

Is Freedom Enough?

An exploratory case study on the links between liberation management and Self-Determination Theory.

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Abstract

This case study looks at the lived experiences of workers, within a manufacturing plant in southern Quebec, undergoing a liberation management transformation. Using the qualitative approach, semi-directed interviews were held as well as non-participant observation and documentation analysis. In total, 18 people were interviewed, recruited on a voluntary basis, and coming from different sectors of the business with a diversity in age, experience and gender. The data collected allowed for a deeper understanding of the advantages, obstacles, expectations, and limitations faced by the workers and the management team (known as coaches).

The liberation transformation was not an easy road but one that enabled workers to experience a sense of freedom, purpose and belonging. Using Self-Determination as a theoretical lens, it was clear that all three components of the theory (autonomy, competency and relatedness) were at the heart of the liberation process, yet a gap remained to grasp the complexity of the transformation. The paradox perspective was mobilized to enrich the understanding of the phenomena and inspired the design of a conceptual model. Well-being and financial performance are seen as by-products of this type of organizational form which makes its study even more relevant.

Practitioners can benefit from a liberation process, yet this type of culture requires a major mental shift, including unlearning behaviors, solid communication, trusting relationships and ongoing training, especially in soft skills, to ensure a smoother transition from traditional management practices. Freedom is one part of the liberation process, but it is not enough in itself. An ability to embrace the paradoxes of freedom and the tensions it generates is fundamental. Finally, trust needs to remain at the core of the initiative, otherwise the risk of manipulation is inherent.

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List of abbreviations

LE : Liberated Enterprise

LM: Liberation Management

SDT: Self-Determination Theor

Chapter 1 : Introduction

1.1 Introduction

The goal of this exploratory case study within a manufacturing plant is two-fold. First, to investigate the lived experiences of workers going through a major cultural shift within their organization. Second, to explore the possible links of this transformation with the well-established Self-Determination Theory (Deci & Ryan, 1985). This research seeks to contribute to existing knowledge by using a critical yet empathetical lens to understand the phenomena. So far, the transformation named *liberation management*, has been studied to confirm this type of organizational form (Getz & Carney, 2009; Getz, 2012; Peters, 1992; Semler, 1989), or to put into question preconceived ideas about it (Weil & Dubey, 2020; Holtz, 2017; Verrier & Bourgeois, 2016; Brière, 2017; Raelin, 2011) or to condemn it altogether (Linhart, 2021, Collectif des Mécréants, 2015). This research will therefore situate itself in the second category, that seeks to understand liberation management from different angles, neither to try to sell the idea as a panacea nor to condemn it. As an empirical study, the desire was also to remain practical and to keep in mind the participants, their experiences and their needs going forward.

The timing of this study makes it even more relevant. The COVID-19 pandemic has brought many questions about the way work is organized and more specifically, about well-being and trust. In April 2021, the renown Chartered Institute of Personnel and Development (CIPD) of the UK published a report entitled: *Health and wellbeing at work 2021*, demonstrating the increased importance of well-being in the workplaces. Many themes were related to flexible work and the support needed in organizations with mental health issues. Surprisingly, the organization of work itself, the impact of the hierarchical culture for example, has not been addressed directly. Yet, when sharing insights about the report, professor Sir Cary Cooper did mention that the type of vertical leadership present in many organizations today had to be rethought and more power needed to be distributed among workers (Cooper, 2021). The underlying structures and beliefs that influence management strategies can be hard to question since they have

been part of the collective story for decades. Yet it appears necessary, especially when speaking of well-being in workplaces, to also address the *leadership* question.

Indeed, literature is plentiful when it comes to leadership. The interest on the leader more specifically has been constant and well documented over the last decades. Researchers have been fascinated by the characteristics and behaviors of leaders, their ability to cast a vision (Westley & Mintzberg, 1989), to be strategic (Finkelstein et al, 2009), to be transformational (Bass & Riggio, 2005), to be a servant-leader (Van Dierendonck, 2011), etc. The list goes on.

And, in more recent years, scholars have also been studying the other side of leadership: followership. Authors on the subject have argued that the followers are not well understood and not portrayed from the right angle (Uhl-Bien et al., 2013).

No matter what research can inform us on the subject of the leader and the follower, it will still be studied under the same paradigm, the one taught in most business schools and the one that we are all familiar with: those that lead and those that don't. Over the years, efforts have been made to share power, as with the study of empowerment (Vogt & Murrell, 1990; McLagan & Nel, 1997), participatory management (Likert, 1967; Kim, 2002; McGregor, 1960), self-directed teams (Wellins, 1991), etc., with the intention of bringing engagement to the workplace. But are the underlying assumptions (McGregor, 1960) of these practices revisited? Are people ready to work and desiring to contribute or do they need to be controlled and pushed (by great leaders) to get anything done?

While the interest on leadership has been high for decades, statistics from Gallup's report (2017) state that "85% of employees worldwide are not engaged or are actively disengaged in their job". Even if the issues of disengagement, mental health, stress, burnout etc., are complex and cannot be directly linked to the concept of leadership, they can, on the other hand, invite us to explore different relationships than that of the

leader-follower one.

Along the same lines, the reflections on these leadership issues are also part of a greater conversation, mainly brought by practitioners in the last decades, questioning the power structures within organizations and seeking to reconfigure management strategies to balance and share power. The holacracy model (Robertson, 2015) developed as a very descriptive approach for collaborative decision making or the sociocracy model developed by Gerard Endenburg (1998), a Dutch engineer that wanted to establish a more efficient and human way to work, away from the competitive relationships that seemed present in many spheres of society.

Ironically, in a world that is more and more tech-focused, the questions on leadership, power structures and well-being in the workplaces, the “HR” questions, will continue to rise. It then seems pertinent to look into experiences of people, in real-life, and expose the unique ways they have found to share power and collaborate together in a trusting manner. Therefore, as for the scope of this study, this thesis seeks to understand the concept of liberation management as lived out within a metal transformation plant. A greater emphasis has been put on the experiences of employees yet the perspective of managers (referred to as coaches) is also put forward. The overall intention is to bring light to a management style that believes that men and women have a mind of their own, can make decisions for themselves and that trusting them is not merely a risk or an innovation but could simply be a natural way forward. Although some links with Self-Determination Theory have been mentioned in the liberation management literature, it has not been done in depth and using this particular theory will allow a more rigorous approach to the phenomena and will form a solid foundation for the conceptual model. For practitioners, it is an opportunity to see a real-life example of a firm going through the liberation process. For researchers and for management departments, it is an invitation to look at other management mindsets that could guide teaching and

researching in a different direction than the traditional leader-follower paradigm.

1.2 Statement of the Problem and Research Questions

Considering the increased interest in well-being and engagement in the workplace as mentioned in this introduction, and the more recent enthusiasm for organizational forms like liberation management, it is pertinent to explore the impact of freedom in organizations. Do workers feel better and work more collaboratively? What are the limitations of this type of endeavor and how does it relate to the fundamental needs of individuals (Self-Determination Theory). And also, is freedom enough or does it need to be integrated into a more holistic perspective?

Consequently, the research questions for this study are:

1. What are the experiences of workers going through the process of liberation within their work environment;
2. What are the advantages, expectations, obstacles and limitations brought by the liberation culture;
3. What are the possible links between Self-Determination Theory and the liberated enterprise?

1.3 Structure of the thesis

The next chapter of this document will present an overview of liberation management and its meaning and literature links. Then a summary of Self-Determination Theory, including a literature review, will follow to give the liberation management a theoretical framework to lean on. Chapter 3 describes the methodology employed then the results from the a case study are exposed in Chapter 4. A discussion and a conclusion, respectively chapter 5 and 6, will conclude the study.

Chapter 2 : Literature Review

This chapter will introduce the notion of Liberation Management: the core values, key features, benefits and challenges. A theoretical background is also presented followed by a section on Self-Determination Theory and the links between this theory and liberation management.

“Also, may we suppose, in principle, that the scientific organization of work will only have achieved its purpose when it will have enabled, not only the physical capacities of the worker, but the entire spectrum of a man’s intellectual and moral forces when he works in a complete state of freedom”.
Hyacinthe Dubreuil, 1935 (translation by this author)

2.1 The Concept of Liberation Management

2.1.1 Introduction

The first part of the thesis is a review of the literature on the subject of liberation management. The quote at the beginning of this text is from a book written in 1935 by Hyacinthe Dubreuil, a French syndicalist born in 1833. His book *A chacun sa chance* exposes a similar idea as McGregor’s, (1960), Tom Peters (1992) and more recently Isaac Getz and Brian M. Carney (2009). In sum, if workers were free to make decisions and treated as adults, organizations could perform better.

Looking back at the writings of Douglas McGregor in 1960, we can see that his idea was rooted in the belief that workers could be motivated to work and find fulfillment through their work (McGregor, 1960; Getz, 2009; Mattelin-Pierrard et al., 2018). It appeared that during the time of his writing, the popular belief was that managers had to push, control, command and supervise their employees if they wanted to get anything done. McGregor’s vision was in many ways revolutionary since he argued that contrary to the ambient belief, people had a *desire* to work, to contribute and use their talents for a greater purpose. Not only did employees want to participate actively in the business, but they also took pleasure in doing so. From this perspective for example, the challenge of a worker’s performance or capacity for innovation was not about dealing

with lazy or unmotivated employees but rather about the underlying belief about their motivation and the work environment that was generated because of that same belief (McGregor, 1960; Getz, 2009).

In 1992, Tom Peters, a well-known consultant, published his book *Liberation Management* where he exposed his conviction on how businesses could be better managed. He argued that the time had come for organizations to let their employees take center stage and for the supervisors/managers to step aside (Peters, 1992). At the heart of the idea was the necessity for trust, open communication and intrapreneurship to rise within the workplace and that old ways of doing business were not sustainable any longer. Although the book was written almost 30 years ago, today there are still very few companies calling themselves *liberated*. If that type of culture really brings results and enables people to be happy and more productive, why isn't the movement towards it more popular? This section seeks to understand better what liberation management is about, its importance and how it has been treated in the literature thus far.

Although liberation management is not clearly defined, it is neither a business model, nor a philosophy, or a mindset or a concept, (Gilbert et al., 2017), in this thesis, it will be referred to as an organizational form (Getz, 2009). The abbreviation LE will be used to lighten the text and will interchangeably mean liberation management, liberation enterprise or liberated enterprise (singular or plural) which means that an enterprise has gone or is in the process of liberation.

2.1.2 Liberation Management Summary

"There is no contest between the company that buys the grudging compliance of its work force and the company that enjoys the enterprising participation of its employees."

-Ricardo Semler

a) *Core Values*

Before talking about the key features of liberation management, it is important to understand the underlying values that led to its creation in the first place. As mentioned in the introduction, McGregor believed that workers were capable people and could take pleasure in using their skills and talents and so he developed a theory based on these assumptions. The theory X and Y showed two opposite visions about workers. They either were lazy, unmotivated and could not be trusted (Theory X) or they were trustworthy, well intentioned, and capable of great things (Theory Y). Between those two fundamental views of workers, may have lied a middle ground but this was not covered in McGregor's studies (McGregor, 1960; Getz, 2009; Laloux, 2014).

Coming from that angle, if Theory Y were true, then certain values would guide the way in which those workers could be *managed* and the type of environment they would work in. Linking this to liberation management, it is believed that all humans are equal and trustworthy, therefore the idea of self-control, transparency and trust are at the heart of any decision. Even if in today's age, these values are well received and can be used by certain business leaders, the questions remain as to how they are actually being integrated within organizations? What does it look like when a boss really believes that employees are capable people, motivated and that they can be trusted and treated as equals? Although these values can be written on paper, the challenge is to have a business, an organization that can embody those same values in their practices, every day (Getz, 2009). In the next section, some of the key features that represent this type of organization will be explained.

b) *Key Features*

Even though there is not *one* model for the LE and each organization has developed their own different practices and philosophies, there are some attributes that are commonly featured within LE (Getz, 2009; Chabanet et al, 2017). Probably the most

important element is the ability for employees to act in freedom and to make decisions on their own. As mentioned earlier, if the belief is that employees are capable and trustworthy, it would follow that the people closest to the issues involved will be highly involved in making the decision to solve or resolve those issues, like the need to hire someone or to replace a piece of equipment (Getz, 2009). Consequently, governance systems such as financial matters, planning and control are also redesigned.

Along the same lines, certain LE give the entire responsibility of recruiting, hiring, and coaching to the employees themselves. Once again, since for example, people that are on the shop floor are the most significantly impacted by the arrival and performance of a new colleague, they have the responsibility of choosing whom they will work with and how they are trained (Gilbert et al., 2017).

In other LE, the salary and schedule will also be determined by the workers. Since this type of decision can be crucial for a business, the information about the financial situation of the organization is known and communicated openly to staff. It is also expected that the profits will be distributed in a manner that reflects the idea that each employee is viewed as equally important. Therefore, LE have a different way to redistribute their wealth so that it is aligned with the overall culture of liberation (Getz, 2009; Gilbert et al., 2018). Yet, it is important to mention that the topics of profits and salaries remain controversial within the literature, since they have not been approached with the same depth and critical lens by different authors (Getz, 2009; Verrier & Bourgeois, 2016; Peter, 1992; Robertson, 2015). Even if some measures may seem superficial, visual signs of hierarchy for example, such as a reserved parking spot or dress codes to distinguish managers, they are elements that are rarely found in LE settings (Getz, 2009).

The role of planning is also challenged, where it is more loosely performed, and it is not reserved to management. In fact, the idea is once again to have as many people

involved who are impacted by the process. Management's role is to act as an enabler and make information available and to coordinate the efforts to ensure and encourage everyone's participation (Getz, 2009; Gilbert et al., 2017).

