damage. A disadvantage of this structure is the tax that many jurisdictions, particularly outside the United States, impose on transfers of the individual assets, whereas stock transactions can frequently be structured as like-kind exchanges or other arrangements that are tax-free or tax-neutral, both to the buyer and to the seller's shareholders.

The terms "demerger", "spin-off" and "spin-out" are sometimes used to indicate a situation where one company splits into two, generating a second company which may or may not become separately listed on a stock exchange.

As per knowledge-based views, firms can generate greater values through the retention of knowledge-based resources which they generate and integrate. Extracting technological benefits during and after acquisition is ever challenging issue because of organizational differences. Based on the content analysis of seven interviews authors concluded five following components for their grounded model of acquisition:

1. Improper documentation and changing implicit knowledge makes it difficult to share information during acquisition.
2. For acquired firm symbolic and cultural independence which is the base of technology and capabilities are more important than administrative independence.
3. Detailed knowledge exchange and integrations are difficult when the acquired firm is large and high performing.
4. Management of executives from acquired firm is critical in terms of promotions and pay incentives to utilize their talent and value their expertise.
5. Transfer of technologies and capabilities are most difficult task to manage because of complications of acquisition implementation. The risk of losing implicit knowledge is always associated with the fast pace acquisition.

Preservation of tacit knowledge, employees and documentation are often difficult to achieve during and after acquisition. Strategic management of all these resources is a very important factor for a successful acquisition.

An increase in acquisitions in the global business environment requires enterprises to evaluate the key stake holders of acquisition very carefully before implementation. It is imperative for the acquirer to understand this relationship and apply it to its advantage. Retention is only possible when resources are exchanged and managed without affecting their independence.

Distinction between mergers and acquisitions

The terms **merger** and **acquisition** mean slightly different things. The legal concept of a merger (with the resulting corporate mechanics, statutory merger or statutory consolidation, which have nothing to do with the resulting power grab as between the management of the target and the acquirer) is different from the business point of view of a "merger", which can be achieved independently of the corporate mechanics through various means such as "triangular merger", statutory merger, acquisition, etc.

When one company takes over another and clearly establishes itself as the new owner, the purchase is called an "acquisition". From a legal point of view, in an acquisition, the target company still exists as an independent legal entity, which is controlled by the acquirer.

In the pure sense of the term, a merger happens when two firms agree to go forward as a single new company rather than remain separately owned and operated. This kind of action is more precisely referred to as a "merger of equals". The firms are often of about the same size. Both companies' stocks are surrendered and new company stock is issued in its place. For example, in the 1999 merger of Glaxo Wellcome and SmithKline Beecham, both firms ceased to exist when they merged, and a new company, GlaxoSmithKline, was created.

In practice, however, actual mergers of equals don't happen very often. Usually, one company will buy another and, as part of the deal's terms, simply allow the acquired firm to proclaim that the action is a merger of equals, even if it is technically an acquisition. Being bought out often carries negative connotations; therefore, by describing the deal euphemistically as a merger, deal makers and top managers try to make the takeover more palatable. An example of this would be the takeover of Chrysler by Daimler-Benz in 1999 which was widely referred to as a merger at the time.

A purchase deal will also be called a "merger" when both CEOs agree that joining together is in the best interest of both of their companies. But when the deal is unfriendly (that is, when the target company does not want to be purchased) it is always regarded as an "acquisition".

Business valuation

The five most common ways to value a business are

- asset valuation,
- historical earnings valuation,
- future maintainable earnings valuation,
- relative valuation (comparable company & comparable transactions),
- discounted cash flow (DCF) valuation

Professionals who value businesses generally do not use just one of these methods but a *combination* of some of them, as well as possibly others that are not mentioned above, in order to obtain a more accurate value. The information in the balance sheet or income statement is obtained by one of three accounting measures: a Notice to Reader, a Review Engagement or an Audit.

Accurate business valuation is one of the most important aspects of M&A as valuations like these will have a major impact on the price that a business will be sold for. Most often this information is expressed in a Letter of Opinion of Value (LOV) when the business is being valued for interest's sake. There are other, more detailed ways of expressing the value of a business. While these reports generally get more detailed and expensive as the size of a company increases, this is not always the case as there are many complicated industries which require more attention to detail, regardless of size.

As synergy plays a large role in the valuation of acquisitions it is paramount to get the value of synergies right; synergies are different from the "sales price" valuation of the firm, as they will accrue to the buyer. The analysis should, hence be done from the acquiring firm's point of view. Synergy creating investments are started by the choice of the acquirer and therefore they are not obligatory, making them real options in essence. To include this real options aspect into analysis of acquisition targets is one interesting issue that has been studied lately^[5].

Financing M&A

Mergers are generally differentiated from acquisitions partly by the way in which they are financed and partly by the relative size of the companies. Various methods of financing an M&A deal exist:

Cash

Payment by cash. Such transactions are usually termed acquisitions rather than mergers because the shareholders of the target company are removed from the picture and the target comes under the (indirect) control of the bidder's shareholders.

Stock

Payment in the form of the acquiring company's stock, issued to the shareholders of the acquired company at a given ratio proportional to the valuation of the latter.

Financing options

There are some elements to think about when choosing the form of payment. When submitting an offer, the acquiring firm should consider other potential bidders and think strategically. The form of payment might be decisive for the seller. With pure cash deals, there is no doubt on the real value of the bid (without considering an eventual earnout). The contingency of the share payment is indeed removed. Thus, a cash offer preempts competitors better than securities. Taxes are a second element to consider and should be evaluated with the counsel of competent tax and accounting advisers. Third, with a share deal the buyer's capital structure might be affected and the control of the buyer modified. If the issuance of shares is necessary, shareholders of the acquiring company might prevent such capital increase at the general meeting of shareholders. The risk is removed with a cash transaction. Then, the balance sheet of the buyer will be modified and the decision maker should take into account the effects on the reported financial results. For example, in a pure cash deal (financed from the company's current account), liquidity ratios might decrease. On the other hand, in a pure stock for stock transaction (financed from the issuance of new shares), the company might show lower profitability ratios (e.g. ROA). However, economic dilution must prevail towards accounting dilution when making the choice. The form of payment and financing options are tightly linked. If the buyer pays cash, there are three main financing options:

- Cash on hand: it consumes financial slack (excess cash or unused debt capacity) and may decrease debt rating. There are no major transaction costs.
- It consumes financial slack, may decrease debt rating and increase cost of debt. Transaction costs include underwriting or closing costs of 1% to 3% of the face value.
- Issue of stock: it increases financial slack, may improve debt rating and reduce cost of debt. Transaction costs include fees for preparation of a proxy statement, an extraordinary shareholder meeting and registration.

If the buyer pays with stock, the financing possibilities are:

- Issue of stock (same effects and transaction costs as described above).
- Shares in treasury: it increases financial slack (if they don't have to be repurchased on the market), may improve debt rating and reduce cost of debt. Transaction costs include brokerage fees if shares are repurchased in the market otherwise there are no major costs.

In general, stock will create financial flexibility. Transaction costs must also be considered but tend to have a greater impact on the payment decision for larger transactions. Finally, paying cash or with shares is a way to signal value to the other party, e.g.: buyers tend to offer stock when they believe their shares are overvalued and cash when undervalued.^[6]

Specialist M&A advisory firms

Although at present the majority of M&A advice is provided by full-service investment banks, recent years have seen a rise in the prominence of specialist M&A advisers, who only provide M&A advice (and not financing). These companies are sometimes referred to as Transition companies, assisting businesses often referred to as "companies in transition." To perform these services in the US, an advisor must be a licensed broker dealer, and subject to SEC (FINRA) regulation. More information on M&A advisory firms is provided at corporate advisory.

Motives

The dominant rationale used to explain M&A activity is that acquiring firms seek improved financial performance. The following motives are considered to improve financial performance:

- **Economy of scale:** This refers to the fact that the combined company can often reduce its fixed costs by removing duplicate departments or operations, lowering the costs of the company relative to the same revenue stream, thus increasing profit margins.
- **Economy of scope:** This refers to the efficiencies primarily associated with demand-side changes, such as increasing or decreasing the scope of marketing and distribution, of different types of products.
- **Increased revenue or market share:** This assumes that the buyer will be absorbing a major competitor and thus increase its market power (by capturing increased market share) to set prices.
- **Cross-selling:** For example, a bank buying a stock broker could then sell its banking products to the stock broker's customers, while the broker can sign up the bank's customers for brokerage accounts. Or, a manufacturer can acquire and sell complementary products.
- **Synergy:** For example, managerial economies such as the increased opportunity of managerial specialization. Another example are purchasing economies due to increased order size and associated bulk-buying discounts.
- **Taxation:** A profitable company can buy a loss maker to use the target's loss as their advantage by reducing their tax liability. In the United States and many other countries, rules are in place to limit the ability of profitable companies to "shop" for loss making companies, limiting the tax motive of an acquiring company.
- **Geographical or other diversification:** This is designed to smooth the earnings results of a company, which over the long term smoothens the stock price of a company, giving conservative investors more confidence in investing in the company. However, this does not always deliver value to shareholders (see below).
- **Resource transfer:** resources are unevenly distributed across firms (Barney, 1991) and the interaction of target and acquiring firm resources can create value through either overcoming information asymmetry or by combining scarce resources.^[7]
- **Vertical integration:** Vertical integration occurs when an upstream and downstream firm merge (or one acquires the other). There are several reasons for this to occur. One reason is to internalise an externality problem. A common example of such an externality is double marginalization. Double marginalization occurs when both the upstream and downstream firms have monopoly power and each firm reduces output from the competitive level to the monopoly level, creating two deadweight losses. Following a merger, the vertically integrated firm can collect one deadweight loss by setting the downstream firm's output to the competitive level. This increases profits and consumer surplus. A merger that creates a vertically integrated firm can be profitable.^[8]
- **Hiring:** some companies use acquisitions as an alternative to the normal hiring process. This is especially common when the target is a small private company or is in the startup phase. In this case, the acquiring company simply hires the staff of the target private company, thereby acquiring its talent (if that is its main asset and appeal). The target private company simply dissolves and little legal issues are involved.
- **Absorption of similar businesses under single management:** similar portfolio invested by two different mutual funds namely united money market fund and united growth and income fund, caused the management to absorb united money market fund into united growth and income fund.

However, on average and across the most commonly studied variables, acquiring firms' financial performance does not positively change as a function of their acquisition activity.^[9] Therefore, additional motives for merger and acquisition that may not add shareholder value include:

- **Diversification:** While this may hedge a company against a downturn in an individual industry it fails to deliver value, since it is possible for individual shareholders to achieve the same hedge by diversifying their portfolios at a much lower cost than those associated with a merger. (In his book *One Up on Wall Street*, Peter Lynch memorably termed this "diworseification".)

- Manager's hubris: manager's overconfidence about expected synergies from M&A which results in overpayment for the target company.
- Empire-building: Managers have larger companies to manage and hence more power.
- Manager's compensation: In the past, certain executive management teams had their payout based on the total amount of profit of the company, instead of the profit per share, which would give the team a perverse incentive to buy companies to increase the total profit while decreasing the profit per share (which hurts the owners of the company, the shareholders).