Finally, since the need for supervision and control takes a different form, the control is more or less lived out within the group, something resembling peer pressure. Many layers of management are also cut and that leaves the existing managers to play the role of mentors and guides (Getz, 2009; Gilbert et al., 2017).

c) *Expected Benefits*

The liberation of an organization can be a long process and takes on different forms. Like the common features found in LE, there are benefits that can be seen across the majority of LEs when this type of culture is introduced. One of the most popular advantages of running a LE is related to healthier financial performance. The correlation has yet to be studied in depth, however it is often described in articles and papers as a natural impact of having employees that are free to make decisions and that are engaged in making their organization succeed (Getz, 2009; Gilbert et al., 2017).

Another benefit experienced by some LE was their capacity for innovation (Gilbert et al., 2017). Having employees highly involved and encouraged to think for themselves and bring solutions enabled new ideas and new processes to emerge. While more innovation and a better financial situation are essential, there are also other important elements that can result from the liberation process like the happiness or well-being of employees and a lower staff turn-over. While it is agreed that the LE is not for everyone, (Colle et al., 2017) the expected benefits seem to be quite convincing. If that is the case, why are not more organizations turning to this organizational form?

d) *Challenges*

Although the stories and cases written on LE are mainly positive and based on values that are often shared by many organizations already, like better communication, transparency, empowerment, etc., it remains a challenge to put those values into action. A LE doesn't come to life in a short period of time and the early beginnings can also be described as chaotic. Since many workplaces today are still based on a hierarchical model and centralized decision making, the switch to a new way of thinking and doing things doesn't happen overnight. It is a hard and long transition, some LE have said that it can actually take up to ten years to really change the way the organization functions (Getz, 2009). It is also a very fragile culture, in the sense that it can be easier to fall back on "old ways" when going through rougher times. It also calls for a different type of leadership which means that management has to review how they do things but most importantly, who they are as leaders within LE (Getz, 2009). Sometimes it is also harder to get newcomers on board, since the way LE functions is different from what they are used to, what they know. Also, even if the idea is for everyone to share and build in that new form, it remains that a certain number of key people are responsible for the vision and if these key actors leave the organization, there is no guarantee that the liberation process would survive them (Colle et al., 2017).

e) *What the liberated enterprise is not*

While the expected results can be seen as overcoming the associated challenges, it is also important to distinguish certain elements within LE. There are misconceptions about what it is. The first misbelief is about the total absence of hierarchy (Colle et al., 2017). While it is true that employees act in greater freedom as they are seen as equals and while many layers of command do disappear in LE, there is still a form of hierarchy that exists but that is lived out differently than within a "traditional" organization (Laloux, 2014). In most cases that have been exposed in the literature, leaders were still playing a role within LE and it was not specifically related to command and control but

mainly to guide and to counsel. In summary, they are responsible for the overall vision and for making sure that everyone is on the same page with how LE functions.

One of the other popular beliefs about LE is the idea that everyone does what she/he wants. While this could sound like freedom, this not how LE is working even though there is greater flexibility for workers to do what they think is best. The goal still remains to advance the organization's interest. If workers decide to change production or to revise schedules for example, it would have to be because they assume that these decisions would bring the company to a better place (Getz, 2009).

Also, maybe the more optimistic will imagine that a LE is the dream company where there are ping pong tables, free food and high salaries... Even if a LE could have these perks, they are not the ultimate goal nor vision of this type of organization and LE is not always similar to having a "google workplace atmosphere" (Carney & Getz, 2015; Laloux, 2014). It is also different from a cooperative model where each member has a right to vote and decisions are entirely made through a democratic process. Within LE, the decisions are not necessarily made within a democratic model, rather they are based on the idea that the person closest to the situation will have the best knowledge and therefore should make the decision. There is also an expectation that depending on the nature of the decision and its impact on the organization, it is important to consult with other colleagues to ensure that all angles are covered (Getz, 2009).

Finally, LE is not a place where chaos reigns and certainly not inherent in its structure, rather much of the chaos attributed to this form of organization would be from the transitioning towards that form as opposed to the steady state once LE has been embraced. As most LE practitioners will mention, having different parameters to go by will certainly bring phases where chaos will happen, yet this "planned" chaos is

understood as part of the innovative process.

f) *Relevance*

Because the liberation process represents a significant challenge in and of itself, where an organization decides to change its form to bring about this type of change, there are multiple reasons why it can be useful to understand the types of organization that are embarking on this process because of the depth of transformation that they are considering. While there are no perfect ways to manage, there are ways that seem to put more emphasis on the well-being and also the potential of each individual (Getz, 2009). LE culture is certainly a model that fits this category. While research into this type of work is still limited, the business environment has gone through tremendous changes over the last decades and it is necessary to have fully engaged workers to come up with new ways of doing things. It has been shown that to ensure innovation within any type of organization, a good level of trust is necessary (Singh & Srivastava, 2016; Gustafsson et al., 2020; Mayer et al., 1995; Gupta et al., 2011). LE has this as a core priority.

Another important reason LE is of interest for organizations is the necessity of having the engagement of workers. While there are many ideas put forward to improve workers' attitude, well-being and productivity, the uniqueness of LE is the holistic approach it puts forward (Laloux, 2014). LE is not about a few measures implemented sporadically but rather a rethink of the underlying assumptions about how the workers are viewed and treated. This complete new set of assumptions then leads to a different way to function and that is true for all parts of the organization. So, taking a closer look at LE means coming at human resources management and the business model from a different angle and these reflections are so pertinent when considering the importance of having a motivated and engaged workforce (Getz, 2009; Colle et al., 2017).

Lastly, even though the last decade has brought forward new vocabulary to talk about human resources and new ideas and interests on the key role of people within

organizations, the Gallup report (2017) or the Chartered Institute of Personnel and Development report (2021), point to a harder reality in workplaces: disengagement, presenteeism, mental health issues, etc. It seems legitimate to then ask if significant changes actually happened to the organizational structures of businesses? Or is it just a new semantic describing the same reality?

It has been hard, within the existing paradigms, to challenge some hard-held beliefs about how workers need to be controlled and supervised. Plan, organize, direct and control (PODC) is still taught in business schools. LE form is therefore a tangible way to see how an organization that puts people first does that in actions, in concrete ways, in everyday practices, no matter the sector nor the size, and that in itself can be a useful exercise (Colle et al., 2017).

In summary, to encourage innovation, to review the status quo and to try to make changes that are more than cosmetic and applied to the organization as a whole and to witness an organizational cultural transformation all together, it is therefore important to understand and research LE. Table 1 on the next page is an illustration of the differences between a liberated enterprise and a more traditional one. This table, although not exhaustive, serves as a reference to quickly understand some of the main aspects put forward by LE. As mentioned before, there is not one LE model but these characteristics seem to be common in many examples cited in LE literature.

Table 2.1 Differences between traditional and liberated enterprises

Key Elements	Traditional	Liberated
Style of leadership	Centralized, top-down	Decentralized
Leader's role	Supervisor	Facilitator/coach
Motivation	Extrinsic	Intrinsic
Values	Performance, power, competition	Equality, collaboration, trust
Underlying beliefs	Workers don't want to work; they need reward or punishment	Workers want to work and contribute, they need coaching
Structure	Vertical	Horizontal
Hierarchical symbols	Corner office, reserved parking, dress code	None or very few
Management focus	"How" to do things	"Why" to do things
Control	Done by supervisor, managers, etc.	Done by peers and by worker himself/herself
Power of decision	Person with authority	Person that will be most impacted by the decision
Hiring power	Human Resources department	Teams/workers
Responsibility for establishing rules	Management	Teams/workers
Recipients of strategic information	Management	Teams/workers
Attitude towards failure	Can lead to sanction	Opportunity to learn, source of growth
Thinking and execution	Separate function: thinking done by management who then will tell workers what to do	Integrated, workers can think for themselves and execute what they think is best for the company

(Source: Designed by author (inspired from Reinventing Organizations, F. Laloux, 2014))

2.1.3 Liberation management: theoretical foundation

a) *Theoretical background*

Liberation management remains an understudied phenomenon and very few studies have linked the concept to existing theories. Yet, Pierrard et al., (2020) have established in their systematic literature review that Liberation Management fits the criteria of a *concept* in its academic sense. They also classify LE as Innovation Management (IM),

which is defined by Birkinshaw et al., (2008) as: *the invention and implementation of management practice, process, structure, or technique that is new to the state of the art and is intended to further organizational goals*. Since the purpose of this research was to explore LE and also help practitioners (Hodgkinson et al., 2001; Cunliffe & Scaratti, 2017; Pettigrew, 2001) clarify how it works (or not), the conceptual work of IM was less appropriate to meet this goal.

One important theory that has been mentioned in some LE research and books is the Self-Determination Theory by Deci and Ryan (1985) two psychologists and their associates. Their work has been often associated with the motivation literature (Getz, 2009). Since LE is coming from a perspective that workers are well intentioned and are moved by the desire to work for the good of the organization, the paradigm shift is quite important. These two psychologists also stipulate that to be motivated and engaged, three main elements need to be present in a person's life: competency, autonomy and relatedness.

If we bring these elements into the workplace, the first element, competency, is related to the idea that people need to feel they are capable of accomplishing the task at hand. If it is too easy, then the motivation may be missing and if it is too hard, discouragement could take place. Therefore, the right amount of challenge is required to ensure workers feel competent and have an interest in doing the task. The second element, autonomy, refers to the idea that the person doing the work has flexibility and freedom to go about her/his task. This feature in the theory is probably the one that has the strongest association with LE. While someone may feel competent in doing her/his work, she also needs to feel like she is trusted to do so and has the liberty to go about her work in the way she believes is best. Lastly, relatedness refers to the idea that the worker will also feel part of a greater group, will be able to experience a sense of belonging within his workplace. The authors also explain that the theory is meant to encompass the three elements and for workers to experience well-being, competency, autonomy and

relatedness all have to be present. Even if autonomy seems to be closely tied to the LE, all elements of the Self-Determination Theory appear to be naturally related to the foundation of liberation. Still, not much research has been done to explain and explore those links.

In the literature on LE, the few existing studies so far have shown interesting results and also, some limitations. To start with, studies have all been carried out in Europe and the United States and, to my knowledge, nothing has been written within a Canadian setting. Most cited companies also have a few hundred employees, like Favi (430 workers), Poult (300 workers), Chrono-Flex (250 workers) (Gilbert et al., 2017). Therefore, LE explained from an SMEs' perspective could be helpful and relevant within Canada's business landscape.

The same comments could be made for the type of organizations that have been studied. To my knowledge, nothing has been written within the nonprofit sector. While private business may have similarities with nonprofits, it is still a different culture and philosophy and to explore a liberation process within that type of organization could lead to new insights to increase well-being, innovation and attractiveness within the nonprofit sector.

Also, the literature on LE has only shown studies with male CEOs and within the sole ownership model (Prades et al., 2018). Are there any woman CEOs that have been involved in LE? And how is it that after being *freed*, there are not any further consideration about ownership within the enterprise? The LE literature has functioned within the existing paradigm within which LE has been created. Lastly, the literature has focused on certain themes particularly on leadership of the *owner of the transformation* (Casalegno, 2017), once again not questioning the model of *The Leader that has changed the company discourse* (Gilbert et al., 2017). What if it was a collective

endeavor? Table 2 below summarizes the key elements and possible gaps identified in the literature on LE.

Table 2.2 Key elements and possible gaps in the study of LE

Level of study	Key elements	Possible Gaps
Human level	Leaders' stories and motivations (Getz, 2012) (Semler, 1989) (Getz, 2009)	Almost nothing on the subject of workers
	Competencies needed from leaders (Chabanet et al., 2017) (Getz, 2009)	Almost nothing on the subject of workers' competencies
	Importance of recruitment (Colle et al., 2017) (Chêne & Le Goff, 2017)	No mention of situations when hiring someone that "fits" is not an option
	Importance of training (Holtz, 2017) (Prades et al., 2018)	Little details about the training that goes on (other than there isn't enough of it)
Concept level	Types of organizations studied (Chabanet et al., 2017)	Still very few organizations studies, often the same ones, none from Canada
	Historical background (roots) (Gilbert et al., 2017) (d'Iribarne, 2017)	Theory Y often mentioned, yet very diverse origins depending on authors
	Benefits and expected results (Mattelin-Pierrard et al., 2018) (Colle et al., 2017) (Semler, 1989) (Getz, 2009)	Financial performance and workers well-being yet not direct link established scientifically
	Key features of liberated enterprises (Chabanet et al., 2017) (Gilbert et al., 2017) (Carney & Getz, 2018) (Ducatteuw, 2017) (Prades et al., 2018) (Semler, 1989)	Nothing about sustainable development
	Possible theoretical links (Antoine et al., 2017) (Mattelin-Pierrard et al., 2018) (Marmorat & Nivet, 2017) (Prades et al., 2018) (Gilbert et al., 2018) (Landivar & Trouvé, 2017)	Certain links to theory but remains limited
	Concept definition (Casalegno, J., 2017) (Mattelin-Pierrard et al., 2018) (Brière, 2017) (Landivar & Trouvé, 2017) (Mattelin-Pierrard et al., 2020)	No consensus on what <i>is</i> the liberation: movement, culture, philosophy, concept. Mattelin-Pierrard et al., 2020: after a systematic literature review confirm EL is a concept
	Challenges faced by liberated enterprises (Chabanet et al., 2017), (Gilbert et al., 2017) (Getz, 2012) (Gilbert et al., 2018)	Challenges are studied yet not much written from a critical point of view
	Values behind the liberation concept (Jacquinot & Pellissier-Tanon, 2015) (Brière, 2017) (Chêne & Le Goff, 2017) (Gilbert et al., 2018) (Semler, 1989) (Getz, 2009)	Values mentioned from an organization's perspective, not from the workers' perspective

b) *Preferred methodology and authors*

Most studies on the subject of LE have been empirical (Colle et al., 2017; Gilbert et al., 2017) based on a qualitative methodology: case studies, semi-structured interviews, on-site observations, document analysis, and one systematic review (Mattelin-Pierrard et

al., 2018). It has also been a field where consultants, like Tom Peters and Frederic Laloux have had a strong voice and only a few scholars such as Isaac Getz have written on the matter. The companies cited by most authors are also often the same ones, which comprise a group of 10-15 companies and are the “classic” cases: FAVI, Gore & Associates, Harley Davidson, Quad Graphics, etc. (Getz, 2009).