Effects on management

Merger & Acquisitions (M&A) term explains the corporate strategy which determines the financial and long term effects of combination of two companies to create synergies or divide the existing company to gain competitive ground for independent units. A study published in the July/August 2008 issue of the Journal of Business Strategy suggests that mergers and acquisitions destroy leadership continuity in target companies' top management teams for at least a decade following a deal. The study found that target companies lose 21 percent of their executives each year for at least 10 years following an acquisition – more than double the turnover experienced in non-merged firms.^[10] If the businesses of the acquired and acquiring companies overlap, then such turnover is to be expected; in other words, there can only be one CEO, CFO, et cetera at a time.

Different Types of M&A

Types of M&A by functional roles in market

The M&A process itself is a multifaceted which depends upon the type of merging companies.

- A horizontal merger is usually between two companies in the same business sector. The example of horizontal merger would be if a health cares system buys another health care system. This means that synergy can obtained through many forms including such as; increased market share, cost savings and exploring new market opportunities.
- A vertical merger represents the buying of supplier of a business. In the same example as above if a health care system buys the ambulance services from their service suppliers is an example of vertical buying. The vertical buying is aimed at reducing overhead cost of operations and economy of scale.
- Conglomerate M&A is the third form of M&A process which deals the merger between two irrelevant companies. The example of conglomerate M&A with relevance to above scenario would be if health care system buys a restaurant chain. The objective may be diversification of capital investment.

Arm's length mergers

An arm's length merger is a merger: 1. approved by disinterested directors and 2. approved by disinterested stockholders:

"The two elements are complementary and not substitutes. The first element is important because the directors have the capability to act as effective and active bargaining agents, which disaggregated stockholders do not. But, because bargaining agents are not always effective or faithful, the second element is critical, because it gives the minority stockholders the opportunity to reject their agents' work. Therefore, when a merger with a controlling stockholder was: 1) negotiated and approved by a special committee of independent directors; and 2) conditioned on an affirmative vote of a majority of the minority stockholders, the business judgment standard of review should presumptively apply, and any plaintiff ought to have to plead particularized facts that, if true, support an inference that, despite the facially fair process, the merger was tainted because of fiduciary wrongdoing."^[11]

Strategic Mergers

A Strategic merger usually refers to long term strategic holding of target (Acquired) firm. This type of M&A process aims at creating synergies in the long run by increased market share, broad customer base, and corporate strength of business. A strategic acquirer may also be willing to pay a premium offer to target firm in the outlook of the synergy value created after M&A process.

M&A research and statistics for acquired organizations

Given that the cost of replacing an executive can run over 100% of his or her annual salary, any investment of time and energy in re-recruitment will likely pay for itself many times over if it helps a business retain just a handful of key players that would have otherwise left.^[12]

Organizations should move rapidly to re-recruit key managers. It's much easier to succeed with a team of quality players that you select deliberately rather than try to win a game with those who randomly show up to play.^[13]

Brand considerations

Mergers and acquisitions often create brand problems, beginning with what to call the company after the transaction and going down into detail about what to do about overlapping and competing product brands. Decisions about what brand equity to write off are not inconsequential. And, given the ability for the right brand choices to drive preference and earn a price premium, the future success of a merger or acquisition depends on making wise brand choices. Brand decision-makers essentially can choose from four different approaches to dealing with naming issues, each with specific pros and cons:^[14]

1. Keep one name and discontinue the other. The strongest legacy brand with the best prospects for the future lives on. In the merger of United Airlines and Continental Airlines, the United brand will continue forward, while Continental is retired.
2. Keep one name and demote the other. The strongest name becomes the company name and the weaker one is demoted to a divisional brand or product brand. An example is Caterpillar Inc. keeping the Bucyrus International name.^[15]
3. Keep both names and use them together. Some companies try to please everyone and keep the value of both brands by using them together. This can create a unwieldy name, as in the case of PricewaterhouseCoopers, which has since changed its brand name to "PwC".
4. Discard both legacy names and adopt a totally new one. The classic example is the merger of Bell Atlantic with GTE, which became Verizon Communications. Not every merger with a new name is successful. By consolidating into YRC Worldwide, the company lost the considerable value of both Yellow Freight and Roadway Corp.

The factors influencing brand decisions in a merger or acquisition transaction can range from political to tactical. Ego can drive choice just as well as rational factors such as brand value and costs involved with changing brands.^[15]

Beyond the bigger issue of what to call the company after the transaction comes the ongoing detailed choices about what divisional, product and service brands to keep. The detailed decisions about the brand portfolio are covered under the topic brand architecture.

History of M&A

The Great Merger Movement: 1895-1905

The Great Merger Movement was a predominantly U.S. business phenomenon that happened from 1895 to 1905. During this time, small firms with little market share consolidated with similar firms to form large, powerful institutions that dominated their markets. It is estimated that more than 1,800 of these firms disappeared into consolidations, many of which acquired substantial shares of the markets in which they operated. The vehicle used were so-called trusts. In 1900 the value of firms acquired in mergers was 20% of GDP. In 1990 the value was only 3% and from 1998–2000 it was around 10–11% of GDP. Companies such as DuPont, US Steel, and General Electric that merged during the Great Merger Movement were able to keep their dominance in their respective sectors through 1929, and in some cases today, due to growing technological advances of their products, patents, and brand recognition by their customers. There were also other companies that held the greatest market share in 1905 but at the same time did not have the competitive advantages of the companies like DuPont and General Electric. These companies such as International Paper and American Chicle saw their market share decrease significantly by 1929 as smaller competitors joined forces with each other and provided much more competition. The companies that merged were mass producers of homogeneous goods that could exploit the efficiencies of large volume production. In addition, many of these mergers were capital-intensive. Due to high fixed costs, when demand fell, these newly-merged companies had an incentive to maintain output and reduce prices. However more often than not mergers were "quick mergers". These "quick mergers" involved mergers of companies with unrelated technology and different management. As a result, the efficiency gains associated with mergers were not present. The new and bigger company would actually face higher costs than competitors because of these technological and managerial differences. Thus, the mergers were not done to see large efficiency gains, they were in fact done because that was the trend at the time. Companies which had specific fine products, like fine writing paper, earned their profits on high margin rather than volume and took no part in Great Merger Movement.

Short-run factors

One of the major short run factors that sparked The Great Merger Movement was the desire to keep prices high. However, high prices attracted the entry of new firms into the industry who sought to take a piece of the total product. With many firms in a market, supply of the product remains high.

A major catalyst behind the Great Merger Movement was the Panic of 1893, which led to a major decline in demand for many homogeneous goods. For producers of homogeneous goods, when demand falls, these producers have more of an incentive to maintain output and cut prices, in order to spread out the high fixed costs these producers faced (i.e. lowering cost per unit) and the desire to exploit efficiencies of maximum volume production. However, during the Panic of 1893, the fall in demand led to a steep fall in prices.

Another economic model proposed by Naomi R. Lamoreaux for explaining the steep price falls is to view the involved firms acting as monopolies in their respective markets. As quasi-monopolists, firms set quantity where marginal cost equals marginal revenue and price where this quantity intersects demand. When the Panic of 1893 hit, demand fell and along with demand, the firm's marginal revenue fell as well. Given high fixed costs, the new price was below average total cost, resulting in a loss. However, also being in a high fixed costs industry, these costs can be spread out through greater production (i.e. Higher quantity produced). To return to the quasi-monopoly model, in order for a firm to earn profit, firms would steal part of another firm's market share by dropping their price slightly and producing to the point where higher quantity and lower price exceeded their average total cost. As other firms joined this practice, prices began falling everywhere and a price war ensued.^[16]

One strategy to keep prices high and to maintain profitability was for producers of the same good to collude with each other and form associations, also known as cartels. These cartels were thus able to raise prices right away, sometimes more than doubling prices. However, these prices set by cartels only provided a short-term solution

because cartel members would cheat on each other by setting a lower price than the price set by the cartel. Also, the high price set by the cartel would encourage new firms to enter the industry and offer competitive pricing, causing prices to fall once again. As a result, these cartels did not succeed in maintaining high prices for a period of no more than a few years. The most viable solution to this problem was for firms to merge, through horizontal integration, with other top firms in the market in order to control a large market share and thus successfully set a higher price.

Long-run factors

In the long run, due to desire to keep costs low, it was advantageous for firms to merge and reduce their transportation costs thus producing and transporting from one location rather than various sites of different companies as in the past. Low transport costs, coupled with economies of scale also increased firm size by two- to fourfold during the second half of the nineteenth century. In addition, technological changes prior to the merger movement within companies increased the efficient size of plants with capital intensive assembly lines allowing for economies of scale. Thus improved technology and transportation were forerunners to the Great Merger Movement. In part due to competitors as mentioned above, and in part due to the government, however, many of these initially successful mergers were eventually dismantled. The U.S. government passed the Sherman Act in 1890, setting rules against price fixing and monopolies. Starting in the 1890s with such cases as Addyston Pipe and Steel Company v. United States, the courts attacked large companies for strategizing with others or within their own companies to maximize profits. Price fixing with competitors created a greater incentive for companies to unite and merge under one name so that they were not competitors anymore and technically not price fixing.

Merger waves

The economic history has been divided into *Merger Waves* based on the merger activities in the business world as:^[17]

Period	Name	Facet
1897–1904	First Wave	Horizontal mergers
1916–1929	Second Wave	Vertical mergers
1965–1969	Third Wave	Diversified conglomerate mergers
1981–1989	Fourth Wave	Congeneric mergers; Hostile takeovers; Corporate Raiding
1992–2000	Fifth Wave	Cross-border mergers
2003–2008	Sixth Wave	Shareholder Activism, Private Equity, LBO

M&A objectives in more recent merger waves

During the third merger wave (1965–1989), corporate marriages involved more diverse companies. Acquirers more frequently bought into different industries. Sometimes this was done to smooth out cyclical bumps, to diversify, the hope being that it would hedge an investment portfolio.

Starting in the fourth merger wave (1992–1998) and continuing today, companies are more likely to acquire in the same business, or close to it, firms that complement and strengthen an acquirer's capacity to serve customers.

Buyers aren't necessarily hungry for the target companies' hard assets. Some are more interested in acquiring thoughts, methodologies, people and relationships. Paul Graham recognized this in his 2005 essay "Hiring is Obsolete", in which he theorizes that the free market is better at identifying talent, and that traditional hiring practices do not follow the principles of free market because they depend a lot upon credentials and university degrees. Graham was probably the first to identify the trend in which large companies such as Google, Yahoo! or Microsoft were choosing to acquire startups instead of hiring new recruits.^[18]

Many companies are being bought for their patents, licenses, market share, name brand, research staffs, methods, customer base, or culture. Soft capital, like this, is very perishable, fragile, and fluid. Integrating it usually takes more finesse and expertise than integrating machinery, real estate, inventory and other tangibles.^[19]

Cross-border M&A

In a study conducted in 2000 by Lehman Brothers, it was found that, on average, large M&A deals cause the domestic currency of the target corporation to appreciate by 1% relative to the acquirer's local currency.

The rise of globalization has exponentially increased the necessity for MAIC Trust accounts and securities clearing services for Like-Kind Exchanges for cross-border M&A. In 1997 alone, there were over 2333 cross-border transactions, worth a total of approximately \$298 billion. Due to the complicated nature of cross-border M&A, the vast majority of cross-border actions have unsuccessful as companies seek to expand their global footprint and become more agile at creating high-performing businesses and cultures across national boundaries.^[20]

Even mergers of companies with headquarters in the same country are can often be considered international in scale and require MAIC custodial services. For example, when Boeing acquired McDonnell Douglas, the two American companies had to integrate operations in dozens of countries around the world (1997). This is just as true for other apparently "single country" mergers, such as the \$29 billion dollar merger of Swiss drug makers Sandoz and Ciba-Geigy (now Novartis).