The subject of LE is still not well documented by scientific studies drawing on theories (Prades et al., 2018; Landivar & Trouvé 2017) and the examples of companies cited in books and research articles can sometimes feel like the telling of success stories while ignoring some negative sides. (Gilbert et al., 2017; Verrier & Bourgeois, 2016). Still, since it appears to be an emerging field that has started empirically, it is probably normal to see dispersed publications and less of an emphasis on theories at this point.

There are also no Canadian scholars writing on the subject, and so far, a few Québec firms have had media exposure (Machillot, 2018), but nothing done on the research level.

2.1.4 Liberation management: remaining questions

There are a limited number of papers and books, mainly descriptive, on the subject of liberation management that have been published thus far, liberation management is an emerging field of research and there are a lot of questions that remain. The questions of performance indicators, workers’ perspective and sustainability seem to be relevant at this point.

c) *Evaluation*

For example, since LE is based on another set of assumptions about workers and their capacities, what are some indicators of success that have been developed to measure the health of a LE? So far, growth, financial results and overall performance have been used, just like a more traditional enterprise would do (Getz, 2009). Would a LE have another set of criteria to evaluate its progress since by nature the values and culture

depart from a more conventional enterprise? For example, how are employees growing within LE, how much profit is shared? How are suppliers involved and how is the quality of the communication within and outside the LE?

d) *Workers' perspective*

Also, as mentioned earlier, most examples are based on the vision of one or two individuals that had *a vision* for liberating their enterprises. Can a vision be supported by the employees themselves, and how? If a leader is responsible to bring the vision alive, then isn't the LE subject to similar threats as the traditional hierarchical organization? In most publications there is a quest for understanding the *type of leader* it takes to make the LE work (Pierrard et al., 2018). What about the question of *what kind of employees* does it take to make this transformation happen? How can they help in shaping and maintaining the culture of liberation?

e) *Sustainability*

Also, considering the values and vision of a LE, links to sustainable development have not been mentioned in any publication. It would be interesting to see how an enterprise that cares for the growth and well-being of people could extend that to the planet? (Laloux, 2014).

Many other areas could be of interest in better exploring and understanding LE. So far, little has been written on the subject even if some powerful insights have been shown as well as the pertinence of a different culture deemed valuable in today's business environment.

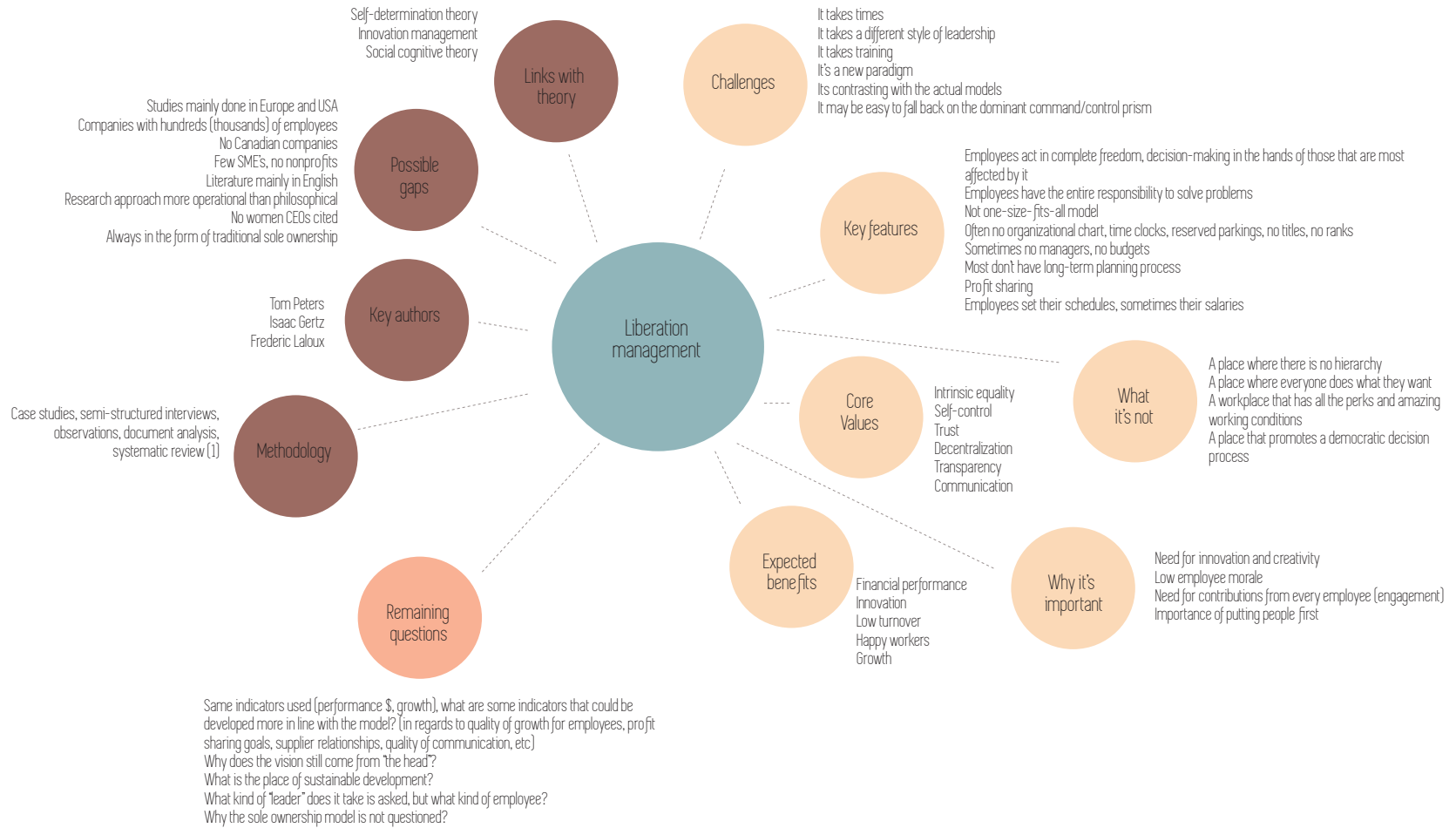
2.1.5 Visual Overview

Since LE remains somewhat ambiguous and its ramifications are multiple, before entering the exploration part of this paper, presented on the next page is a visual overview which summarizes the main themes that will be covered. The exploration is presented on the right (yellow circles), while the methodology (red circles) and remaining questions (pink circle) complete the picture and thus allow for a general

perspective of the subject.

To conclude, a visual summary below is included to illustrate the essential elements of this section.

Figure 2.1 LE Section Summary



2.1 Self Determination Theory

2.1.1 Introduction

Although the literature contains no in depth study linking liberation management and Self-Determination Theory, there is an interesting path to explore between these two notions. Self-Determination Theory as it will be explained in this section, has exposed the three fundamental needs of human beings that nourish intrinsic motivation (Ryan & Deci, 2000): affiliation, competency and autonomy. Yet, if an organization is promoting growth in terms of skills (competency), intrinsic motivation will not be enhanced unless the sense of autonomy is present (p.58). Since liberation puts autonomy as a priority in its model, it is then pertinent to see what the impact is for the workers, in terms of well-being and performance specifically. This section presents Self-Determination Theory and its link with liberation management will follow.

a) *Context*

When Deci and Ryan first came up with their theory of self-determination (SDT), they had a desire to bring a different vision on motivation since up to that point, research had focused mainly on understanding, predicting and controlling behavior through external sources (Ryan & Deci, 2017). SDT would look for the source of motivation from within the individual and would state that given the right environment and the right nutriments, people could strive and be well. By desiring to understand human behavior through this lens, Deci and Ryan studied various types of control, motivation, needs and context. A brief summary of these elements is now presented.

b) *Control*

The idea of control is complex and has been at the center of many management strategies within all types of organizations (Seddon, 2019; Mládková, 2015). McGregor was addressing this issue when he wrote about the underlying assumptions regarding workers and their needs to be controlled. In sum, he stated that if people were believed to be trustworthy and motivated, then the need to control would not be present

(McGregor, 1960). Deci and Ryan took the same approach and experimented with different types of control to understand its impact on people and on performance. They concluded that any forms of control and surveillance were in fact, producing lesser results in terms of performance and also in terms of well-being for employees. Therefore, SDT would suggest that in place of control, managers could instead encourage, give informational feedback and support their teams and that would yield much better results (Deci & Ryan, 1985; Manganelli et al., 2018).

c) *Motivation*

Motivation is at the heart of SDT work. Although it was more common to distinguish two forms of motivation: extrinsic and intrinsic (Vallerand, 1997; Bénabou & Tirole, 2003), Deci and Ryan have developed a more nuanced vision. While intrinsic motivation is linked to an activity that one enjoys doing for the sake of doing it, extrinsic motivation is related to an external motive that is outside of self. It can be as a result of rewards or control for example (Deci & Ryan, 1985). Yet, extrinsic motivation can be defined in four sub-categories: external regulation (1), introjected regulation (2), identified regulation (3) and integrated regulation (4). External regulation (1), is the weakest of the 4 types and is triggered by rewards or punishment and it will produce compliance rather than adhesion or engagement. Introjected regulation (2), is also considered a weak form of motivation and it is related to the ego of the person so the motivation could be to please or impress others. Identification (3) is a stronger form of motivation which implies that the person doing the task or activity, does it with a conscious desire and she endorses the goals behind the action. Finally, integrated motivation (4), is the most powerful form of extrinsic motivation and brings the person to fully accept her action and to feel in congruence with them, although these actions or tasks are not inherently enjoyable in themselves (Deci & Ryan, 2000; Gagné et al., 2000). External and introjected regulation are known to be superficial, short lasting and are situated completely outside of a person's values, norms and personal sense of self. On the other end of the spectrum, identified and integrated regulations are still from external

sources, but would have similar properties of intrinsic regulation, and therefore could be long lasting and showing positive links to well-being and satisfaction, especially integrated motivation (Gagné & Deci, 2005).

d) *Needs*

Another major finding in Deci and Ryan's Self-Determination Theory is the discovery of three psychological needs that are universal and ensure well-being and satisfaction. These three needs are relatedness, competence and autonomy and can be summarized briefly. Relatedness is understood as a feeling of relating to a group, of *belonging to*, being integrated in social networks. In a work context, it can be the relationships built with colleagues, with managers, etc. (Reis et al., 2000). The second element, competence, is linked to the ability to accomplish a task that is within someone's range, not too hard nor too easy. Competence is a way for a person to display her talents and abilities and to feel empowered. And finally, autonomy, is related to the freedom to make decisions, for a person to have a sense of control over her own life and work (Sheldon et al., 2003, 2015). Relatedness, competence and autonomy are not only significant for well-being and satisfaction, but they also have to be present together, as a whole, for the benefits to be experienced. In relation to the types of motivation cited previously, Deci and Ryan conclude that: "These are but a few of many findings suggesting that supports for relatedness and competence facilitate internalization and that supports for autonomy also facilitates integration of behavioral regulations. When that occurs, people feel not only competent and related but also autonomous as they carry out culturally valued activities" (Ryan & Deci, 2000, p.74).

e) *Locus of causality*

Unlike locus of control, that is related to the belief that *outcomes are controllable*, in other words whether outcomes are believed to be contingent on one's behavior, (Deci & Ryan, 1985, p.166), locus of causality is related to a person's *perceived source of initiation and regulation of behavior* (Deci & Ryan, 1985, p.166). Within SDT, it is understood that the more a person will see the regulation as external or introjected, therefore non-autonomous, the less likely that positive results will appear. Furthermore,

the more the person sees an action as personally regulated, what is called internally perceived internal locus of causality (I-PLOC), the more positive results will be associated with it (Ryan & Deci, 1985, p.167). The role of autonomy is therefore shown to be central to well-being and to performance in organizations (Ryan & Deci, 1985; Manganelli et al., 2018).

In summary, SDT is about a more detailed view of extrinsic motivation, where internalized and integrated motivation can be seen as essential to ensure performance and well-being. Then, autonomy, relatedness and competence work hand in hand as the three fundamental needs of human beings and autonomy is central for people to develop integrated motivation. Along the same lines, control and surveillance are believed to be counterproductive as they diminish people's need for autonomy. (Gagné & Deci, 2014). Finally, for any strategy to succeed in bringing performance and well-being, they will need to be done in a context that is supportive, once again, of the three basic needs of relatedness, competence and specifically of the need for autonomy.

Since 1985, Ryan and Deci's work has been empirically validated and many researchers over the world have taken part in making SDT a strong and meaningful area of research and practice. Still, many areas remain to be studied and what is of interest for this present article is the connections between the three fundamental needs and how they can be nourished at work and more specifically within a different organizational form, like the liberated enterprise. The authors are not explicit about specific models that would be more efficient in this regard.

2.2 Exploring the relationship

2.2.1 Links between Self-Determination Theory and the liberated enterprise

As mentioned earlier in this thesis, the liberated enterprise (LE) is based on the assumption that workers are trustworthy and that if the work context is facilitating, they will naturally put their best selves at work. Based on this assumption, all methods of

controls become obsolete. LE, is a concept that has been promoted by Tom Peters (consultant) and Isaac Gezt (professor) over the last two decades. It has not been extensively researched yet it brings forward an innovative way to work if we consider that putting the well-being and autonomy of workers at the forefront is actually an innovation. In sum, LE is about letting people closest to the situation make the decisions that matter, it is about trusting workers to do what is best and to support them instead of supervising them (Getz, 2009).

While the link with LE and SDT has been loosely made in some articles (Getz, 2009), it would seem natural and practical to make the connections between these two notions. If SDT is about three fundamental needs; relatedness, competence and autonomy, then a workplace that seems to nourish these needs would certainly be of great interest. Since autonomy is a prime feature of LE, it is certainly a good start. When it comes to competence and relatedness, although the claims are not as direct, LE also seems to address those needs. The important element to remember from Deci and Ryan is that having two needs present is not sufficient, all three have to coexist for people to experience well-being and satisfaction. And as research has already demonstrated, employees that are well and whose needs are satisfied will perform well (Gagné & Deci, 2005).

2.2.2 Summary

In summary, since liberation management is about letting the workers use their talents and be free to make decision and have a control over their work, why is it still rarely found in businesses today? And if Self-Determination Theory, a widely used theory that has been tested in numerous contexts (Manganelli et al., 2018; Shelon et al., 2015; Decy & Ryan, 1985), has shown that autonomy, affiliation and competency were the three basic needs of individuals, why has the hierarchical paradigm not been challenged within that theory?

SDT has demonstrated that when a task is not inherently enjoyable, as it is the case in intrinsic motivation, the goal of an organization would be to sustain an environment where integrated motivation (the strongest form of extrinsic motivation) can be lived out. Also, even if the feeling of competency and affiliation is present within workers, the key element of this combination is the role of autonomy. Since autonomy is at the heart of the liberation management concept, the link between these notions is important to explore and could help explain certain best practices as well as limits and challenges. To also ensure a better understanding of the phenomenon, additional theoretical elements will be included into the analysis: the concept of unlearning as well as the paradox perspective. The last section of this chapter will give an overview of these important notions. A case study will follow as an attempt to bring together the notion of Self-Determination Theory, liberation management and the paradox perspective.

2.3 Additional theoretical support

Although SDT will bring an interesting light to the study of liberation management, the use of an additional theoretical support will also help situate LM within a more complete framework and the paradox perspective was suited for this purpose. Also, to ensure a better understanding of the case study, an overview of the concept of unlearning is included in this last section.

2.3.1 Paradox perspective

The study of paradox within organizations has been a subject of interest for many years (Cunha & Putnam, 2019; Smith & Lewis, 2011) and has brought a more complex and holistic view of systems and especially of what could be seen as opposing elements within the system. Initially, it was believed by some authors that hard choices had to constantly be made between competing demands (Smith & Lewis, 2011; Ricciardi et al., 2016) but paradox perspective brought forward the notion that the goal was not about making choices but rather, accept and compose with the reality of tensions within organizations. For example, the dilemma between exploitation and exploration

(Andriopoulos & Lewis, 2009), where a manager would need to focus on already proven recipes or chose to develop new products and ideas. Yet, ideally these two strategies should not be seen as opposite demands but rather as an opportunity to embrace both exploitation and exploration.

With the intention of digging deeper into the notion of paradox and establishing a theory, Lewi and Smith wrote an article (2011) revising the literature on paradox and came up with a model that would enable organizations to leverage their paradoxes with the intent of finding a *dynamic equilibrium* (p.389). The model could inspire the study of liberation management and help understand the dynamics at play and since most scholars have been writing about paradoxes within innovation and business models (Ricciardi et al., 2016; Andriopoulos & Lewis, 2009), decision making (Waldman et al., 2019) or sustainability (Jay, 2013; Margolis & Walsh, 2003; Hahn et al., 2018), therefore the use of this theory applied specifically to an organizational *form* like LM, gives it new meaning.

In sum, paradox perspective, *a persistent contradiction between interdependent elements* (Schad et al., 2016) proposes that leveraging what is seen as opposing demands, could lead organizations to success (Heracleous & Wirtz, 2014). In the context of this research project, this perspective could help explain some of the challenges of LM and expose how they could be dealt with.

2.3.2 *Unlearning*

To conclude this literature review, one last notion to include is *unlearning*. Not classified as a theory, it has brought scholars mainly in the field of organizational studies and business administration to question how people discard knowledge to make room for new learning (Zahra & Tsang, 2008; Hsu & Pedler, 2014; Nystrom & Starbuck, 1984). It has been exposed as a key component for the future of organizations (Akgün et al., 2007; Tsang & Zahra, 2008) yet the lack of empirical research (Tsang & Zahra, 2008; Fiol

& O'Connor, 2017; Klammer & Gueldenberg, 2019) as well as the absence of scholars from field of psychology and neurosciences could explain why the notion of *unlearning* remains somewhat vague. Despite this reality, what is known about *unlearning* make it a very relevant component to include in any organizational reflections on change.

The process of unlearning is different from forgetting since *unlearning* needs to be a conscious and intentional endeavor (Pedler & Hsu, 2014; Tsang & Zahra, 2008). It can be about behaviors and values, etc., but it is often talked about in the form of routines and specific skills. It is unclear how people *unlearn* but it is believed that to make room for new routines or behaviors, there is a need for *discarding of old routines to make ways for new ones, if any* (Tsang & Zahra, 2008, p.1435). In the context of going through a major organizational reform, it would seem pertinent to include the notion of *unlearning* since it requires a cognitive shift (Nystrom & Starbuck, 1984) from all people involved in the transformation.

The application of *unlearning* to LM has not been studied but it is indeed a situation where norms, values and beliefs about hierarchy for example, need to be *unlearned*.

In conclusion, the perspective of paradox and how organizations need to learn to integrate what could be perceived as conflicting strategies and the notion of *unlearning*, where organizations need to discard irrelevant knowledge and behaviors, can both bring a deeper understanding of a liberation transformation.

The next chapter will expose the research design and methodology and the results and discussion will follow.

Chapter 3 : Research Design and Methodology

3.1 Introduction

The aim of this thesis is to explore the lived experiences of workers and to take a closer look at the impact of liberation management and its possible links with Self-Determination Theory. The next section focuses on the research design and methodology and expose what research instruments were used to understand the phenomena.

3.2 Research Design

3.2.1 Qualitative approach

The qualitative approach was chosen for this study to enable a contextualized and rich description of the phenomenon (Eisenhardt, 1989; Marschall & Rossman, 2011; Myers, 2013). The possibility to access the reality of the workers, in their natural setting, through in-depth interviews and onsite observations would bring insights and links that could not have been explored otherwise (Miles et al., 2014; Marschall & Rossman, 2011). Taking into consideration the reality of shop floor workers, with some of them having low interest in technology and others qualifying as functional illiterates, using an online survey for example, would not have been respectful of the context.

3.2.2 Case Study

One case was chosen for the study to ensure a deeper understanding of the reality of the liberation process as lived by the participants within the context of their work environment (Eisenhardt, 1989; Volmar & Eisenhardt, 2020). As described by Yin (1981), “if one is desirous of answering *how* and *why* questions, instead of or in addition to questions of frequency, case studies are the more appropriate strategy”. The metal transformation plant accepted to be part of the study and to leave room for the researcher to not only interview participants but also to attend different meetings and to visit all the installations. The advantage of the case study was that all participants were able to share their different visions and experiences throughout the liberation

process, which made it possible to understand how each individual had different perceptions and understandings even if they worked in the same shop.

3.2.3 Questionnaire

The questionnaire for the semi-structured interviews (see Appendix C) was developed to cover the main objectives of the study: understanding the process of liberation management within the metal transformation plant, the advantages, obstacles, and limitations of this type of work culture and the possible links to Self-Determination Theory. Although the theory was not specifically identified or explained, the goal was to understand the context and the lived experiences and then to try and link them later with the three components of the Self-Determination Theory: autonomy, competency and relatedness. Below is an overview of the questionnaire, divided into four sections:

Table 3.1 Questionnaire overview

Level of inquiry	Timeframe	Aim	Content	Question sample
Macro	Past and present	Understand how the person sees the change in its macro context	The description of the transformation with its impact on people and the business	Can you describe the major changes that have been going on in the last 2 years within the organisation?
Macro	Future	Understand how the person sees the situation evolve	Description of next steps with regards to the liberation process	What are some of the things that the organization could do to ensure the continuity (or not) of this liberation process?
Micro	Present	Understand the personal feeling and thinking of each worker towards the liberation process	The lived experience of each individual	How has this transformation personally impacted you?
Micro	Past	Explore the learning and unlearning experience that took place	What had to be learned and unlearned through the process	What are some changes that you had to make to be able to function in this type of work environment?

3.2.4 Exploratory and explanatory lens

Since the links between liberation management and Self-Determination Theory have not been studied in depth and very few authors in management have taken interest in the connection between these two notions, it was preferable to conduct this study through the exploratory and explanatory lens (Marschall & Roseman, 2011). By doing so, it would allow for a deeper comprehension of the phenomenon and an open mind to the different elements that could surface throughout the research project.

3.3 Context

3.3.1 Ethical approval

Since the study required an ethical approval (see appendix D), the purpose of the project as well as the interview protocol and research design were described and submitted to the ethical board of the University of Ottawa and approval was obtained with few minor modifications. Also, all participants signed a consent form before each interview and kept a copy, along with the researcher's email address if they needed to ask or comment on anything after the interview was over.

3.3.2 Background for the Study

The current study took place in a manufacturing plant in the province of Quebec. For anonymity reasons, the name of the company as well as the participants' identifications have been modified. Although liberation management has been studied in different contexts (Getz, 2009; Weil & Dubey, 2020; Verrier & Bourgeois, 2016), it has been mainly done in Europe and the United States and often with leadership as an overarching theme, giving voice more particularly to the CEO (Verrier & Bourgeois, 2016; Mattelin-Pierrard et al., 2018). The opportunity to understand liberation management from the shop floor, with the perspective of manufacturer workers, and with a link to a Self-Determination Theory was an opportunity to explore new areas of research.

A contact was made with a business that was undergoing the liberation process and the idea of having a researcher inside the company was presented to staff from all different departments during one of their morning meetings and was accepted without any resistance.

As a family-owned business, Metal Direct is a plant that employs over 75 people and is located in a small village in the Chaudière-Appalaches region in the Province of Quebec. Active for more than 25 years, the company was held by family members until one member decided to acquire all its shares. As the sole owner, B. Caron is now the only

owner and until recently was playing an active role within the business. On the shop floor, most workers are men aged anywhere from 20 to 65 (one man is approaching 75 and comes in every day to work), and they perform manual tasks: cutting metal pieces, welding, painting, etc. Some have training for specific trades and others have been trained by the company in-house. There are day shifts and night shifts and the shop is always closed on weekends.

The office staff is composed of five people working mainly on their computers to manage the orders, estimate the jobs, plan the production and drawing plans to maximize the utilization of the machinery. These employees are aged between 25 and 55, and the team includes three women.

The coordination team is composed of 11 people, including organizational and production coaches, project coordinators, programming experts and night-shift coordinator. One person is also part of the coordination team during specific projects.

Finally, the administration team is composed of five people taking care of finances, legal matters, accounting and “human resources” (called differently in the liberated enterprise context).

Metal Direct’s client base is mainly other manufacturing businesses and most of their projects are industrial subcontracts. Being part of a chain, their work consists of transforming pieces of metal then shipping it to another business which means they will not see the end product of their work.

The normal workweek is of 40 hours, often done in 4 days for the shop workers and in 4,5 for the office ones.

The liberation process came in early 2017, when Mr. Caron, the owner, facing difficult decisions came to realize that he was not going the direction he longed. During the interview for the study, he explained how he had lost himself in the process of “managing his business” and wanted to make a radical shift. After speaking to an entrepreneur colleague during a weekend retreat, she had shared with him how she had “freed” her employees and how beneficial it was on all levels. Mr. Caron decided then that it was the solution for his own business. At the end of the summer of 2016, he started to reflect on how to go about it and was reading and watching videos on the subject of liberation management. He then informed a few people in the plant to make sure they would be on board. In January, a companywide meeting was organized in a community rental space and Mr. Caron shared his vision with everyone. It was the beginning of a long journey, that turned out to have an overall positive impact but not without hurt. The first signs of control were abolished, like punch cards and the break bell that would announce when to come in and out. The workers were asked to step in as the operations director left and the decision was not to replace him. Organizational coaches were introduced (individuals already working in the company but with different roles.) Titles were abandoned and monthly meetings were introduced as well as morning kick-offs, to encourage dialogue about company’s goals but also about the liberation culture in general. Liberation management consultants came in a few times, to help guide the liberation process since it was new for everyone. To this day, the process is still ongoing. Most people will talk about LM as a work-in-progress along with the ups and downs.

3.3.3 Participants

A few weeks prior to the researcher’s visit, an invitation was made during the morning meeting and a poster was also placed on the informal business community board. The research goals were explained, and people were asked to sign up on a sheet for an interview slot that would last between 30 to 60 minutes. All employees would be paid during that time and although no pressure was put on employees, it was encouraged

that people from all sectors and with different experiences participate in order to encourage a mix of stories and opinions. No pressure was made on employees to participate, and a total of 18 people accepted the invitation to be interviewed. All of them coming from different sectors of the business from night and day shifts, a mix of new employees and old ones and a ratio of women like that of the business. See table below for details. (For simplicity purpose, the years passed in the company were counted as the number of years within the Metal Direct environment, since the company had other branches and later closed them, people still saw themselves as serving the same business over the years).

Table 3.2 Table of participants

Participants	Name	Gender	Age group	Type of work	# years of at the company
1.	Shayne	M	25-35	Manual (night)	3 months
2.	Bertrand	M	45-55	Manual	12 years
3.	Jeff	M	25-35	Manual	5 years
4.	Joe	M	25-35	Manual	10 years
5.	Kathy	F	55-65	Manual	10 years
6.	Bill	M	45-55	Manual	32 years
7.	Luke	M	45-55	Manual	2 years
8.	Justin	M	45-55	Manual	5 years
9.	Cynthia	F	35-45	Coordination	5 years
10.	Colin	M	35-45	Coordination	4 years
11.	Colbert	M	35-45	Coordination	8 years
12.	Jack	M	55-65	Coordination	1 year
13.	Chris	M	35-45	Coordination	2 years
14.	Peter	M	45-55	Office	15 years
15.	Carmen	F	25-35	Office	4 years
16.	Sam	M	25-35	Office	5 years
17.	Lionel	M	45-55	Office	3 years
18.	Mark	M	55-65	Office	20 years

Note: names have been changed to preserve anonymity

3.4 Data Collection

3.4.1 Sampling strategy

As the purpose of the research project was to explore the liberated process and to make links with Self-Determination Theory, it seemed relevant to study the phenomena directly and to find an organization that would be interested in letting a researcher come in and get access to their reality. The sample was not chosen for probability reasons but rather as a purposeful sample (Creswell, 2013). A direct contact between the researcher and a member of Metal Direct firm made the project possible and the access was granted without any resistance nor difficulty. The initial goal was to have at least 8 to 12 participants but in the end, 18 participants accepted to be part of the study. They were asked to write their names down on a sign-up sheet and others were asked on a voluntary basis, by the person in charge of human development. The intention was to encourage a diversity of opinions and experiences and to have a mix of people coming from different departments, with all levels of seniority, male and female.