M&A failure

Despite the goal of performance improvement, results from mergers and acquisitions (M&A) are often disappointing compared with results predicted or expected. Numerous empirical studies show high failure rates of M&A deals. Studies are mostly focused on individual determinants. A book by Thomas Straub (2007) "Reasons for frequent failure in Mergers and Acquisitions"^[21] develops a comprehensive research framework that bridges different perspectives and promotes an understanding of factors underlying M&A performance in business research and scholarship. The study should help managers in the decision making process. The first important step towards this objective is the development of a common frame of reference that spans conflicting theoretical assumptions from different perspectives. On this basis, a comprehensive framework is proposed with which to understand the origins of M&A performance better and address the problem of fragmentation by integrating the most important competing perspectives in respect of studies on M&A Furthermore according to the existing literature relevant determinants of firm performance are derived from each dimension of the model. For the dimension strategic management, the six strategic variables: market similarity, market complementarities, production operation similarity, production operation complementarities, market power, and purchasing power were identified having an important impact on M&A performance. For the dimension organizational behavior, the variables acquisition experience, relative size, and cultural differences were found to be important. Finally, relevant determinants of M&A performance from the financial field were acquisition premium, bidding process, and due diligence. Three different ways in order to best measure post M&A performance are recognized: Synergy realization, absolute performance and finally relative performance.

Employee turnover contributes to M&A failures. The turnover in target companies is double the turnover experienced in non-merged firms for the ten years following the merger.^[22]

Major M&A

1990s

Top 10 M&A deals worldwide by value (in mil. USD) from 1990 to 1999^[23]:

Rank	Year	Purchaser	Purchased	Transaction value (in mil. USD)
1	1999	Vodafone Airtouch PLC ^[24]	Mannesmann	183,000
2	1999	Pfizer ^[25]	Warner-Lambert	90,000
3	1998	Exxon ^{[26][27]}	Mobil	77,200
4	1998	Citicorp	Travelers Group	73,000
5	1999	SBC Communications	Ameritech Corporation	63,000
6	1999	Vodafone Group	AirTouch Communications	60,000
7	1998	Bell Atlantic ^[28]	GTE	53,360
8	1998	BP ^[29]	Amoco	53,000
9	1999	Qwest Communications	US WEST	48,000
10	1997	Worldcom	MCI Communications	42,000

2000s

Top 10 M&A deals worldwide by value (in mil. USD) from 2000 to 2010^[23]:

Rank	Year	Purchaser	Purchased	Transaction value (in mil. USD)
1	2000	<i>Fusion</i> : AOL Inc. (America Online) ^{[30][31]}	Time Warner	164,747
2	2000	Glaxo Wellcome Plc.	SmithKline Beecham Plc.	75,961
3	2004	Royal Dutch Petroleum Company	"Shell" Transport & Trading Co.	74,559
4	2006	AT&T Inc. ^{[32][33]}	BellSouth Corporation	72,671
5	2001	Comcast Corporation	AT&T Broadband	72,041
6	2009	Pfizer Inc.	Wyeth	68,000
7	2000	<i>Spin-off</i> : Nortel Networks Corporation		59,974
8	2002	Pfizer Inc.	Pharmacia Corporation	59,515
9	2004	JPMorgan Chase & Co. ^[34]	Bank One Corporation	58,761
10	2008	InBev Inc.	Anheuser-Busch Companies, Inc.	52,000

M&A in popular culture

In the novel *American Psycho* the protagonist Patrick Bateman, played by Christian Bale in the film adaptation, works in mergers and acquisitions, which he once referred to as "murders and executions" to a potential victim.

In the film *The Thomas Crown Affair*, Thomas Crown is the CEO of a fictional mergers and acquisitions firm, called Crown Acquisitions.

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Talent management

Talent management refers to the anticipation of required human capital the organization needs at the time then setting a plan to meet those needs^[1]. Talent management^[2] in this context does not refer to the management of entertainers. Companies engaging in a talent management strategy shift the responsibility of employees from the human resources department to all managers throughout the organization.^[2] The process of attracting and retaining profitable employees, as it is increasingly more competitive between firms and of strategic importance, has come to be known as "the war for talent." Talent management is also known as HCM (Human Capital Management).

The term "talent management" means different things to different organizations. To some it is about the management of high-worth individuals or "the talented" whilst to others it is about how talent is managed generally - i.e. on the assumption that all people have talent which should be identified and liberated.

History

Talent management is a term that emerged in the 1990s to incorporate developments in Human Resources Management which placed more of an emphasis on the management of human resources or talent. The term was coined by David Watkins of Softscape^[3] published in an article in 1998;^[4] however the connection between human resource development and organizational effectiveness has been established since the 1970s.^[5] Talent management is part of the Evolution of Talent Measurement Technologies^[6].

The issue with many companies today is that their organizations put tremendous effort into attracting employees to their company, but spend little time into retaining and developing talent. A talent management system must be worked into the business strategy and implemented in daily processes throughout the company as a whole. It cannot be left solely to the human resources department to attract and retain employees, but rather must be practiced at all levels of the organization. The business strategy must include responsibilities for line managers to develop the skills of their immediate subordinates. Divisions within the company should be openly sharing information with other departments in order for employees to gain knowledge of the overall organizational objectives.^[7] Companies that focus on developing their talent integrate plans and processes to track and manage their employee talent, including the following:

- Sourcing, attracting, recruiting and onboarding qualified candidates with competitive backgrounds
- Managing and defining competitive salaries
- Training and development opportunities
- Performance management processes
- Retention programs
- Promotion and transitioning^[8]

The talent management strategy may be supported by technology such as HRIS (HR Information Systems) or HRMS (HR Management Systems). Modern techniques also use Competency-based management methodologies to capture and utilize competencies appropriate to strategically drive an organization's long term plans.

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Human Capital Management

Companies that engage in talent management (Human Capital Management) are strategic and deliberate in how they source, attract, select, train, develop, retain, promote, and move employees through the organization. Research done on the value of such systems implemented within companies consistently uncovers benefits in these critical economic areas: revenue, customer satisfaction, quality, productivity, cost, cycle time, and market capitalization.^{[10][11]} The mindset of this more personal human resources approach seeks not only to hire the most qualified and valuable employees but also to put a strong emphasis on retention.

The major aspects of talent management practiced within an organization must consistently include:^[12]

- performance management
- leadership development
- workforce planning/identifying talent gaps
- recruiting

Evaluations

From a talent management standpoint, employee evaluations concern two major areas of measurement: **performance and potential**. Current employee performance within a specific job has always been a standard evaluation measurement tool of the profitability of an employee. However, talent management also seeks to focus on an employee's potential, meaning an employee's future performance, if given the proper development of skills and increased responsibility.

Competencies and Talent Management

This term "talent management" is usually associated with competency-based management. Talent management decisions are often driven by a set of organizational core competencies as well as position-specific competencies. The competency set may include knowledge, skills, experience, and personal traits (demonstrated through defined behaviors). Older competency models might also contain attributes that rarely predict success (e.g. education, tenure, and diversity factors that are illegal to consider in relation to job performance in many countries, and unethical within organizations). New techniques involve creating a Competency architecture for the organization that includes a Competency dictionary to hold the competencies in order to build job descriptions.

Talent marketplace

A talent marketplace is an employee training and development strategy that is set in place within an organization. It is found to be most beneficial for companies where the most productive employees can pick and choose the projects and assignments that are most ideal for the specific employee. An ideal setting is where productivity is employee centric and tasks are described as "judgment-based work," for example, in a law firm. The point of activating a talent marketplace within a department is to harness and link individuals' particular skills (project management or extensive knowledge in a particular field) with the task at hand. Examples of companies that implement the talent marketplace strategy are American Express and IBM.^[13]

Current Application of Talent Management

In current economic conditions, many companies have felt the need to cut expenses. This should be the ideal environment to execute a talent management system as a means of optimizing the performance of each employee and the organization. Selection offers are large return on investments. Job analysis and assessment validation help enhance the predictive power of selection tools. However, within many companies the concept of human capital management has just begun to develop. "In fact, only 5 percent of organizations say they have a clear talent management strategy and operational programs in place today."^[12]

Talent Review

To develop a clear talent management strategy and to increase awareness of available talent and successors, all organizations should conduct regular Talent Review meetings to be prepared for a variety of business changes, such as mergers, company growth, or a decrease in talent needs. In the same way that all companies have regular meetings and reports regarding their financial status and budgetary needs, the Talent Review meeting is designed to review the current talent status and future successor needs in the organization.

The Talent Review meeting is an important part of the overall talent management process; it is designed to review the performance and career potential of employees, to discuss possible vacancy risks of current employees, to identify successors and top talent in the organization, and to create development action plans to prepare employees for future roles in the organization. "This is what talent management is all about — gathering information about talent, analyzing their career interests and organizational business needs, identifying top talent and successes, and developing these individuals to reduce the risk of losing the best people and experiencing extensive leadership gaps when turnover occurs." [14]

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External Links

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Succession planning

Succession planning is a process for identifying and developing internal people with the potential to fill key business leadership positions in the company. Succession planning increases the availability of experienced and capable employees that are prepared to assume these roles as they become available. Taken narrowly, "replacement planning" for key roles is the heart of succession planning. Effective succession or talent-pool management concerns itself with building a series of feeder groups up and down the entire leadership pipeline or progression (Charan, Drotter, Noel, 2001). In contrast, replacement planning is focused narrowly on identifying specific back-up candidates for given senior management positions. For the most part position-driven replacement planning (often referred to as the "truck scenario") is a forecast, which research indicates does not have substantial impact on outcomes.

Fundamental to the succession-management process is an underlying philosophy that argues that top talent in the corporation must be managed for the greater good of the enterprise. Merck and other companies argue that a "talent mindset" must be part of the leadership culture for these practices to be effective.

Research indicates many succession-planning initiatives fall short of their intent (Corporate Leadership Council, 1998). "Bench strength," as it is commonly called, remains a stubborn problem in many if not most companies. Studies indicate that companies that report the greatest gains from succession planning feature high ownership by the CEO and high degrees of engagement among the larger leadership team ^[1]

Companies that are well known for their succession planning and executive talent development practices include: GE, Honeywell, IBM, Marriott, Microsoft, Pepsi and Procter & Gamble.