3.4.2 Interviews

As recommended by Patton (2002), the interview process was approached with reverence. The interview guide (see appendix C) was precise, short and not too conceptual to ensure that the discussion would be fluid and as natural as possible. Some questions and language had to be adjusted to fit the context and to make sure participants felt at ease (Patton, 2002). Interviews were held with 18 people and lasted between 30 minutes to an hour, averaging 45 minutes. The meetings took place in a close and private office space and were done during paid working hours. All interviews were recorded and transcribed resulting in 12 hours of recording, 378 pages of transcripts and more than 135 000 words. Field notes were taken during the interview but mostly afterwards, to ensure that participants felt comfortable and that the interview looked more like a discussion rather than a data collection procedure.

3.4.3 Observations

Observations were also part of the study, which would add a perspective to the data collected through the interviews. As Hennink et al. (2011) state, when people talk about their experience during an interview, they may adjust their description of their behavior for example, while observations can enable the researcher to observe firsthand what people actually “do”. The observation process gives an opportunity for the researcher to look directly into the situation and may enhance the understanding of different actions or situations and bring more context or perspective to the data. In a timeframe of about two years, during three different visits, it was possible to be present in meetings of various kinds: morning kick-off, financial inter-sectorial meeting, a “walk through the spaces” (Hennink et al., 2011) of the whole plant, conflict resolution meeting and liberation management follow up event with a total of approximately 30 hours of nonparticipant observation.

3.4.4 Corporate documentation

As well as interviews and observations, other sources of information were used to enrich the understanding of the process of liberation. The company had produced a draft of the liberated enterprise manual and gave the researcher a hard copy. Also, the all-company event that took place to follow up on the liberation strategy was held within the time of the research project. The extensive notes and all documents for that event were made accessible as well.

3.5 Analysis

3.5.1 Content Analysis

The data collection was done using different tools: semi-structured interviews, non-participant observations and document analysis. As mentioned earlier, interviews were recorded and transcribed. Therefore, the data collected consisted mainly of written interviews and notes taken from observations and document analysis. The software

NVivo was used to make sense of the data produced (mainly the interviews transcripts) and to uncover links and themes that were relevant to the research questions. The notes were used as part of a triangulation exercise (Creswell, 2013; Miles et al., 2014) to enrich the understanding using more than one source.

3.5.2 Trustworthiness of the research

While doing qualitative research to answer questions like *why*, *how* or *what* (Myers, 2013; Marshall & Rossman 2011), the criteria for establishing the rigor of the research differ from the validity and reliability of quantitative data. Yet, the objective of quality and pertinence of the research remain. The use of the criteria of credibility, confirmability, transferability and dependability (Lincoln & Guba, 1985; Shenton, 2004; Savoie-Zajc, 2019) served as guidelines to evaluate the trustworthiness of this thesis. Below is a table using these criteria, along with their meaning (Hanson et al., 2019) and how they have been met within the present study.

Figure 3.1 Trustworthiness of the research

	Meaning	How it was achieved within this research
Credibility	Comprehensive, trustworthy, and sensible explanations of the data	Members check-in (follow-up with participants: phone conversations, emails) Several data type triangulations (interviews, observation, documentation)
Confirmability	Findings and interpretations that reflect the view of participants	Verbatim transcription of interviews Note taking Acknowledgement of study limitation
Transferability	Relevance of concepts and findings to other settings	Detailed description of the context and methodology
Dependability	Coherence between methods and findings, and transparency and auditable research process	Processes described in detail Purposive sampling Respect of participants confidentiality Archives of data

Criteria by Lincoln & Guba (1985), meaning by Hanson et al. 2019

3.5.3 Coding

The primary coding strategy used for this research was a combination of deductive and inductive approaches (Hennink et al., 2011). The semi-directed interview questionnaires

were built to give freedom to the participants to express their views of the transformation but also to try to identify key issues related to competency, autonomy and relatedness, the components used in the Self-Determination Theory. The first codes were descriptive, derived from the interview protocol and were related to SDT and LE. (Miles et al., 2014). Going through the data initially, mainly the first 5 interviews, a first cycle of coding was done using the deductive codes. Then, during the analysis, other codes emerged, inductive this time, and were used to bring depth and authenticity to the analysis. The interviews were then revised to include the inductive coding. The rest of the interviews were analyzed through this set of inductive and deductive codes.

In the meantime, during the first cycle of coding, larger themes emerged (Miles et al., 2014) and patterns were detected. These patterns were noted and the final list of these themes and patterns was extended after the first cycle of coding was done. The process was also inspired by the Gioia method (Corley & Gioia, 2004).

3.5.4 Codebook

The codebook exported from NVivo is included (see Appendix A), with description of codes and examples for each.

3.5.5 Conclusion

This qualitative research was built using the case study methodology, to ensure in-depth exploration of the phenomena (Myers, 2003; Marshall & Rossman 2011). A total of 18 semi-directed interviews were conducted with close to 30 hours of nonparticipant observation and documentation analysis. Trustworthiness was reinforced through different study features like members' check, detailed context, interview transcripts and data triangulation. Although this type of process has its limitations (addressed in the last chapter), it allows a unique posture for the researcher, to be admitted in sharing in the reality of the participants and to listen, name and observe their experiences. In chapter 4, the results will be presented, and the discussion will follow in chapter 5.

Chapter 4 : Results

4.1 Introduction

This section exposes the results of this qualitative study, built using different data sources such as nonparticipant observation, semi-directed interviews and documentation analysis. As explained in the introduction of this thesis, the aim for the research project was:

1. To explore the experience of workers going through the process of liberation within their work environment;
2. To understand the advantages, expectations, obstacles and limitations brought by the liberation culture;
3. To observe any possible links between Self-Determination Theory and the liberated enterprise.

Therefore, the results presented in this chapter were obtained through coding the empirical data, analyzing the links, concepts and patterns that emerged over the months throughout this research. The quotes are all translated by the author from the original French interviews.

4.2 Key elements

The experience of liberation is filled with moments of excitement, doubts, frustrations, gratefulness and hope. It is lived in a particular way for each individual and advantages perceived by some can be seen as threats by others. In the next figure are key elements that can summarize the advantages, expectations, obstacles and limitations of LE as lived within Metal Direct.

Figure 4.1 Summary of findings

Advantages	Obstacles
Sense of freedom Sense of purpose Sense of belonging Performance Well-being	Uncertainty Fear Ambiguity on new roles (invisible pyramid) Information asymmetry
Expectations	Limitations
Need for coherence Trust as a foundation Clear communication Transparency	Freedom v/s need for rules and clarity Learning new behaviors v/s unlearning old ways Collaboration v/s healthy confrontation

4.2.1 Advantages

The advantages of the liberation culture could be seen on all levels. Individually, this type of organisational form gave each person a sense of freedom and the ability to make decisions and take action and it also gave a deeper meaning to the work performed. From a collective angle, for departments and the organization as a whole, LM brought more collaboration and greater participation between teams as well financial performance and a general sense of well-being. Below the key advantages are presented as brought forward by the participants.

a) *Sense of freedom*

During conversations with participants, when the liberation process was evoked, one of the first words that came to mind was freedom or *having a sense of freedom*. Indeed, there is great flexibility and space for people to make decisions, to try things, to suggest ideas, etc. In French, LE is called *Entreprise libérée* which directly refers to the word *libre*, which means free. This specific feature of LM brings people to be more involved

and engaged in their work and to discover their colleagues and appreciate their competencies and talents. The feeling of freedom was associated with a positive impact on both the individual and the team level.

*The greatest advantage is the feeling of freedom... [...] It's the feeling of, when you work, you know, you work well and you value what you are doing because you are doing it with autonomy.
(Peter, office worker)*

*I think it allows everyone to be fulfilled, there are a lot of people that we are discovering because of this type of liberation culture. They come out and talk about their ideas and they sense they have the freedom to do so. That's very fun, we are discovering people! "I didn't know you were good at doing this!" It's very pleasant.
(Justin, manual worker)*

b) *Sense of purpose*

Working with greater autonomy brings other positive consequences for employees. Being able to be heard and to embark freely on new projects can inspire a deeper sense of purpose as some participants explained. The fact that workers can grow, to be themselves and to take part in challenging projects was mentioned as a great benefit of LE.

*That feeling... that feeling of accomplishing something and to say "yes, it worked!". There is more room for the development of people here. We need to be people before robots you know, otherwise we're going to lose ourselves, we'll lose our humanity.
(Bertrand, manual worker)*

*Yes, there is pride in the work we do. That's so important! It needs to happen, there needs to be a feeling of accomplishment because otherwise you come and get a paycheck and go home and you think "well, it doesn't matter". But in the end, that doesn't work.
(Jack, coordination worker)*

*People are here to accomplish something greater; they aren't here to clock in and out. So you have access to the whole person, not just a "human resource", you have access to a person who has a heart for the business and that also desire to be proud of the work she does.
(Colbert, coordination worker)*

c) *Sense of belonging*

Another advantage central to LE is the relationships between members of each team and particularly in-between business sectors. It is not unusual to have people that come to help another team even if it's not *their job* to do so. Having the information passed along during morning kick-off, where representants of each sectors attend, gave a better understanding of the work needed to be accomplished and gave people a common vision. Based on trust but also on distributed information, good relationships was mentioned by many participants as an advantage of LM.

*We are more than colleagues, we are friends too, we are a tight team. We work together and try not to give each other trouble. We have something between us that is more than just being colleagues.
(Jeff, manual worker)*

*Because of being in a team, we are often close to our team. In our department, people know each other, they work together all day long. Within the team, you develop affinities and connections to your group.
(Bill, manual worker)*

d) *Financial performance*

Many questions in the interviews were related to the impact, directly or indirectly, of the liberation process. While two people from the administration (office) did mention that the financial results were outstanding, most participants did not talk about the financial aspect during the conversation. The focus of the whole liberation process did not seem to be about this kind of performance, and yet the record financial performance appeared as a by-product of the liberation process was evident. In the last two financial years, the company hit historical financial records, with the highest margins and overall business revenue. While having a healthy financial situation was important, the idea that the company *had to grow* was balanced with the view that it needed to remain efficient and human.

*Our numbers keep growing, it is going better than before and it keeps going. We are doing something right I guess...
(Joe, manual worker)*

We don't necessarily need to grow our numbers. We did have the biggest numbers in the last couple years. Yes, we want to be more efficient, more profitable. But we also need to be aligned with our values.
(Colbert, office worker)

e) *Well-being*

In most interviews, participants talked about the overall positive climate of the business, the trust in relationships and the notion that most people enjoyed working in that environment even if it was not always easy. Some participants shared their appreciation with great enthusiasm and were convinced that this new way of working was now the *only* way possible. The feeling of well-being was mentioned in many ways, but the notion of collaboration and good relationships seemed to be a recurring theme.

There is a real spirit here, a team spirit, something authentic. It's not always easy. But fundamentally, there is a deep respect for people. There is a strong desire that people would be well, would be happy.
(Lionel, office worker)

Even if it's sometimes a bit rocky, at the end of the day, everyone here is happy. Those that weren't comfortable with this new way slowly left the boat. But people that wanted to grow with this new model have done so.
(Sam, office worker)

4.2.2 Obstacles

While advantages like good relationships, freedom, well-being and financial performance are major advancements for Metal Direct, LM has also faced many obstacles along the way and continues to do so. The whole process is quite challenging and brings to light some weaknesses that can sometime overshadow all the positive impacts mentioned earlier. Among the obstacles, participants talked about uncertainty and fear, role ambiguity, and communication. Below is a short summary of those obstacles.

a) *Uncertainty*

Since Metal Direct's transformation is unusual and not common in Quebec nor in a manufacturing setting, it could bring certain doubts about what the future holds. Many participants didn't think that LM was as strong as it used to be, and they were not sure of what the next steps would be as far as this new organizational form goes. Some workers felt overwhelmed by the process while others thought it was not going far enough. A main concern was how it was going to be lived out in the next months and years since some workers thought that the control was starting to get back between the hands of a small number of people.

I don't know where all this is going, what is the stage we are in. [...] And what are the objectives of the people that wanted to implement this? And where they want to go, I don't know.

(Cynthia, coordination worker)

I think that we are coming back to some of the old ways and some people making too many decisions. I think it's very fragile, all of this. I am not sure where we are going.

(Justin, floor worker)

b) *Fear*

It is not uncommon for people to be impacted by fear especially in new situations. In Metal Direct's transformation, the initial fear was the survival of the business and the overall questioning if the model would enable the firm to perform. Since numbers were shared on a regular basis, workers started to see that LM could make operations smoother and more profitable. Then after freedom was established and proven efficient, the fear was about the idea that it could be taken away. There was also the fear of other people abusing their new freedom (for example, taking advantage of the fact that there were no more employee punch clock).

It is good to have freedom but there is also a price to pay. I often fear that people will abuse it. And they do, too often. I have seen it many times, it drives me nuts.