Research indicates that clear objectives are critical to establishing effective succession planning.^[2] These objectives tend to be core to many or most companies that have well-established practices:

- Identify those with the potential to assume greater responsibility in the organization
- Provide critical development experiences to those that can move into key roles
- Engage the leadership in supporting the development of high-potential leaders
- Build a data base that can be used to make better staffing decisions for key jobs

In other companies these additional objectives may be embedded in the succession process:

- Improve employee commitment and retention
- Meet the career development expectations of existing employees
- Counter the increasing difficulty and costs of recruiting employees externally

Field of succession management

There is a substantial body of literature on the subject of succession planning. The first book that addressed the topic fully was "Executive Continuity" by Walter Mahler. Mahler was responsible in the 1970s for helping to shape the General Electric succession process which became the gold standard of corporate practice. Mahler, who was heavily influenced by Peter Drucker, wrote three other books on the subject of succession, all of which are out of print. His colleagues, Steve Drotter and Greg Kesler, as well as others, expanded on Mahler's work in their writings. "The Leadership Pipeline: How to Build the Leadership Powered Company," by Charan, Drotter and Noel is noteworthy. A new edited collection of materials, edited by Marshall Goldsmith, describes many contemporary examples in large companies.^[3]

Most large corporations assign a process owner for talent and succession management. Resourcing of the work varies widely from numbers of highly dedicated internal consultants to limited professional support embedded in the roles of human resources generalists. Often these staff resources are separate from external staffing or recruiting functions. Some companies today seek to integrate internal and external staffing. Others are more inclined to integrate succession management with the performance management process in order to simplify the work for line

managers.

Large consultancies, such as McKinsey, have recently focused on the broader talent issue, but most consulting support to executive succession and development practices probably comes from numerous boutique firms and retired executives in the field.

The leading professional affiliation for succession-planning professionals who specialize on the HR aspect is, arguably, The Human Resources Planning Society (publishers of People and Strategy Journal at <http://www.hrps.org/>), an international association with academic and practitioner membership from around the world. The organization that approaches succession planning from a comprehensive standpoint, in addition to just HR, would be the International Succession Planning Association (www.ispassociation.org.)

Family business

Arieu proposed a model in order to classify family firms into four scenarios: political, openness, foreign management and natural succession.

POLITICAL SCENARIO: This is the case of a company linked to a large family, where it is expected that through inheritance, the property was spray quickly, possibly faster than the growth of own business, resulting in a dividend per head lower and lower. Identifying suitable members in the family can incorporate to address and possibly distinguish who may occupy the general direction afterwards. However, the existence of many members in the family can turn into conflicts of power, making it necessary to establish agreements and occasionally reorganize the business in terms of those individuals who, because of the obvious professional and human qualities can be recognized as leaders. In many cases this may mean separate reorganization to create new companies and business units.

OPENESS: When members of the next generation are numerous and among them is not possible to identify a person who possesses the characteristics necessary to assume leadership positions with expertise in family business, we have a scenario that we call Open, since the strategy more suitable for this type of organization is to shift some capital to others who can provide not only management skills but also liquidity for family members. This will succeed in securing the future of the business, creating more value for society and retention of jobs for their employees, not to please the family, getting money and avoid future complications.

FOREIGN MANAGEMENT: This scenario occurs when family members who control the business are not many, and yet, not having any of its members with a natural profile of leadership succession when they choose to appoint a non-family CEO .

NATURAL SUCCESSION: Families seeking to preserve its legacy business are the most favorable conditions in the presence of a stage of natural succession. This is the case of a company controlled by a few families, few heirs who in turn have identified among them a worthy successor, a strong name also is associated with the adequacy enough to drive its growth, the ability to run the organization, understanding market and commitment which means only a part of the family patrimony is also a source of value to society, other shareholders, customers, suppliers and even their own employees (stakeholders).this will help in improved succession planning.

Arieu Family Business Succession Model (Spanish) ^[4]

Process and practices

Companies devise elaborate models to characterize their succession and development practices. Most reflect a cyclical series of activities that include these fundamentals:

- Identify key roles for succession or replacement planning
- Define the competencies and motivational profile required to undertake those roles
- Assess people against these criteria - with a future orientation
- Identify pools of talent that could potentially fill and perform highly in key roles
- Develop employees to be ready for advancement into key roles - primarily through the right set of experiences.

In many companies, over the past several years, the emphasis has shifted from planning job assignments to development, with much greater focus on managing key experiences that are critical to growing global business leaders. North American companies tend to be more active in this regard, followed by European and Latin American countries.

PepsiCo, IBM and Nike are current examples of the so-called "game planning" approach to succession and talent management. In these and other companies annual reviews are supplemented with an ongoing series of discussions among senior leaders about who is ready to assume larger roles. Vacancies are anticipated and slates of names are prepared based on highest potential and readiness for job moves. Organization realignments are viewed as critical windows of opportunity to create development moves that will serve the greater good of the enterprise.

Assessment is a key practice in effective succession planning. There is no widely accepted formula for evaluating the future potential of leaders, but there are many tools and approaches that continue to be used today, ranging from personality and cognitive testing to team-based interviewing and simulations and other assessment center methods. Elliott Jaques and others have argued for the importance of focusing assessments narrowly on critical differentiators of future performance. Jaques developed a persuasive case for measuring candidates' ability to manage complexity, formulating a robust operational definition of business intelligence.^[5] The Cognitive Process Profile (CPP) psychometric is an example of a tool used in succession planning to measure candidates' ability to manage complexity according to Jaques' definition.

Companies struggle to find practices that are effective and practical. It is clear leaders who rely on instinct and gut to make promotion decisions are often not effective. Research indicates that the most valid practices for assessment are those that involve multiple methods and especially multiple raters ^[6] "Calibration meetings," composed of senior leaders can be quite effective judging a slate of potential senior leaders with the right tools and facilitation.

With organisations facing increasing complexity and uncertainty in their operating environments some suggest a move away from competence based approaches.^[7] In a future that is increasingly hard to predict leaders will need to see opportunity in volatility, spot patterns in complexity, find creative solutions to problems, keep in mind long term strategic goals for the organisation and wider society, and hold onto uncertainty until the optimum time to make a decision.

Professionals in the field, including academics, consultants and corporate practitioners, have many strongly held views on the topic. Best practice is a slippery concept in this field. There are many thought pieces on the subject that readers may find valuable such as "Debunking 10 Top Talent Management Myths", Talent Management Magazine, Doris Sims, December 2009. Research-based writing is more difficult to find. The Corporate Leadership Council, The Best Practice Institute (BPI) and the Center for Creative Leadership, as well as the Human Resources Planning Society are sources of some effective research-based materials.

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- [5] Jaques, 1989
- [6] McCall, 1998
- [7] Carroll, Levy and Richmond, 2008

Industrial relations

Industrial relations is a multidisciplinary field that studies the employment relationship.^[1] Industrial relations is increasingly being called **employment relations** because of the importance of non-industrial employment relationships. Many outsiders also equate industrial relations to labour relations. Industrial relations studies examine various employment situations, not just ones with a unionized workforce.

Overview

Industrial relations has three faces: science building, problem solving, and ethical.^[2] In the science building phase, industrial relations is part of the social sciences, and it seeks to understand the employment relationship and its institutions through high-quality, rigorous research. In this vein, industrial relations scholarship intersects with scholarship in labor economics, industrial sociology, labor and social history, human resource management, political science, law, and other areas. In the problem solving phase, industrial relations seeks to design policies and institutions to help the employment relationship work better. In the ethical phase, industrial relations contains strong normative principles about workers and the employment relationship, especially the rejection of treating labor as a commodity in favor of seeing workers as human beings in democratic communities entitled to human rights. The term human relations refers to the whole field of relationship that exists because of the necessary collaboration of men and women in the employment process of modern industry. It is that part of management which is concerned with the management of enterprise - whether machine operator, skilled worker, or manager. It deals with either the relationship between the state and employers and workers organisation or the relation between the occupational organisation themselves.

Industrial relations scholarship assumes that labor markets are not perfectly competitive and thus, in contrast to mainstream economic theory, employers typically have greater bargaining power than employees. Industrial relations scholarship also assumes that there are at least some inherent conflicts of interest between employers and employees (for example, higher wages versus higher profits) and thus, in contrast to scholarship in human resource management and organizational behavior, conflict is seen as a natural part of the employment relationship. Industrial relations scholars therefore frequently study the diverse institutional arrangements that characterize and shape the employment relationship—from norms and power structures on the shop floor, to employee voice mechanisms in the workplace, to collective bargaining arrangements at company, regional, or national level, to various levels of public policy and labor law regimes, to "varieties of capitalism" (such as corporatism), social democracy, and neoliberalism).

When labor markets are seen as imperfect, and when the employment relationship includes conflicts of interest, then one cannot rely on markets or managers to always serve workers' interests, and in extreme cases to prevent worker



Protest against industrial relations reform in Melbourne (15 November 2005)

exploitation. Industrial relations scholars and practitioners therefore support institutional interventions to improve the workings of the employment relationship and to protect workers' rights. The nature of these institutional interventions, however, differ between two camps within industrial relations.^[3] The pluralist camp sees the employment relationship as a mixture of shared interests and conflicts of interests that are largely limited to the employment relationship. In the workplace, pluralists therefore champion grievance procedures, employee voice mechanisms such as works councils and labor unions, collective bargaining, and labor-management partnerships. In the policy arena, pluralists advocate for minimum wage laws, occupational health and safety standards, international labor standards, and other employment and labor laws and public policies.^[4] These institutional interventions are all seen as methods for balancing the employment relationship to generate not only economic efficiency, but also employee equity and voice.^[5] In contrast, the Marxist-inspired critical camp sees employer-employee conflicts of interest as sharply antagonistic and deeply embedded in the socio-political-economic system. From this perspective, the pursuit of a balanced employment relationship gives too much weight to employers' interests, and instead deep-seated structural reforms are needed to change the sharply antagonistic employment relationship that is inherent within capitalism. Militant trade unions are thus frequently supported.

History

Industrial relations has its roots in the industrial revolution which created the modern employment relationship by spawning free labor markets and large-scale industrial organizations with thousands of wage workers.^[6] As society wrestled with these massive economic and social changes, labor problems arose. Low wages, long working hours, monotonous and dangerous work, and abusive supervisory practices led to high employee turnover, violent strikes, and the threat of social instability. Intellectually, industrial relations was formed at the end of the 19th century as a middle ground between classical economics and Marxism, with Sidney Webb and Beatrice Webb's *Industrial Democracy* (1897) being the key intellectual work. Industrial relations thus rejected the classical econ.

Institutionally, industrial relations was founded by John R. Commons when he created the first academic industrial relations program at the University of Wisconsin in 1920. Early financial support for the field came from John D. Rockefeller, Jr. who supported progressive labor-management relations in the aftermath of the bloody strike at a Rockefeller-owned coal mine in Colorado. In Britain, another progressive industrialist, Montague Burton, endowed chairs in industrial relations at Leeds, Cardiff and Cambridge in 1930, and the discipline was formalized in the 1950s with the formation of the Oxford School by Allan Flanders and Hugh Clegg.^[7]

Industrial relations was formed with a strong problem-solving orientation that rejected both the classical economists' laissez faire solutions to labor problems and the Marxist solution of class revolution. It is this approach that underlies the New Deal legislation in the United States, such as the National Labor Relations Act and the Fair Labor Standards Act.

Theoretical perspectives

Industrial relations scholars have described three major theoretical perspectives or frameworks, that contrast in their understanding and analysis of workplace relations. The three views are generally known as unitarism, pluralist and radical. Each offers a particular perception of workplace relations and will therefore interpret such events as workplace conflict, the role of unions and job regulation differently. The radical perspective is sometimes referred to as the "conflict model", although this is somewhat ambiguous, as pluralism also tends to see conflict as inherent in workplaces. Radical theories are strongly identified with Marxist theories, although they are not limited to kosala

Pluralist perspective

In Pluralism, the organization is perceived as being made up of powerful and divergent sub-groups, each with its own legitimate loyalties and with their own set of objectives and leaders. In particular, the two predominant sub-groups in the Pluralist perspective are the management and trade unions.

Consequently, the role of management would lean less towards enforcing and controlling and more toward persuasion and co-ordination. Trade unions are deemed as legitimate representatives of employees, conflict is dealt by collective bargaining and is viewed not necessarily as a bad thing and, if managed, could in fact be channeled towards evolution and positive change.

Unitarist perspective

In unitarism, the organization is perceived as an integrated and harmonious whole with the ideal of "one happy family", where management and other members of the staff all share a common purpose, emphasizing mutual cooperation. Furthermore, unitarism has a paternalistic approach where it demands loyalty of all employees, being predominantly managerial in its emphasis and application.

Consequently, trade unions are deemed as unnecessary since the loyalty between employees and organizations are considered mutually exclusive, where there can't be two sides of industry. Conflict is perceived as disruptive and the pathological result of agitators, interpersonal friction and communication breakdown.

Marxist/Radical perspective

This view of industrial relations looks at the nature of the capitalist society, where there is a fundamental division of interest between capital and labour, and sees workplace relations against this background. This perspective sees inequalities of power and economic wealth as having their roots in the nature of the capitalist economic system. Conflict is therefore seen as inevitable and trade unions are a natural response of workers to their exploitation by capital. Whilst there may be periods of acquiescence, the Marxist view would be that institutions of joint regulation would enhance rather than limit management's position as they presume the continuation of capitalism rather than challenge it.

Industrial Relations Today

By many accounts, industrial relations today is in crisis.^[8] In academia, its traditional positions are threatened on one side by the dominance of mainstream economics and organizational behavior, and on the other by postmodernism. In policy-making circles, the industrial relations emphasis on institutional intervention is trumped by a neoliberal emphasis on the laissez faire promotion of free markets. In practice, labor unions are declining and fewer companies have industrial relations functions. The number of academic programs in industrial relations is therefore shrinking, and scholars are leaving the field for other areas, especially human resource management and organizational behavior. The importance of work, however, is stronger than ever, and the lessons of industrial relations remain vital. The challenge for industrial relations is to re-establish these connections with the broader academic, policy, and business worlds.

Notes

- [1] Ackers, Peter (2002) "Reframing Employment Relations: The Case for Neo-Pluralism," *Industrial Relations Journal* . Kaufman, Bruce E. (2004) *The Global Evolution of Industrial Relations: Events, Ideas, and the IIRA* , International Labour Office.
- [2] Kaufman, *The Global Evolution of Industrial Relations*.
- [3] Budd, John W. and Bhawe, Devasheesh (2008) "Values, Ideologies, and Frames of Reference in Industrial Relations," in *Sage Handbook of Industrial Relations*, Sage.
- [4] Befort, Stephen F. and Budd, John W. (2009) *Invisible Hands, Invisible Objectives: Bringing Workplace Law and Public Policy Into Focus*, Stanford University Press.
- [5] Budd, John W. (2004) *Employment with a Human Face: Balancing Efficiency, Equity, and Voice*, Cornell University Press.
- [6] Kaufman, *The Global Evolution of Industrial Relations*.
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Labor relations

Labor relations is the study and practice of managing unionized employment situations. In academia, labor relations is frequently a subarea within industrial relations, though scholars from many disciplines—including economics, sociology, history, law, and political science—also study labor unions and labor movements. In practice, labor relations is frequently a subarea within human resource management. Courses in labor relations typically cover labor history, labor law, union organizing, bargaining, contract administration, and important contemporary topics.^[1]

In the United States, labor relations in the private sector is regulated by the National Labor Relations Act. Public sector labor relations is regulated by the Civil Service Reform Act of 1978 and various pieces of state legislation. In other countries, labor relations might be regulated by law or tradition.

An important professional association for U.S. labor relations scholars and practitioners is the Labor and Employment Relations Association.

Notes

[1] John W. Budd (2010) *Labor Relations: Striking a Balance*, 3rd ed. (Boston: McGraw-Hill/Irwin).

Multiculturalism

Multiculturalism relates to communities containing multiple cultures. The term is used in two broad ways, either descriptively or normatively.^[1] As a descriptive term, it usually refers to the simple fact of cultural diversity: it is generally applied to the demographic make-up of a specific place, sometime at the organizational level, e.g. schools, businesses, neighbourhoods, cities, or nations. As a normative term, it refers to ideologies or policies that promote this diversity or its institutionalisation; in this sense, multiculturalism is a society “at ease with the rich tapestry of human life and the desire amongst people to express their own identity in the manner they see fit.”^[2] Such ideologies or policies vary widely, including country to country,^[3] ranging from the

advocacy of equal respect to the various cultures in a society, to a policy of promoting the maintenance of cultural diversity, to policies in which people of various ethnic and religious groups are addressed by the authorities as defined by the group they belong to.^{[4][5]} However, two main different and seemingly inconsistent strategies have developed through different Government policies and strategies.^{[6][7]} The first focuses on interaction and communication between different cultures. Interactions of cultures provide opportunities for the cultural differences to communicate and interact to create multiculturalism. (Such approaches are also often known as interculturalism.) The second centers on diversity and cultural uniqueness. Cultural isolation can protect the uniqueness of the local



Monument to Multiculturalism by Francesco Perilli in Toronto, Canada. Four identical sculptures are located in Buffalo City, South Africa; Changchun, China; Sarajevo, Bosnia and Sydney, Australia

culture of a nation or area and also contribute to global cultural diversity. A common aspect of many policies following the second approach is that they avoid presenting any specific ethnic, religious, or cultural community values as central.^[8]

Multiculturalism is often contrasted with the concepts of assimilationism and has been described as a "salad bowl" or "cultural mosaic" rather than a "melting pot".^[9]

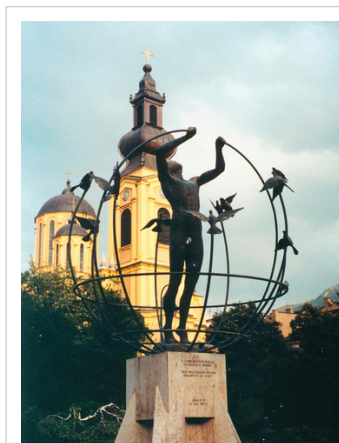
Multiculturalism in different national contexts

The term multiculturalism is most often used in reference to Western nation-states, which had seemingly achieved a de facto single national identity during the 18th and/or 19th centuries.^[10] Multiculturalism has been official policy in several Western nations since the 1970s, for reasons that varied from country to country,^{[11][12][13]} including the fact that many of the great cities of the Western world are increasingly made of a mosaic of cultures.^[14]

The Canadian government has often been described as the instigator of multicultural ideology because of its public emphasis on the social importance of immigration.^[15] The Canadian Royal Commission on Bilingualism and Biculturalism is often referred to as the origins of modern political awareness of multiculturalism.^[16] In the Western English-speaking countries, multiculturalism as an official national policy started in Canada in 1971, followed by Australia, where it has since been displaced by assimilation, in 1973.^[17] It was quickly adopted as official policy by most member-states of the European Union.

Recently, right-of-center governments in several European states—notably the Netherlands and Denmark— have reversed the national policy and returned to an official monoculturalism.^[17] A similar reversal is the subject of debate in the United Kingdom, among others, due to evidence of incipient segregation and anxieties over "home-grown" terrorism.^[18] Several heads-of-state have expressed doubts about the success of multicultural policies: The United Kingdom's Prime Minister David Cameron, German Chancellor Angela Merkel, Australia's ex-prime minister John Howard, Spanish ex-president Jose Maria Aznar and French President Nicolas Sarkozy have voiced concerns about the effectiveness of their multicultural policies for integrating immigrants.^{[19][20]}

Many nation-states in Africa, Asia, and the Americas are culturally diverse, and are 'multicultural' in a descriptive sense. In some, communalism is a major political issue. The policies adopted by these states often have parallels with multiculturalist policies in the Western world, but the historical background is different, and the goal may be a mono-cultural or mono-ethnic nation-building - for instance in the Malaysian government's attempt to create a 'Malaysian race' by 2020.^[21]



*Monument to Multiculturalism by
Francesco Perilli in Sarajevo.*

Australia

The next country to adopt an official policy of multiculturalism after Canada was Australia, a country with similar immigration situations and similar policies, for example the formation of the Special Broadcasting Service.^[22] The White Australia Policy was quietly dismantled after World War II by various changes to immigration policy, the full political introduction of official policies of multiculturalism was not until 1972.^[23] The election of John Howard's Liberal-National Coalition government in 1996 was a major watershed for Australian multiculturalism. Howard had long been a critic of multiculturalism, releasing his One Australia policy in the late 1980s.^[24] A Practical Reference to Religious Diversity for Operational Police and Emergency Services was a publication of the Australasian Police Multicultural Advisory Bureau designed to offer guidance to police and emergency services personnel on how religious affiliation can affect their contact with the public. The first edition was published in 1999.^{[25][26][27]} The first edition covered Buddhist, Hindu, Islamic, Jewish and Sikh faiths with participation of representatives of the various religions.^[28] The second edition added Christian, Australian Aboriginal and Torres Strait Islander religions and the Bahá'í Faith to the list of religions was published in 2002.^[29]



Argentina

Though not called *Multiculturalism* as such, the preamble of Argentina's constitution explicitly promotes immigration, and recognizes the individual's multiple citizenship from other countries. Though 97% of Argentina's population self-identify as of European descent^{[30][31]} to this day a high level of multiculturalism remains a feature of Argentina's culture,^[32] allowing foreign festivals and holidays (e.g. Saint Patrick's Day), supporting all kinds of art or cultural expression from ethnic groups, as well as their diffusion through an important multicultural presence in the media; for instance it is not uncommon to find newspapers^[33] or radio programs in English, German, Italian or French in Argentina.

should never be split into a number of unsocial, jealous, and alien sovereignties."^[46]

As a philosophy, multiculturalism began as part of the pragmatism movement at the end of the nineteenth century in Europe and the United States, then as political and cultural pluralism at the turn of the twentieth.^[47] It was partly in response to a new wave of European imperialism in sub-Saharan Africa and the massive immigration of Southern and Eastern Europeans to the United States and Latin America. Philosophers, psychologists and historians and early sociologists such as Charles Sanders Peirce, William James, George Santayana, Horace Kallen, John Dewey, W. E. B. Du Bois and Alain Locke developed concepts of cultural pluralism, from which emerged what we understand today as multiculturalism. In *Pluralistic Universe* (1909), William James espoused the idea of a "plural society." James saw pluralism as "crucial to the formation of philosophical and social humanism to help build a better, more egalitarian society."^[48]

The educational approach to multiculturalism has since spread to the grade school system, as school systems try to rework their curricula to introduce students to diversity earlier—often on the grounds that it is important for minority students to see themselves represented in the classroom.^{[49][50]} Studies estimated 46.3 million Americans ages 14 to 24 to be the most diverse generation in American society.^[51] In 2009 and 2010, controversy erupted in Texas as the state's curriculum committee made several changes to the state's requirements, often at the expense of minorities. They chose to juxtapose Abraham Lincoln's inaugural address with that of Confederate president Jefferson Davis;^[52] they debated removing Supreme Court Justice Thurgood Marshall and labor-leader César Chávez^[53] and rejected calls to include more Hispanic figures, in spite of the high Hispanic population in the state.^[54]

United Kingdom

Modest multicultural policies^[55] were adopted by local administrations from the 1970s and 1980s onwards, initially during the Labour government of Harold Wilson.^[56] In 1997 the New Labour government committed to a multiculturalist approach at a national level, but after 2001 there was something of a backlash, led by centre-left commentators such as David Goodhart and Trevor Phillips. The government then embraced a policy of community cohesion instead. In 2011 Prime Minister and Conservative Party leader David Cameron said in a speech that "state multiculturalism has failed".^[57]

Continental Europe

Historically, Europe has always been a mixture of Latin, Slavic, Germanic, Uralic, Celtic, Hellenic, Illyrian, Thracian and other cultures influenced by the importation of Hebraic, Christian, Muslim and other belief systems; although the continent was supposedly unified by the super-position of Imperial Roman Christianity, it is accepted that geographic and cultural differences continued from antiquity into the modern age.^[59]

In the 19th century, the ideology of nationalism transformed the way Europeans thought about the state.^[59] Existing states were broken up and new ones created; the new nation-states were founded on the principle that each nation is entitled to its own sovereignty and to engender, protect, and preserve its own unique culture and history. Unity, under this ideology, is seen as an essential feature of the nation and the nation-state—unity of descent, unity of culture, unity of language, and often unity of religion. The nation-state constitutes a culturally homogeneous society, although some national movements recognized regional differences.