(Cynthia, floor worker)

*I am not sure if we are going in the right direction. Some people start acting like it is not a liberated enterprise anymore. This whole thing is so fragile, we have to be careful moving forward.
(Bertrand, manual worker)*

c) *Ambiguity on new roles*

Within the liberation process as mentioned earlier, if hierarchy is not altogether absent, it is kept to a minimum. In the case of Metal Direct, there were no formal hierarchy levels, yet a few key people, the coaches, had to play a strategic role and the owner of the company continued to be the sole owner. Other workers attended different planning meetings also (for HR development or infrastructure projects for example). Therefore, something like an invisible pyramid¹, a tacit informal structure seemed to be taking place as participants mentioned (Mélo, 2019).

*We are not supposed to have bosses, but really, we know who they are.
(Kathy, manual worker)*

*There are shop directors, like I say that we are not supposed to have them. That role is not supposed to exist. But because of certain circumstances, because of misunderstanding on the level of involvement, some have not understood, we had to take a step back.
(Justin, manual worker)*

*At the end of the day.. if you had a title on your shirt that said "operations director", you did take off your shirt, but you still have the same role.
(Bill, manual worker)*

Participants explained that informally there were no more titles but that they knew some people were *in charge* or made decisions as a boss would. This could be because the process of liberation is new and not that common in the industry, so the reference points are rare if non-existent. Also, the consultants that came to help in at the beginning of the process did not follow-up in the long term which seems to have left Metal Direct to figure things out on their own.

¹ The term was heard in a Semco Style Institute webinar, March 2021

Finally, the temptation to fall back on what is known i.e., a boss with followers, could explain why certain people took charge to give some clarity and to ensure things would go in the right direction.

d) *Communication*

Liberation management started with the owner desiring a major change and after months of reflections and a few informal conversations, a company-wide meeting was held to explain what was about to happen. The company would be *liberated* and people would be trusted as capable and mature adults. Morning kick-offs were introduced with participants from all over the organization to ensure that the information was communicated efficiently and on a regular basis. Monthly meetings were also introduced to address organisational issues. Despite a strong desire to communicate and to inform people, many interviewees talked about the lack of communication, the need for more clarity in communication.

Yes, communication, for sure, it's not smooth and it's something we are working on very hard and it is not easy.

(Carmen, office worker)

There are a lot of things, how could I say that... There are things that are put in place without consultation. Often committees do things without us knowing... We are not very aware of what's going on.. [...] What would it take for the process to continue well? I would say, a bit more organization, and communication, I think.

(Peter, office worker)

4.2.3 Limitations

The obstacles mentioned above are more related to issues that people face daily and that are short term. Limitations are more inherent to the nature of the process and will probably need to be *lived with* as part of the liberation reality. They could also appear like contradictions. For example, the freedom experienced by workers brings a strong

desire for clear rules and processes to avoid chaos and to ensure that freedom is lived out as a positive experience. Along the same lines, learning new ways of working also means that certain beliefs and behaviors need to be *unlearned*. Finally, the advantage of having good relationships need to be balanced by the ability to confront and to grow as an individual and as a team. A short summary of these elements follows.

a) *Freedom and the need for rules*

As seen earlier, the sense of freedom is one of the key advantages of this new way of working. People can take on projects, make decisions on what machines they need to do their work or which people they should hire. Yet, there was also a great emphasis put on the importance of playing by the rules... It is important for people to be free and at the same time, to know what the parameters are. The need for clear rules and processes was expressed by many participants.

*There are rules that we need to respect. We have clients to serve. And since there are clients to serve, that means that we all need to take our responsibilities and we can't be saying "I don't like to do this", it doesn't work that way. There is a misunderstanding, I think, about what it means to be liberated. Liberated doesn't mean you do what you want and you come in at the time you want.
(Jack, coordination worker)*

*We are a team, we work together and we decided the rules we needed to put in place so that everything would go well and so that people could work well together.
(Bertrand, manual worker)*

b) *Learning new behaviors v/s unlearning old ways of doing things*

At Metal Direct, the liberation transformation was done within a few months and people all had to adjust to this new way of working. For some, it meant reconsidering long-time beliefs about *asking the boss what to do* for example. The learning curve was different for each person, and some participants were very aware that the resistance they had was based on the notion that they were leaning back on their *old ways* too often.

*But there is a part where you need to unlearn, where the worker, if he is not confronted to his limitations, to what he is not able to do, he won't grow. Just to recognize that you "can't do something" is the path for real learning I think.
(Colin, coordination worker)*

*I am from the old school... How can I say that? I have habits and ways that I deal with things that are from the old times. I need to hold on to some of these habits sometimes.
(Luke, manual worker)*

c) Collaboration v/s healthy confrontation

Since good relationships, team spirit and camaraderie are part of Metal Direct's culture, it also brings other challenges. People are close together and are desiring to keep a certain level of peace and harmony, it can make it delicate to talk about difficult issues. Yet, it is necessary at times to be able to confront a colleague on a behavior or because a job was not done correctly. The positive climate and overall friendly atmosphere can come in the way of healthy confrontations.

*Sometimes, well, we are not acting in a rational way. The whole emotional side kicks in. Because we are all friends. So, we are all in the same gang, we work alongside each other... It becomes hard to go and talk to someone and tell him that he has been slacking.
(Colin, coordination worker)*

*There are no consequences, or almost none. Sometimes, we talk, you know... One of the biggest problems, it's that we work a lot together. So, all of these people have good relationships, like friends. So when someone is not doing a good job, we talk about it but we don't really address it with the person...
(Justin, manual worker)*

4.2.4 Expectations

The advantages, obstacles and limitations are all part of the liberation story. The realities that workers experience daily can bring both frustration and joy. Yet, what seems to be an underlying belief is that it is not an easy road, but it is one worth walking on. The liberation transformation has awakened and shaken workers and many have

spoken about their desire to see it go further and to invest more time communicating about it and ensuring that people have the necessary competencies (social and behavioral) to keep the model alive. Indeed, the expectations are high and people are calling for more coherence, they expect trust to continue to be at the center and they are asking for more communication and transparency. This next section covers these elements.

a) *Need for coherence*

One main element that would surface in most conversations was the longing for workers that the liberation *would work* and that efforts and resources should be invested for this liberation process to succeed. Although the solutions or strategies that would enable a *better liberation* could not always be identified clearly, the desire for this new culture to really be deployed with coherence and transparency was very present. Most participants had high expectations, which could explain why some workers thought the process was not going far enough or was not happening fast enough.

How to know how to move forward in the liberation process? If we never talk about it, if we don't discuss it?! We need to know how to talk about the real things, to be brave in that. It's easy to always stay comfortable and not wanting to rock the boat because we want to please everyone... But if we don't dare anything, we won't move forward. (Justin, manual worker)

At the moment, the liberation, it could go better! At first, we could see, we could totally see the changes, we could see our progression. But now, we're stuck, we are not moving forward. (Joe, manual worker)

When I have heard for the first time during this process that we would be sharing the profits, well, I have heard it recently. Before, it was not part of the equation. But now, I think that the model needs to progress too. And I think there are expectations on that end too. (Lionel, office worker)

b) *Trust as a foundation*

Since trust has been shown to have positive impact within firms (Shockley-Zalabak et al., 2000; Gustafsson et al., 2020; Adler, 2001), the fact that most participants put trust at the heart of Metal Direct liberation process is revealing. The notion of trust was put forward on many occasions by people no matter their roles. Trust was mentioned as the source of a healthier work climate, a facilitator for collaboration with others and as a compass for strategies. It was also widely exposed on the corporate training document titled *managing by trust*, a tool developed to share the company's visions and values.

*The atmosphere here is calm, there is a form of trust that you can feel, it's reassuring to know that you are respected as a human being.
(Shayne, manual worker)*

*In what we do, no matter our directions or strategies, trust needs to be at the heart.
(Mark, administration worker)*

*The biggest advantage of all this is the trust, trust that has been established here.
(Kathy, manual worker)*

c) *Clear communication*

As mentioned earlier, many efforts were made to communicate as much as possible. Even if many new communication strategies were introduced, there seems to be high expectations on better communication although when participants were reminded of the morning kick-offs, the monthly meeting, the open books, etc., they were not able to identify what the problems were, but the communication aspect was mentioned on many occasions as an ongoing challenge.

*I think that every time we talk about what is not working and what needs to happen here, it's often the communication element that's mentioned first.
(Justin, manual worker)*

*I think to make things better, we need more organization and communication. More communication between departments.
(Peter, office worker)*

d) *Transparency*

Along the same line as communication, the need for transparency is also very present. Workers want to be informed of the decisions and the processes leading to them also. Since the liberation is strongly based on autonomy, it is also expected that people will have access to information to make decisions. The expectations, once again, are high and when the organization fails, disappointment follows.

At one point I wanted to attend a specific meeting since I was still new here. Well, they told me that I was not ready for that or that it did not concern me or comments along those lines. So, that's the part of the liberation management that I don't get. If we are free, if we say transparency is key, why can't I go to that meeting to try to understand the company better?

(Chris, coordination worker)

We need to be informed about things. It's supposed to be liberated but sometimes big decisions happen, and we are not aware of them, and we haven't been consulted either. We have high expectations! Otherwise, we get very disappointed.

(Carmen, office worker)

4.2.5 The role of autonomy, competency and relatedness

In many conversations on what the LE was about, an essential and focal point was the role of autonomy. It seemed obvious and clear to most participants that the concept of autonomy is at the heart of the liberated culture. The two other components of SDT, competency and relatedness, were also mentioned in the interviews and could be observed through the other data collection methods.

For example, for the competency part, in the document analysis and in informal communications during the observation phase, it was mentioned that a survey of all employees had been done to map out what the strengths of everyone were and how they were being used within the business. There was also a whole session held with the office members, where each one had to talk about their roles, interests and talents and

chose a fictional character that would represent them. Then, in the everyday task distribution, the idea was to try to match as much as possible those competencies with the jobs to get done. Finally, a person was hired to care specially for the human development within the plant and to take on the project of meeting each employee and ensure that they had an opportunity to talk about their goals and desires for their own development in the business. Some respondents also shared about their development plans, like going back to school, and how Metal Direct was supporting them in developing new skills.

As far as relatedness, this notion of belonging and a feeling of togetherness, it was also addressed. Words like collaboration and trust were central to many interviews and the fact that the *silos* mentality had faded during the liberation process was also an indication that a collective spirit is present. Most people talked also about a good ambiance at work and that they enjoyed their colleagues, some would refer to them as friends. The ambiance during meetings was also lighthearted, people making jokes with each other, etc.

“We like working together you know, it’s like a group of friends. After our shift on Thursday night, we all go out to have a drink together.”
(Jeff, manual worker)

There is a good emotional bond between people here.
(Mark, office worker)

4.2.6 Summary and remaining gaps

Overall, liberation at Metal Direct was grounded in trust and brought a sense of freedom and better collaboration which resulted in stronger financial performance and worker’s talking positively about their work experience. Many participants would like communication to be more open and transparent and there is a need for more clarity about people’s jobs and responsibilities. Expectations are high since workers want liberation to work and it can seem like a slow process at times. Since no official training

has been offered thus far, many people lack soft skills that could facilitate the liberation process, like conflict resolution competencies.

Also, the understanding of LE is different for everyone, some have felt a major transformation and others say that their work has not been any different. Adjustments are made on a regular basis throughout the organization which means that people are constantly adapting themselves. Decisions and planning are made with as many people as possible yet there seems to be a desire for strategic decisions to be shared more collectively but the ability to see the bigger picture is necessary and some participants believe that it is not possible for everyone to understand the global vision.

Liberation management is a collective process, but it is first lived within each individual, and it seems like it is more suited for certain personalities. Some will speak louder than others and others won't voice their idea unless asked and that can weaken the liberation since some diversity of opinions can be lost. Finally, the whole process appears as a natural way to function and the fact that no training was offered seems to confirm that. Yet, although allowing people to make decision and respecting each person as equal human beings seem like common sense, it takes time and training. This part of preparation and nurturing the liberation process seems to have been underestimated.

The findings show that liberation process is linked to SDT yet, the theory itself is not sufficient to grasp the complexity of the phenomena. The paradox perspective helps bring light to the findings by identifying the tensions created within the transformation. The next chapter will present a discussion as well as a conceptual model based on the findings of this research to try to establish links between the data, literature and SDT and the paradox perspective.

Chapter 5 : Discussion

5.1 Introduction

This research project had the intention of exploring the experience of LE and to make links with a well-known theory, namely SDT. Although the links are there, a lot of questions remain. Yet, it is also pertinent to shed light on a few key elements to bring the discussion further.

5.1.1 Overall Understanding of the liberation process

a) *Tensions*

One of the main tensions seen within the data could be represented by the word *asymmetry*, an overarching theme of the research. The understanding of the concept of the liberated enterprise was clearly an example of this. Some interviewees saw that transformation as a major component of the business culture, others didn't. There were also disparities with the notion of engagement as some thought that most people were on board with this new vision, others thought that half of the team did not really care about the transformation (Holtz, 2017). There was also asymmetry between the level of competencies, especially in soft skills, needed for LM to succeed and the low level of training involved to gain those competencies. Finally, there was also asymmetry in the information given to people. Some were aware of how the business was doing financially, what the new projects were about, which new markets would be tested, etc. Others, even though a monthly meeting is held to share all that information, were oblivious to the numbers, the markets, etc., and even mentioned that they wish the company would be more transparent about that. In sum, the asymmetry in information, level of engagement and competencies are creating tensions within the organization. There are also contrasting realities that surface within LM and can, as the asymmetry, create tensions. The notion of freedom for example, is also linked to the need and necessity for clear rules and processes. These concepts can be seen as competing ideas

yet the challenge, as seen through a paradox perspective, is to learn to embrace these conflicting notions.

b) *Possible solutions and pitfalls*

As mentioned before, a major element of the success or failure of the liberation process has been related to two elements: training and communication (Chabanet et al., 2017; Gilbert et al., 2018). Efforts had been made by Metal Direct to enhance the communication channels: daily morning kick-offs, monthly all-employees meeting, coaches that would reach out to workers as much as possible, open-door policy with the owner, etc. Yet, although these measures were useful and pertinent, a gap was still identified in many interviews. The same held true for conflictual communication, many felt unequipped to communicate in delicate situations. It would not occur to put a worker in front of a cutting machine and to tell him or her to just go ahead and use it. It requires training, time, practice, etc. The same could be said about effective and empathetic communication, it requires training, time and practice. It needs to become an intentional objective and something that is not taken for granted. While open and transparent communication are seen as prerequisite for LM to function, the importance of training was crucial as well as trust, otherwise the process of liberation could be seen as a manipulation.

c) *Impact of LE*

Generally, most participants were content and filled with hope at the idea of having more autonomy and cultivating trusting relationships at work. The freedom and flexibility brought by the liberation process was a highlight with most interviewees. The themes of collaboration and respect were often mentioned as well as the idea that trust was deeply valued. There was also a great satisfaction linked to the meaning of the work, it was not about clocking in and out, but rather about accomplishment and a sense of pride and contributing to something greater than *a job*.