Ethno-linguistic map of Austria-Hungary, 1910. Ethnic nationalism became the paramount issue as Italians, Slavs and Hungarians resisted rule by the German-dominated Habsburg state.

Where cultural unity was insufficient, it was encouraged and enforced by the state.^[60] The 19th-century nation-states developed an array of policies—the most important was compulsory primary education in the national language.^[60] The language itself was often standardized by a linguistic academy, and regional languages were ignored or suppressed. Some nation-states pursued violent policies of cultural assimilation and even ethnic cleansing.^[60]

Some European Union countries have introduced policies for "social cohesion", "integration", and (sometimes) "assimilation". The policies include:

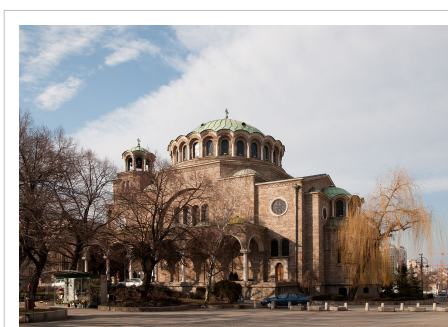
- compulsory courses and/or tests on national history, on the constitution and the legal system (e.g., the computer-based test for individuals seeking naturalization in the UK named Life in the United Kingdom test)
- introduction of an official national history, such as the national canon defined for the Netherlands by the van Oostrom Commission,^[61] and promotion of that history (e.g., by exhibitions about national heroes)
- tests designed to elicit "unacceptable" values. In Baden-Württemberg immigrants are asked what they would do if their son says he is a homosexual. (The desired answer is that they would accept it).^[62]
- prohibitions on Islamic dress — especially the niqab (often misnamed as burqa).^[63]

Other countries have instituted policies which encourage cultural separation. The concept of "Cultural exception" proposed by France in the General Agreement on Tariffs and Trade (GATT) negotiations in 1993 was an example of a measure aimed at protecting local cultures.^[64]



Bulgaria

During its thousand years of history Bulgaria has hosted many religions, ethnic groups and nations. The capital Sofia is the only European city that has peacefully functioning, within less than 100 meters,^{[65][66]} four Place of worship of the major religions: 1) Eastern Orthodox - St Nedelya Church, 2) Islam - Banya Bashi Mosque, 3) Roman Catholicism - Cathedral of St Joseph, Sofia and 4) Orthodox Judaism - Sofia Synagogue, the third largest synagogue in Europe.



St Nedelya Church in Sofia

This unique arrangement has been called by historians a "multicultural cliché".^[67] It has also become known as "The Triangle of Religious Tolerance"^[68] and has initiated the construction of a 100 square meters scale model of the site that is to become a symbol of the capital.^{[69][70][71]}

Furthermore unlike some other Nazi Germany allies or German-occupied countries excluding Denmark, Bulgaria managed to save its entire 48,000-strong Jewish population during World War II from deportation to concentration camps.^{[72] [73]} According to Dr. Marinova-Christidi the main reason for the efforts of Bulgarian people

to save the Bulgarian Jews during WWII is Bulgaria's history of "co-existed for centuries with other religions" - giving it a unique multi-cultural and multi-ethnic history.^[74]

Consequently, Bulgaria has become a Balkan region's example of multiculturalism - not only in religious but also in artistic terms^[75] and ethnic means^{[76][77]}. Its largest ethnic minorities, Turks and Roma, enjoy wide political representation. In 1984 an underground organization called «National Liberation Movement of the Turks in Bulgaria» was formed in Bulgaria which headed the Turkish community's opposition movement. On January 4, 1990 the activists of the movement registered an organization with the legal name «Movement for Rights and Freedom» (MRF) (in Bulgarian: Движение за права и свободи; in Turkish: Hak ve Özgürlükler Hareketi) in the Bulgarian city of Varna. At the moment of registration it had 33 members, at present, according to the organization's website, 68

thousand members plus 24 thousand in the organization's youth wing [78]. In 2012 Bulgarian Turks are represented at every level of government - local, with MRF having mayors in 35 municipalities, at parliamentary level with MRF having 38 deputies (14% of the votes in Parliamentary elections for 2009-13)^[79] and at executive level, where there is currently one Turkish minister - Vezhdi Rashidov. Twenty one Roma political organizations were founded between 1997 and 2003 in Bulgaria.^[80]

Netherlands

Multiculturalism in the Netherlands began with a major increases in immigration during the mid 1950s and 1960s.^[81] As a consequence, an official national policy of multiculturalism was adopted in the early 1980s.^[81] This policy subsequently gave way to more assimilationist policies in the 1990s.^[81] Following the murders of Pim Fortuyn (in 2002) and Theo van Gogh (in 2004) the political debate on the role of multiculturalism in the Netherlands reached new heights.^[82]

Lord Sacks, Chief Rabbi of the United Hebrew Congregations of the Commonwealth, distinguishes between tolerance and multiculturalism, and says that the Netherlands is a tolerant, rather than multicultural, society.^[83] The right-wing cabinet recently said the Netherlands is going to take distance of Multicultural ideas about a multicultural society. "Dutch culture, norms and values must be dominant" Minister Donner said.^[84]

Germany

In October 2010, Angela Merkel told a meeting of younger members of her conservative Christian Democratic Union (CDU) party at Potsdam, near Berlin, that attempts to build a multicultural society in Germany had "utterly failed",^[85] stating: "The concept that we are now living side by side and are happy about it does not work".^{[85][86]} She continued to say that immigrants should integrate and adopt Germany's culture and values. This has added to a growing debate within Germany^[87] on the levels of immigration, its effect on Germany and the degree to which Muslim immigrants have integrated into German society.^[88]

Philippines

The Philippines is the 8th most multiethnic nation in the world.^[89] It has 10 distinct major indigenous ethnic groups mainly the Bicolano, Ibanag, Ilocano, Ivatan, Kapampangan, Moro, Pangasinense, Sambal, Tagalog and Visayan. The Philippines also has several aboriginal races such as the Badjao, Igorot, Lumad, Mangyan and Negritos. The country also has considerable communities of American, Arabic, Chinese, Indian, and Hispanic descent, and other ethnicities from other countries. The Philippine government has various programs supporting and preserving the nation's ethnic diversity.^[90]

India

India is culturally, linguistically, ethnically and religiously the most diverse country in the world. As per the 1961 Census of India, the country is home to 1652 mother tongues.^[91] The culture of India has been shaped by its long history, unique geography and diverse demography. India's languages, religions, dance, music, architecture and customs differ from place to place within the country, but nevertheless possess a commonality. The culture of India is an amalgamation of these diverse sub-cultures spread all over the Indian subcontinent and traditions that are several millennia old.^[92] The Indian caste system describes the social stratification and social restrictions in the Indian subcontinent, in which social classes are defined by thousands of endogamous hereditary groups, often termed as *jātis* or castes.^[93]

The term *multiculturalism* is not much used in India. Within Indian culture, the term *diversity* is more commonly used.

Religiously, the Hindus form the majority, followed by the Muslims. The statistics are: Hindu (80.5%), Muslim (13.4%), Christian (2.3%), Sikh (2.1%), Buddhist, Bahá'í, Jain, Jew and Parsi populations.^[94] Linguistically, the two main language families in India are Indo-Aryan (a branch of Indo-European) and Dravidian. India officially follows a three-language policy. Hindi (spoken in the form of Hindi-Urdu) is the federal official language, English has the federal status of associate/subsidiary official language and each state has its own state official language (in the Hindi *sprachraum*, this reduces to bilingualism). The Republic of India's state boundaries are largely drawn based on linguistic groups; this decision led to the preservation and continuation of local ethno-linguistic sub-cultures, except for the Hindi *sprachraum* which is itself divided into many states. Thus, most states differ from one another in language, culture, cuisine, clothing, literary style, architecture, music and festivities. See Culture of India for more information.

Occasionally, however, India has encountered religiously motivated violence,^[95] such as the Moplah Riots, the Bombay riots, the 1984 anti-Sikh riots and 2002 Gujarat riots.

Indonesia

There are more than 700 living languages spoken in Indonesia^[96] and although predominantly Muslim the country also has large Christian and Hindu populations. Indonesia's national motto, "Bhinneka tunggal ika" ("Unity in Diversity" lit. "many, yet one"), articulates the diversity that shapes the country. Due to migration within Indonesia (as part of government transmigration programs or otherwise), there are significant populations of ethnic groups who reside outside of their traditional regions. Soon after the fourth Indonesian President, Abdurrahman Wahid came into power in 1999, he quickly abolished some of the discriminatory laws in efforts to improve race relationships.



An anti-discrimination poster in a Hong Kong subway station, c. 2005

Japan

Japanese society, with its ideology of homogeneity, has traditionally rejected any need to recognize ethnic differences in Japan, even as such claims have been rejected by such ethnic minorities as the Ainu and Ryukyuan people.^[97] Japanese Minister Taro Aso has called Japan a “one race” nation.^[98] However, there are “International Society” NPOs funded by local governments throughout Japan.^[99]

Malaysia

Malaysia is a multiethnic country, with Malays making up the majority, close to 52% of the population. About 24.6% of the population are Malaysians of Chinese descent. Malaysians of Indian descent comprise about 7% of the population. The remaining 10% comprises:

- Native East Malaysians, namely Bajau, Bidayuh, Dusun, Iban, Kadazan, Melanau, Orang Ulu, Sarawakian Malays, etc.
- Other native tribes of Peninsular Malaysia, such as the Orang Asli and Siamese people, and
- Non-native tribes of Peninsular Malaysia such as the Chettians, the Peranakan and the Portuguese.

The Malaysian New Economic Policy or NEP serves as a form of affirmative action (see Bumiputera).^[100] It promotes structural changes in various aspects of life from education to economic to social integration. Established after the May 13 racial riots of 1969, it sought to address the significant imbalance in the economic sphere where the minority Chinese population had substantial control over commercial activity in the country.

The Malay Peninsula has a long history of international trade contacts, influencing its ethnic and religious composition. Predominantly Malays before the 18th century, the ethnic composition changed dramatically when the British introduced new industries, and imported Chinese and Indian labor. Several regions in the then British Malaya such as Penang, Malacca and Singapore became Chinese dominated. Co-existence between the three ethnicities (and other minor groups) was largely peaceful, despite the fact the immigration affected the demographic and cultural position of the Malays.

Preceding independence of the Federation of Malaya, a social contract was negotiated as the basis of a new society. The contract as reflected in the 1957 Malayan Constitution and the 1963 Malaysian Constitution states that the immigrant groups are granted citizenship, and Malays' special rights are guaranteed. This is often referred to the Bumiputera policy.

These pluralist policies have come under pressure from racist Malay parties, who oppose perceived subversion of Malay rights. The issue is sometimes related to the controversial status of religious freedom in Malaysia.

Mauritius

Multiculturalism has been a characteristic feature of the island of Mauritius.^[101] Mauritian society includes people from many different ethnic and religious groups: Hindu, Muslim and Sikh Indo-Mauritians, Mauritian Creoles (of African and Malagasy descent), Buddhist and Roman Catholic Sino-Mauritians and Franco-Mauritians (descendants of the original French colonists).^[102]

Singapore

Besides English, Singapore recognizes three other languages, namely, Mandarin Chinese, Tamil and Malay as its official languages, with Malay being the national language. Besides being a multilingual country, Singapore also acknowledges festivals celebrated by these three ethnic communities.

During the British colonial rule, there are areas which are enclaves containing a large population of certain ethnic groups exist in areas such as Chinatown, Geylang and Little India in Singapore. Presently⁽²⁰¹⁰⁾, remnants of the colonial ethnic concentration still exists but housing in Singapore is governed by the Ethnic Integration Policy.^[103] The current Indian/Others ethnic limits are 10% and 13%, the limits for Malays are 22% and 25%, the limits for

Chinese are 84% and 87% for the maximum ethnic limits for a neighborhood and a block respectively.

South Korea

South Korea is among the world's most ethnically homogeneous nations.^[104] Those who do not share such features are often rejected by the Korean society or face discrimination.^[105]

However, the word "multiculturalism" is increasingly heard in South Korea. In 2007, Han Geon-Soo, Professor of Cultural Anthropology at Kangwon National University, published an article entitled "Multicultural Korea: Celebration or Challenge of Multiethnic Shift in Contemporary Korea?", noting: "As the increase of foreign migrants in Korea transforms a single-ethnic homogenous Korean society into multiethnic and multicultural one, Korean government and the civil society pay close attention to multiculturalism as an alternative value to their policy and social movement." He argued, however, that "the current discourses and concerns on multiculturalism in Korea" lacked "the constructive and analytical concepts for transforming a society".^[106]

The same year, Stephen Castles of the International Migration Institute argued:

"Korea no longer has to decide whether it wants to become a multicultural society. It made that decision years ago – perhaps unconsciously – when it decided to be a full participant in the emerging global economy. It confirmed that decision when it decided to actively recruit foreign migrants to meet the economic and demographic needs of a fast-growing society. Korea is faced by a different decision today: what type of multicultural society does it want to be?"^[107]

The *Korea Times* suggested in 2009 that South Korea was likely to become a multicultural society.^[108] In 2010, *JoongAng Daily* reported: "Media in Korea is abuzz with the new era of multiculturalism. With more than one million foreigners in Korea, 2 percent of the population comes from other cultures." It added:

"If you stay too long, Koreans become uncomfortable with you. [...] Having a 2 percent foreign population unquestionably causes ripples, but having one million temporary foreign residents does not make Korea a multicultural society. [...] In many ways, this homogeneity is one of Korea's greatest strengths. Shared values create harmony. Sacrifice for the nation is a given. Difficult and painful political and economic initiatives are endured without discussion or debate. It is easy to anticipate the needs and behavior of others. It is the cornerstone that has helped Korea survive adversity. But there is a downside, too. [...] Koreans are immersed in their culture and are thus blind to its characteristics and quirks. Examples of group think are everywhere. Because Koreans share values and views, they support decisions even when they are obviously bad. Multiculturalism will introduce contrasting views and challenge existing assumptions. While it will undermine the homogeneity, it will enrich Koreans with a better understanding of themselves."^[109]

Although many debates still take place in discussing whether Korea really is a multicultural society or not, it is a mutual agreement that Korea has probably entered a stage of multiculturalism and has moved away from its homogenous identity. It is a notified fact that around 35~40% of Korean man in the rural area outside Seoul are engaged with wives from different countries. According to the Dongponews, an online media that connects migrants and immigrants of Korea, the number of foreigners residing in Korea have reached 1.43 million by 2012, and is likely to increase more and more, reaching to the scale that cannot be undermined. More than that, Korea is going through a serious stage of low birthrate, leading to an aging society in shortage of labor forces. Another big changing factor is that Korea already has multi-ethnic, multi-cultural families appearing in great numbers, as one in every ten marriage is between a Korean and a foreigner, and in the rural side this portion is greater.^[110] As such change takes place in such short period of time, it can be understood that many conflicts arise among different groups of people; the immigrants, government, and the rest of the members in Korean society. Recently a lot of media attention is given to these people; documentaries on the lives of wives and their children are often shown, as well as talk shows that portrays struggles and conflicts these people go through such as *Love in Asia*; a talk show hosting foreign wives, sharing their experience of marriage and family life, broadcasted by the national broadcasting channel, KBS. Although whether these channels of media provide the right source of direction to the public is debatable, it is

factually true that many Koreans nowadays do recognize the change that the society is going through due to these media attention. Government policies have also changed very recently; a lot of welfare programs and extracurricular activities are launched under the name of "multicultural policy." The policy is quite recent phenomenon and therefore its effects and counter effects need to be assessed in many different ways. Further studies and development in this area is obviously required, as this is a very rapid social change to Koreans and their society.

Support for multiculturalism

Multiculturalism is seen by its supporters as a fairer system that allows people to truly express who they are within a society, that is more tolerant and that adapts better to social issues.^[111] They argue that culture is not one definable thing based on one race or religion, but rather the result of multiple factors that change as the world changes.

Historically, support for modern multiculturalism stems from the changes in Western societies after World War II, in what Susanne Wessendorf calls the "human rights revolution", in which the horrors of institutionalized racism and ethnic cleansing became almost impossible to ignore in the wake of the Holocaust; with the collapse of the European colonial system, as colonized nations in Africa and Asia successfully fought for their independence and pointed out the racist underpinnings of the colonial system; and, in the United States in particular, with the rise of the Civil Rights Movement, which criticized ideals of assimilation that often led to prejudices against those who did not act according to Anglo-American standards and which led to the development of academic ethnic studies programs as a way to counteract the neglect of contributions by racial minorities in classrooms.^{[112][113]} As this history shows, multiculturalism in Western countries was seen as a useful set of strategies to combat racism, to protect minority communities of all types, and to undo policies that had prevented minorities from having full access to the opportunities for freedom and equality promised by the liberalism that has been the hallmark of Western societies since the Age of Enlightenment.

C. James Trotman argues that multiculturalism is valuable because it "uses several disciplines to highlight neglected aspects of our social history, particularly the histories of women and minorities [...and] promotes respect for the dignity of the lives and voices of the forgotten."^[114] By closing gaps, by raising consciousness about the past, multiculturalism tries to restore a sense of wholeness in a postmodern era that fragments human life and thought."^[114]

Tariq Modood argues that in the early years of the 21st Century, multiculturalism "is most timely and necessary, and [...] we need more not less", since it is "the form of integration" that (1) best fits the ideal of egalitarianism, (2) has "the best chance of succeeding" in the "post-9/11, post 7/7" world, and (3) has remained "moderate [and] pragmatic".^[115]

Bhikhu Parekh counters what he sees as the tendencies to equate multiculturalism with racial minorities "demanding special rights" and to see it as promoting a "thinly veiled racis[m]". Instead, he argues that multiculturalism is in fact "not about minorities" but "is about the proper terms of relationship between different cultural communities", which means that the standards by which the communities resolve their differences, e.g., "the principles of justice" must not come from only one of the cultures but must come "through an open and equal dialogue between them."^[116]



Teenagers of various backgrounds in Oslo, Norway.

Opposition to multiculturalism

Critics of multiculturalism often debate whether the multicultural ideal of benignly co-existing cultures that interrelate and influence one another, and yet remain distinct, is sustainable, paradoxical, or even desirable.^{[117][118][119]} It is argued that Nation states, who would previously have been synonymous with a distinctive cultural identity of their own, lose out to enforced multiculturalism and that this ultimately erodes the host nations' distinct culture.^[120]

Harvard professor of political science Robert D. Putnam conducted a nearly decade long study how multiculturalism affects social trust.^[121] He surveyed 26,200 people in 40 American communities, finding that when the data were adjusted for class, income and other factors, the more racially diverse a community is, the greater the loss of trust. People in diverse communities "don't trust the local mayor, they don't trust the local paper, they don't trust other people and they don't trust institutions," writes Putnam.^[122] In the presence of such ethnic diversity, Putnam maintains that

[W]e hunker down. We act like turtles. The effect of diversity is worse than had been imagined. And it's not just that we don't trust people who are not like us. In diverse communities, we don't trust people who do look like us.^[121]

Ethologist Frank Salter writes:

Relatively homogeneous societies invest more in public goods, indicating a higher level of public altruism. For example, the degree of ethnic homogeneity correlates with the government's share of gross domestic product as well as the average wealth of citizens. Case studies of the United States, Africa and South-East Asia find that multi-ethnic societies are less charitable and less able to cooperate to develop public infrastructure. Moscow beggars receive more gifts from fellow ethnics than from other ethnics [*sic*]. A recent multi-city study of municipal spending on public goods in the United States found that ethnically or racially diverse cities spend a smaller portion of their budgets and less per capita on public services than do the more homogenous cities.^[123]

Dick Lamm, former three-term Democratic governor of the US state of Colorado, wrote in his essay "I have a plan to destroy America":

"Diverse peoples worldwide are mostly engaged in hating each other - that is, when they are not killing each other. A diverse, peaceful, or stable society is against most historical precedent."^[124]

In Aotearoa (New Zealand), which is officially bi-cultural, multiculturalism has been seen as a threat to Maori, and possibly an attempt by Pakeha (whites) to water down the growing strength of Maori demands for self determination. <http://alt.sagepub.com/content/33/1/29.abstract>

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External links

- Multiculturalism (<http://plato.stanford.edu/entries/multiculturalism/>) - Stanford Encyclopedia of Philosophy
- Multiculturalism in Canada debated (http://archives.cbc.ca/politics/language_culture/clips/15251/) - CBC video archives (Sept. 14, 2004 - 42:35 min)
- Canadian Multiculturalism Act (<http://laws.justice.gc.ca/eng/acts/c-18.7/FullText.html>)

Inclusion (value and practice)

This article for the general inclusion concepts in organizational environments. For the use of the term in the sphere of disabilities see Inclusion (disability rights).

Inclusion is an organizational practice and goal stemming from the sociological notion of **inclusiveness** which is the political action and personal effort but at the same time the presence of inclusion practices in which different groups or individuals having different backgrounds like origin, age, race and ethnicity, religion, gender, sexual orientation and identity and other are culturally and socially accepted and welcomed, equally treated, etc.