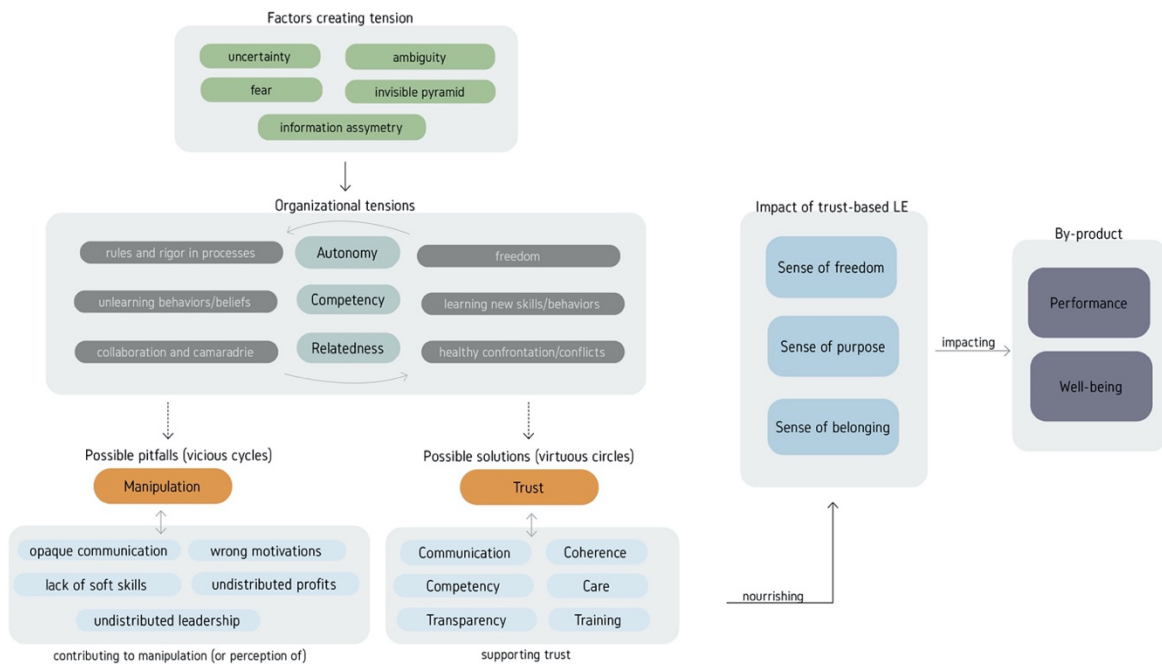
5.1.2 Advantages and Challenges

Even amid the chaos that can be generated at times with a process like the liberation enterprise, the advantages greatly surpass all the difficulties inherent to such a paradigm shift. Employees talked about their freedom, their desire to contribute, their ability to be who they are at work and to make decisions, their desire for this new culture to grow, etc. Anyone talking with the respondents would sense a deep attachment to the company and to its mission, goals and to their colleagues. Yet, it was clear that not everyone was on the same page and that the old ways were sometimes more comfortable. The importance of training, for example in communication and conflict management, would be useful to address some of the issues experienced by the participants. The whole adventure of liberation is also something that needs to be talked about regularly and openly. Many respondents were unsure as to where the process was at and even if it was still alive within the company.

5.1.3 Conceptual Model

Considering asymmetry in information and engagement and competency levels, the challenges of communication and training and the old ways that can be hard to overcome, a conceptual model emerged to try to map out the elements needed to be present and nourished in a liberation process. Below is a first attempt at illustrating the key elements of the model and an explanation to conclude this chapter. Self-Determination Theory served as a theoretical lens and the model was inspired by the paradox perspective.

Figure 5.1 Conceptual model



Source: created by author, inspired by the paradox perspective

The model is a combination of elements from the literature and from the data collected. In sum, the whole idea that the liberated enterprise would suffice and would be a new way for management is incomplete. The need to integrate conflicting realities is at the heart of the process. Below is the description of the different sections of the model.

5.1.4 Factors creating tension

First, as seen in the previous section, the liberation process has brought its share of difficulties: uncertainty about where the process is going, the ambiguity on roles and structure, the fear of people abusing the freedom, the invisible pyramid and information asymmetry. In the conceptual model, these elements are identified as **factors creating tensions** that are lived within LE. All these factors are part of the reality lived by workers and exercise a pressure on the organizational tensions.

5.1.5 Organizational tensions

At the heart of the model are the **organizational tensions** generated by the transformation. They are categorized using the three pillars of SDT: autonomy, competency and relatedness. These tensions seem to be inherent to LM and are bringing to light different contradictions or paradoxes. First, the freedom that is cherished by all workers is also accompanied by a need for clear rules, processes, and parameters. Freedom is valued but it is not about *doing what you want* nor is it about a chaotic work environment. The second set of tensions are generated by the need for people to grow and to develop new skills and competencies. Yet, this also is a source of tension since the learning that needs to take place is grounded in *unlearning* practices: *discarding of old routines to make ways for new ones, if any* (Tsang & Zahra, 2008, p.1435). As heard in the interviews, even though the liberation was overall seen as a positive change, it was hard for people to let go of *old ways* and to fit their behavior with the new reality.

Finally, the notion of relatedness, also a major advantage of LE, brings a deeper sense of connection between people and the overall work atmosphere was animated by the joy of people working together. Yet, this also brings another set of challenges in terms of communication and confrontation. To grow and to develop as a company, it is important to be able to have healthy confrontations, debates and to address delicate situation. Since harmonious relationships are at the heart of Metal Direct, it can be a trap if people are not able to share hard truths.

5.1.6 Possible pitfalls and solutions

The factors creating tension and the paradoxes that emerge from LE can lead to different outcomes: **trust** or **manipulation**. LE can be a powerful model, freedom is not enough and any actions to renew organizations must be intentionally built on trust as shown in the model (Chêne & Le Goff, 2017; Raelin, 2011). In the absence of this fundamental element, the endeavor could be seen and lived as manipulation (Jacquinot

& Pellissier-Tanon, 2015 ; Chêne & Le Goff, 2017 ; Brière, 2017). Literature has linked trust to many positive outcomes (Chêne & Le Goff, 2017).

As for the activators of trust, the interviews and literature revealed that for trust to be nourished, there is a great need to communicate better (Colle et al., 2017; Semler, 1989; Singh & Srivastava, 2016), to be aligned with the values of the organization (coherence) (Colle et al., 2017), to be open and transparent about decisions, to show empathy (care) and to develop competency (Chêne & Le Goff, 2017). This also is in line with many studies on the subject, like the concept of *psychological safety* brought by Harvard researcher Amy Edmondson (1999) and cited close to 10 000 times. According to Edmondson (1999): *trust may be an important ingredient in creating a climate of psychological safety* (p.375). Finally, the importance of training is therefore crucial to ensure that workers are equipped not only on the technical level but also regarding soft skills.

5.1.7 Impact and by-product of LE

While LE brings its share of tensions, when trust is the foundation of the whole endeavor, workers can experience strong positive benefits. Even in the presence of factors creating tensions (ambiguity, fear, uncertainty, invisible pyramid, asymmetry) and the organizational tensions themselves (freedom and rules, learning and unlearning, collaborating and confronting), when LE's foundation is trust, then a **sense of freedom, purpose and belonging** emerge. These three notions are important and were mentioned in one way or another by most participants, the sense of freedom being the most frequent term used, sense of belonging and meaning were also part of the conversations and are also essential (George et al., 2021; Mintzberg, 2008; Wrzesniewski et al., 2003). They are also related to the three pillars of SDT. In turn, it is reasonable to think that when workers are positively impacted by their work, well-being

as well as performance become natural by-products to this way of working (Sinek, 2011; Hollensbe et al., 2014).

5.1.8 Summary

The conceptual model presented is therefore an attempt at combining research findings and literature to map out how a liberation process can be maintained and seen in its globality. There seems to be a tendency for many successful authors and researchers to come up with the perfect branding, using one word to describe the organization: the fearless organization, the purposeful organization, the responsible organization, etc. Yet, it seems like more than one theory or concepts is necessary to describe the complex reality of organizations.

Liberation management is a complex and hard path to follow and yet, the benefits are evident in the case of Metal Direct: a sense of purpose, belonging and freedom which leads to well-being and performance. Self-Determination helps to understand LE through the fundamental needs of autonomy, competency and relatedness. Yet these needs, met through the liberation process, are also creating tensions within the organization.

These tensions can lead to solutions or pitfalls. For LE to succeed, this type of cultural shift needs to constantly rely on **trust** otherwise the risk for manipulation are inherent and documented by many authors (Weil & Dubey, 2020, Mélo, 2019; Brière, 2017). Trust in turn, needs to be fed through communication, coherence, care, competency, training and transparency which could be remembered as 4C + 2T. Finally, the tensions created by this new organizational form need to be seen, addressed and embraced as an opportunity to grow, learn and be resilient, as the paradox perspective suggests (Smith & Lewis, 2011; Ricciardi et al., 2016).

Now that the conceptual model has been explained, the last chapter presents the conclusion of the research project.

Chapter 6 : Conclusion

This last chapter concludes the thesis document. A brief overview of practitioner implications is presented as well as the possibilities for knowledge transfer, to ensure that the research could serve outside academia. Finally, the limitations of the research are exposed as well as the theoretical contribution to literature the need for future research.

6.1 Contribution to literature

Self-Determination theory has been a useful guide to understand major elements of the liberation management culture. It does show that autonomy, competency and relatedness are at the heart of the process and no other research has purposefully sought to link SDT and LM within an empirical study. Yet, the theory cannot explain the whole transformation. While the pillars of SDT are solid and offer strong parameters for practitioners going through LM, this study has revealed that the inclusion of the concept of *unlearning* as well as the paradox perspective can help map the whole process and give a global and more holistic view of this complex change.

6.2 Practitioner Implications

Overall, this study has revealed that workers going through a process of liberation can have very different experiences and understandings. Yet, the impact seems to be positive in general and certainly worth investigating. As the literature suggests (Getz, 2009) there is not *one way* to go through the liberation, and that may also be why the road is a bit rocky at times. Each time an organization has to write its own story and bring a new reality to life. The conceptual model developed in this research could help practitioners desiring to liberate their organizations to see the liberation experience

through a specific lens that focuses on key elements: the necessity to cultivate trust, to establish efficient communications channels, to clarify purpose, to enable unlearning and to facilitate the development of autonomy, competence and relatedness with a mindset that acknowledges and embraces paradoxes inherent within LE.

This study has also brought to light the necessity for tools and training within the liberation experience. Even if it could seem like freedom is a natural way to go about things, it does take a structure, clear guidelines and an awareness that the process will take time and new attitudes, behaviors and competencies. Therefore, it could be useful for organizations to address all these elements at the very start of the liberation process and to see training as an important part of the transformation.

In a way, the first steps of liberation may seem the easiest ones if looking at the transformation in retrospect. Getting rid of status symbols, control mechanisms, and hierarchical relationships may seem like unorthodox management, yet these measures resonate with most people on the shop floor. What is unclear and fundamental for the success of the liberation though, is how this type of culture is nourished so it can evolve and develop in a productive and healthy way. Once again, the conceptual model could serve as a guide for practitioners that would like to embrace liberation.

Liberation management is a powerful culture, but it is not enough in itself, as it needs to be structured and nurtured. **Trust** plays a central role, as seen in the conceptual model and is a reminder that it is not just about *freedom* or just about numbers. In the case of Metal Direct, performance and well-being were positive consequences of LE. Finally, the paradox perspective, which inspired the conceptual model, also sheds light on the need of welcoming contradictions and taking advantage of them.

6.3 Knowledge transfer

To make sure that this research can serve other purposes than fulfilling an academic requirement, a short and visual report will be designed and presented to Metal Direct. Many participants asked to be informed of the results for the study and the report and presentation will give them an opportunity to acknowledge the findings and to hear an outsider's perspective and hopefully could enrich their reflections and practices for the next steps forward. A shorter version of this paper will also be presented to different journals to share with the broader academic community. Lastly, presentations to targeted audiences are already planned, specifically to organizations curious and interested about changing the way they work and their overall culture.

6.4 Limitations

As is the case with all research, this project has limitations. First of all, as a qualitative endeavor this case study can inform us with in depth perspective of participants, yet since they all came from the same organization, it is a limited understanding of a liberation process that is represented and needs to be taken as such. The informants were also interested in contributing to the study since they mainly had a positive experience, there were no reluctant employees that were willing to participate. This also limits a certain view of the liberation, although it is also fair to say that many participants were able to take a critical stance of the whole process.

The fact that only one researcher took part in the study is also a limitation. Having another researcher involved in the coding of the data could help ensure the categorization and findings are less impacted by subjectivity. Also, the members check- was partially done during the study but will be more developed when presenting the findings to Metal Direct. It would have brought more credibility if participants could have corroborated the global results of the research before this paper was submitted.