Miller and Katz (2002) presents a common definition of an **inclusive value system** where they say, "Inclusion is a sense of belonging: feeling respected, valued for who you are; feeling a level of supportive energy and commitment from others so than you can do your best work."^[1] Inclusion is a shift in organization culture. The process of inclusion engages each individual and makes people feeling valued essential to the success of the organization. Individuals function at full capacity, feel more valued, and included in the organization's mission. This culture shift creates higher performing organizations where motivation and morale soar.

Gasorek (1998) notes her success of instituting diversity and inclusion initiatives at Dun & Bradstreet, a credit-reporting firm.^[2] Hyter and Turnock (2006) offer several case studies of engaging inclusion with corporate organizations such as BellSouth, Frito-Lay, Home Depot, and Procter & Gamble.^[3]

Roberson (2006) notes that the term inclusion is often coupled with the term diversity and these terms are often used interchangeably, however they are distinctly different.^[4] The Institute for Inclusion, a nonprofit organization, has collectively attempted to define inclusion apart from diversity. It has developed a set of core values and general principles and conceives of inclusion as requiring a paradigm shift in human consciousness, awareness, and interaction.

Interactional participation skills are not currently standardized in formal evaluations of communicative competence, and there will probably be much controversy surrounding any proposals to standardize the testing of interactional competence. Nonetheless, we need some set of **inclusion guidelines** to decide what skills to look for and how to document them. (page 116, Sawzin, 1984)

This study focused on the aspects of Jennie that can be appreciated. "Positive analysis" is a strategy which has much utility in many contexts, but is very much needed in the lives of children and adults with developmental difficulties. There are many opportunities for parents, professionals and neighbors to minimize their fears, and to move from expectations of deviance to acceptances of difference. (page 122, Sawzin, 1984)

Also see for paradigms out of phase, Martin Sawzin, 1981, Paradigmatic Aphasia and An Antidote: Developmentalism

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Links

- Everyone is Included (<http://www.everyoneisincluded.us>)

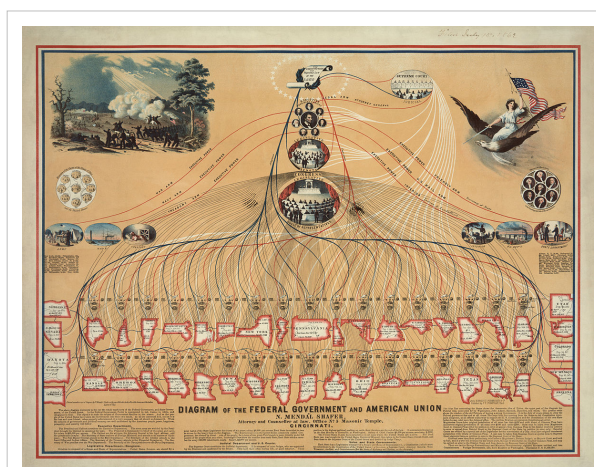
Organization

An **organization** (or **organisation** — see spelling differences) is a social group which distributes tasks for a collective goal. It is the collection of organs of scientific methods and artifacts of the al mamater The word is derived from the Greek word *organon*, itself derived from the better-known word *ergon* which means "organ" - a compartment for a particular task.

There are a variety of legal types of organizations, including corporations, governments, non-governmental organizations, international organizations, armed forces, charities, not-for-profit corporations, partnerships, cooperatives, and universities. A hybrid organization is a body that operates in both the public sector and the private sector simultaneously, fulfilling public duties and developing commercial market activities.

In the social sciences, organizations are the object of analysis for a number of disciplines, such as sociology, economics, political science, psychology, management, and organizational communication. The broader analysis of organizations is commonly referred to as organizational structure, organizational studies, organizational behavior, or organization analysis. A number of different perspectives exist, some of which are compatible:

- From a process-related perspective, an organization is viewed as an entity is being (re-)organized, and the focus is on the organization as a set of tasks or actions.
- From a functional perspective, the focus is on how entities like businesses or state authorities are used.
- From an institutional perspective, an organization is viewed as a purposeful structure within a social context.



1862 Diagram of the Federal Government and American Union.

In sociology

Sociology can be defined as the science of the institutions of modernity; specific institutions serve a function, akin to the individual organs of a coherent body. In the social and political sciences in general, an "organization" may be more loosely understood as the planned, coordinated and purposeful action of human beings working through collective action to reach a common goal or construct a tangible product. This action is usually framed by formal membership and form (institutional rules). Sociology distinguishes the term organization into planned formal and unplanned informal (i.e. spontaneously formed) organizations. Sociology analyzes organizations in the first line from an institutional perspective. In this sense, organization is a permanent arrangement of elements. These elements and their actions are determined by rules so that a certain task can be fulfilled through a system of coordinated division of labor.

An organization is defined by the elements that are part of it (who belongs to the organization and who does not?), its communication (which elements communicate and how do they communicate?), its autonomy (which changes are executed autonomously by the organization or its elements?), and its rules of action compared to outside events (what causes an organization to act as a collective actor?).

By coordinated and planned cooperation of the elements, the organization is able to solve tasks that lie beyond the abilities of the single elements. The price paid by the elements is the limitation of the degrees of freedom of the elements. Advantages of organizations are enhancement (more of the same), addition (combination of different features) and extension. Disadvantages can be inertness (through co-ordination) and loss of interaction.

Organizational structures

The study of organizations includes a focus on optimizing organizational structure. According to management science, most human organizations fall roughly into four types:

- Pyramids or hierarchies
- Committees or juries
- Matrix organizations
- Ecologies

Pyramids or hierarchies

A hierarchy exemplifies an arrangement with a leader who leads other individual members of the organization. This arrangement is often associated with bureaucracy.

These structures are formed on the basis that there are enough people under the leader to give him support. Just as one would imagine a real pyramid, if there are not enough stone blocks to hold up the higher ones, gravity would irrevocably bring down the monumental structure. So one can imagine that if the leader does not have the support of his subordinates, the entire structure will collapse. Hierarchies were satirized in *The Peter Principle* (1969), a book that introduced *hierarchiology* and the saying that "in a hierarchy every employee tends to rise to his level of incompetence."

Committees or juries

These consist of a group of peers who decide as a group, perhaps by voting. The difference between a jury and a committee is that the members of the committee are usually assigned to perform or lead further actions after the group comes to a decision, whereas members of a jury come to a decision. In common law countries, legal juries render decisions of guilt, liability and quantify damages; juries are also used in athletic contests, book awards and similar activities. Sometimes a selection committee functions like a jury. In the Middle Ages, juries in continental Europe were used to determine the law according to consensus amongst local notables.

Committees are often the most reliable way to make decisions. Condorcet's jury theorem proved that if the average member votes better than a roll of dice, then adding more members increases the number of majorities that can come to a correct vote (however correctness is defined). The problem is that if the average member is subsequently *worse* than a roll of dice, the committee's decisions grow worse, not better: Staffing is crucial.

Parliamentary procedure, such as Robert's Rules of Order, helps prevent committees from engaging in lengthy discussions without reaching decisions.

Matrix organization

This organizational type assigns each worker two bosses in two different hierarchies. One hierarchy is "functional" and assures that each type of expert in the organization is well-trained, and measured by a boss who is super-expert in the same field. The other direction is "executive" and tries to get projects completed using the experts. Projects might be organized by products, regions, customer types, or some other schema.

As an example, a company might have an individual with overall responsibility for Products X and Y, and another individual with overall responsibility for Engineering, Quality Control etc. Therefore, subordinates responsible for quality control of project X will have two reporting lines.

Ecologies

This organization has intense competition. Bad parts of the organization starve. Good ones get more work. Everybody is paid for what they actually do, and runs a tiny business that has to show a profit, or they are fired.

Companies who utilize this organization type reflect a rather one-sided view of what goes on in ecology. It is also the case that a natural ecosystem has a natural border - ecoregions do not in general compete with one another in any way, but are very autonomous.

The pharmaceutical company GlaxoSmithKline talks about functioning as this type of organization in this external article ^[1] from *The Guardian*.

Organization theories

Among the theories that are or have been most influential are:

- Enterprise architecture, is the conceptual model that defines the coalescence of organizational structure and organizational behavior.
- Actor-Network Theory
- Agency theory (sometimes called principal - agent theory)
- Contingency theory
- Complexity theory and organizations
- Critical management studies
- Economic sociology
- Garbage Can Model
- Human Relations Studies (going back to the Hawthorne studies, Maslow and Herzberg)
- Labour Process Theory
- Marxist organization analysis
- Network analysis
- New institutionalism and new institutional economics
- Organizational culture
- Organization ecology (or demography of organizations)
- Scientific management (mainly following Frederick W. Taylor)
- Social entrepreneurship

- Transaction cost economics
- *Weberian organization theory* (refer to Max Weber's chapter on Bureaucracy in his book 'Economy and Society')

Leadership in organizations

A leader in a formal, hierarchical organization, who is appointed to a managerial position, has the right to command and enforce obedience by virtue of the authority of his position. However, he must possess adequate personal attributes to match his authority, because authority is only potentially available to him. In the absence of sufficient personal competence, a manager may be confronted by an emergent leader who can challenge his role in the organization and reduce it to that of a figurehead. However, only authority of position has the backing of formal sanctions. It follows that whoever wields personal influence and power can legitimize this only by gaining a formal position in the hierarchy, with commensurate authority.^[2]

Leadership in formal organizations

An organization that is established as a means for achieving defined objectives has been referred to as a **formal organization**. Its design specifies how goals are subdivided and reflected in subdivisions of the organization. Divisions, departments, sections, positions, jobs, and tasks make up this work structure. Thus, the formal organization is expected to behave impersonally in regard to relationships with clients or with its members. According to Weber's definition, entry and subsequent advancement is by merit or seniority. Each employee receives a salary and enjoys a degree of tenure that safeguards him from the arbitrary influence of superiors or of powerful clients. The higher his position in the hierarchy, the greater his presumed expertise in adjudicating problems that may arise in the course of the work carried out at lower levels of the organization. It is this bureaucratic structure that forms the basis for the appointment of heads or chiefs of administrative subdivisions in the organization and endows them with the authority attached to their position.^[3]

Leadership in informal organizations

In contrast to the appointed head or chief of an administrative unit, a leader emerges within the context of the **informal organization** that underlies the formal structure. The informal organization expresses the personal objectives and goals of the individual membership. Their objectives and goals may or may not coincide with those of the formal organization. The informal organization represents an extension of the social structures that generally characterize human life — the spontaneous emergence of groups and organizations as ends in themselves.^[3]

In prehistoric times, man was preoccupied with his personal security, maintenance, protection, and survival. Now man spends a major portion of his waking hours working for organizations. His need to identify with a community that provides security, protection, maintenance, and a feeling of belonging continues unchanged from prehistoric times. This need is met by the informal organization and its emergent, or unofficial, leaders.^[2]

Leaders emerge from within the structure of the informal organization. Their personal qualities, the demands of the situation, or a combination of these and other factors attract followers who accept their leadership within one or several overlay structures. Instead of the authority of position held by an appointed head or chief, the emergent leader wields influence or power. Influence is the ability of a person to gain cooperation from others by means of persuasion or control over rewards. Power is a stronger form of influence because it reflects a person's ability to enforce action through the control of a means of punishment.^[2]

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- Research on Organizations: Bibliography Database and Maps (<http://ot.cavarretta.com>)
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