Amidst these limitations, the study still brings relevant findings to light and the

conceptual model, derived from deductive and inductive elements, can serve as a guide and could be tested in future research.

6.5 Future research

As for future research, liberation management could be seen as a new way to manage and to live within organizations. Yet, could this process go too far? Can too much freedom be a risk? And also, is freedom for everyone? As one participant mentioned:

“At the end of the day, if I can say it like that, it’s like a contract. I came here, it was agreed that I would be paid a certain amount an hour for a certain type of work. Then at the end of the week, they pay me and that’s it, that’s all!” (Gaston, manual worker)

What can be asked of organizations? Some liberated enterprises have called themselves *communities* that are based on equality and trust. With a sole owner and no questions asked on the legal structure, is it really fair to talk about true equality?

In the end, if the social responsibility of the enterprise is not maximizing its profit as Friedman famously stated (1970), then is it to build a community? How far do organizations have to go or need to go and with what intentions? What is the reasonable part enterprises can play in a worker’s life? Those could be interesting areas to explore further (Holtz, 2017).

Finally, the purpose of this study was to explore a different way of management, one that is more focused on the human experience at work. Questions about the environment have not been at the forefront of the study and yet, they do need to be included in the discussion. Along these lines, the notion of permanagement has surfaced recently and is based on a vocabulary and a mindset that come from permaculture and it not only seems original but also very accurate. Could liberation management be coupled with permanagement to address both the human and the environment within a

creative and a terminology based on the natural world? Another area that could be useful to investigate.

6.6 Last words

Free them and they will work? It may not be enough. This research has shown that the freedom has to be structured well and embedded in a greater and intentional process as presented in the conceptual model. There is no *one word* model that will come and save the day. It is also important to look into the questions of liberation, freedom, equality with enthusiasm and rigor, yet to have the courage to question the business models underlying these practices as well as the well-being of our planet.

At the end of the day, research in the field of management can become more creative, inclusive of other disciplines, while remaining critical. It can also seek to be more relevant, by using different paradigms that resonate with the essence of the human experience. Doing this study was a way to illustrate other ways are possible, even if it can be hard and challenging. Liberation is not a perfect path, but it does open up new possibilities to see workers as mature and capable people. Back to McGregor, 1960.

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Appendix A Codebook

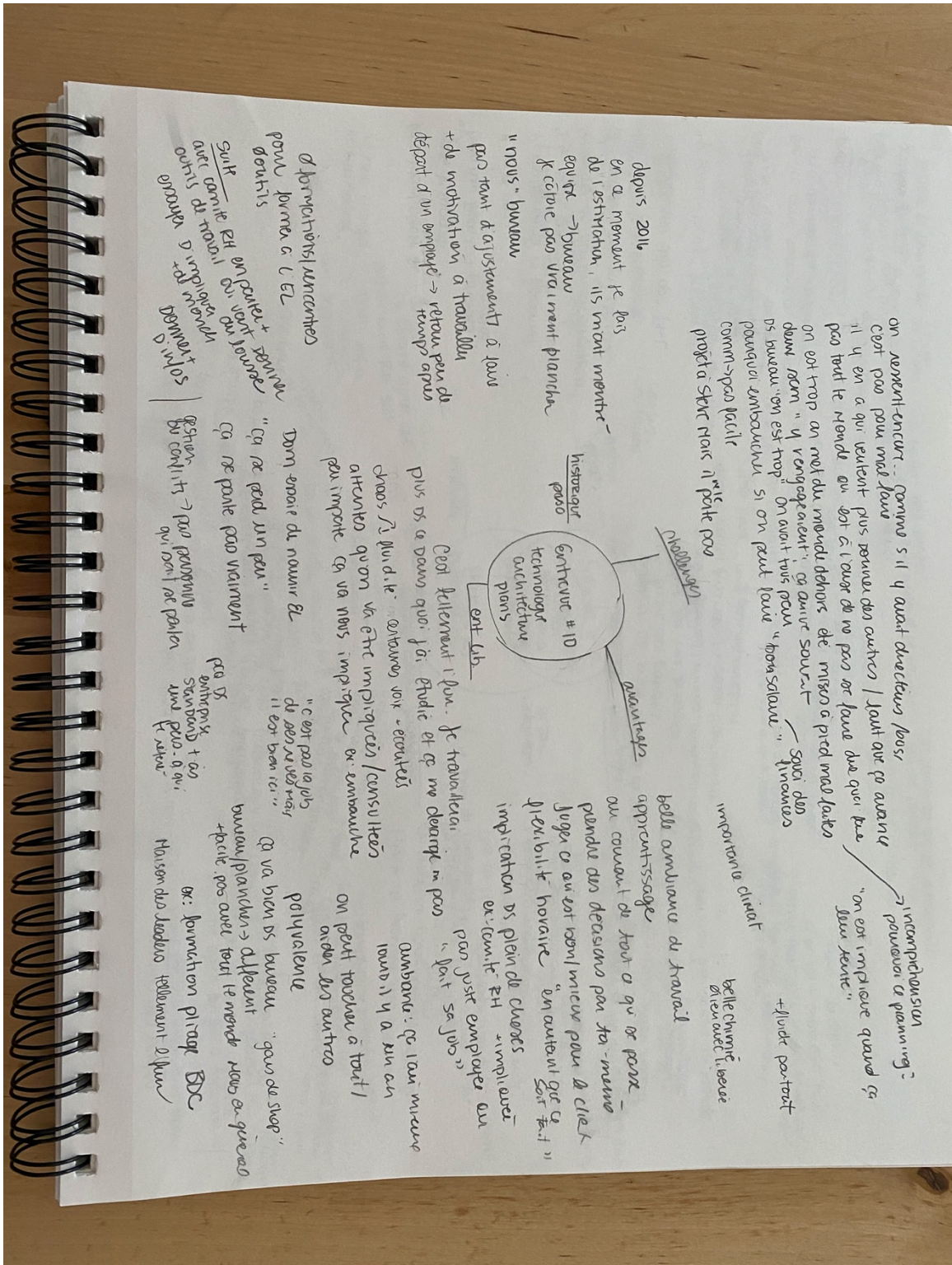
Figure 6.1 Codebook

Code	English translation	Description	Example
Analogies-métaphores	Analogies/metaphors	Refers to the use of different metaphors and analogies that describe leadership, organization culture, autonomy, etc.	"Sometimes, like we say, in a basket full of apples, I am not pointing to anybody in particular, it may be me the rotten apple. It takes only one and all will be rotten too." (Luke, worker)
Ancien modèle-culture traditionnelle	Old model/traditional organizational culture	Refers to the way people describe old reactions or paradigms or how "typical" organization model work	"It's really destabilizing. We are used to being taken care of or to have our problems solved by our manager". (Colbert, worker)
Aspect financier	Financial aspect	Refers to the financial aspect of the company: the revenues, the profits, the costs	"The fact that the business is open about its numbers each month, the revenues, ratios, etc. [...] To have numbers like that, to see this transparency, it's good". (Cynthia, worker)
Aspect personnel	Personal aspect		
Histoire personnelle	Personal story	Refers to details about the interview story that are related to personal life of the participant	"I have more than dozen years of experience but with iron. [...] I have been working in many areas, with many businesses". (Luke, worker)
Objectifs personnels	Personal goals	Refers to the interviewee's goals and objectives, professionally and personally	"I want to learn as much as possible you know. I want to show other people too, I like to show to other people what I know". (Jeff, worker)
Tâches-rôles	Tasks-roles	Refers to the tasks and roles the person has and plays within the organization	"I am like a machine operator, maybe 80% of my time. The other 20%, [...] I do some follow up" (Bertrand, worker)
Culture-valeurs-vision-croyance	Culture, values, vision, beliefs		
Croyances-mentalités-pré-existantes	Beliefs-pre-existing mentalities	Refers to the ways people "used to do things" or used to "understand things"	"You know, when you are used to have a boss that tells you that you did a good job". (Colin, worker)
Langage-leadership	Language-leadership	Refers to the use of leadership, of the way that the managing is perceived and done	"There are plant managers here, but we are not supposed to have them anymore". (Justin, worker)
Eux-nous	Us- Them	Refers to the language that talks about "management" as being separate from the rest of the workers "them v/s us"	"We have a job to perform. Like they tell us, we are supposed to know what we need to be doing". (Luke, worker)
Entreprise libérée	Liberated enterprise		
Adhésion	Engagement	Refers to how people were engaged in the process or not	"People are engaged in it... But for sure, some take what they want from it. Let's be clear. It's easier that way. But there is still a spirit around that project that is pretty strong." (Colin, worker)

Avantages	Advantages	Refers to the advantages of the liberation process	"On top of the bigger advantages, there is the one related to the machines, it is us that decided which bending press we needed" (Jeff, worker)
Climat	Climate	Refers to how the interviewee perceives the impact of LE on the climate of the organization	"There is a very good work climate here". (Luke, worker)
Compréhension du modèle libéré	Understanding of the model	Refers to the understanding (or not) of the liberation enterprise	"Already, just understanding what a liberated enterprise is, it's quite a challenge. [...] There are still a lot of misconceptions about it". (Justin, worker)
Conditions gagnantes	Winning conditions	Refers to elements that need to be present for the liberation to succeed	"People look for guidelines, they need help for everyday decisions. You know, guidelines are necessary". (Colin, worker)
Confiance	Trust	Refers to mentions of trust in the organization	"The liberated enterprise, it is about teamwork. It's based on the team and of the trust that we share". (Bill, worker)
Conflit	Conflict	Refers to the mentions of conflict within the organization	"There is less conflict. Before you know, there was always a conflict between departments. [...] Now, we talk about it, we think about our colleague that will need to complete the job, etc." (Sam, worker)
Dangers-préoccupations	Risks-preoccupations	Refers to risks and preoccupations perceived by participants concerning the liberation process/culture	"When you get something going, you have to know what you are doing, what path to take and what we are getting ourselves into. That is where we are lacking, I think". (Justin, worker)
Description du modèle	Model's description	Refers to how participants describe the model	"When I got here [...], I realized, this great freedom was sweet and at the same time, very worrisome". (Colbert, worker)
Défis actuels	Present challenges	Refers to challenges face by the organization related to the liberation culture	"The model needs to progress. People have expectations for what's coming next". (Lionel, worker)
Formation_accompagnement	Training course-coaching	Refers to any mention concerning training or coaching of participants	"I will need another year or two, or three, for training. It apparently takes about 4 years to be able to work on all pieces" (Shayne, worker)
Le client	The client	Refers to comments regarding the client	"The day that you come to work and you are not in the best mood, well, there might be a client that is waiting for his order, and a client, well, he is not obliged to buy his products here". (Jack, worker)
Les débuts	The Beginnings	Refers to the beginning of the liberation process	"It was like a honeymoon at first you know, [...] like we are freed from our chains." (Bertrand, worker)
Objectifs	Objectives	Refers to the objectives of liberation	"We should be looking at the overall jobs that need to be done, instead of thinking about "I did my 40 hours this week so I am done". (Joe, worker)
Reconnaissance	Appreciation	Refers to the appreciation of employees	"When the time came for employee evaluation, it was natural that they would not be held like they used to. So, we decided to have appreciation circles instead". (Mark, worker)
Suite	Next steps	Refers to the next step for the liberation process	"We need to continuously improve, all the time. And communication. It's so, so important." (Kathy, worker)
Information_communication	Information_communication	Refers to the communication and information flows going through the organization	"Well, communication is a major issue. We are trying to work on it, but it's not easy." (Carmen, worker)

Mouvement	Movement	Refers to the idea of movement when talking about the liberation process, to describe the sensation of the change	"Well... to say that it is a river... I think at first, there were many changes regarding to that. Now, it is quieter". (Justin)
Organisation de l'équipe	Team organization		
1_Organisation de l'équipe-Avant	Tream organization_Before	Refers to how the team was organized before the transformation	"Before, when we had an operation manager, who was meeting the team leaders, back in the days. [...] They knew all that was happening and made all the decisions without any consultation." (Bertrand, worker)
2_Organisation de l'équipe-Pendant	Team organization_During	Refers to how the team was organized during the transformation	"Then, the operation director was gone and the middle management was a bit stuck. You had people that needed to make decisions on the floor but that were not used to do it." (Colbert, worker)
3_Organisation de l'équipe-Après	Team organization_After	Refers to how the team was organized after the transformation	"It's like a wheel that is turning. The more freedom you give to your team, more they give freedom too, the more the leader give it to the team." (Bertrand, worker)
Embauche	Hiring	Refers to the hiring process	"The people in HR, we don't need them anymore. It is the teams that will do the hiring." (Colin, worker)
SDT			
Affiliation	Affiliation	Refers to connections between people, to community, to sense of belonging	"One of the biggest challenges, it is that naturally, you work a lot with these guys. And, more often than not, all these guys are linked together through friendship." (Justin, worker)
Autonomie_liberté d'agir	Autonomy_freedom to act	Refers to idea of being able and enabled to make decisions and take action, feeling of freedom	"Nobody will tell you, okay, you can't do this. [...] You are allowed to do what you are interested in doing." (Jeff, worker)
Compétence	Competency	Refers to competency, ability to accomplish tasks effectively, confidence in ability	"The advantage, I would say the main one, is the development of each individual." (Justin, worker)
Sentiments-émotions	Feelings_Emotions	Refers to emotions and feelings expressed by participants	"I tell my family, my friends, people close to me, it is clearly the place where I have been the happiest in my career". (Lionel, worker)

Figure 6.2 Mindmapping (data analysis)



Appendix C : Interview Protocol

Figure 6.3 Interview Protocol

Interview protocol	
Research questions and interview guide Links between Liberated enterprise (LE) and Self-determination theory (SDT) Semi-directed interview questions	
Questions	Objectives
1. Can you describe to me some of the changes that you have seen happen in the last 2 years within your organization?	Gain insights on how the changes are perceived, how they were brought forward and if there are any mechanisms that are related to SDT Understand the person's perspective on the process
2. How did the company handle those changes as a whole? (Fluidity? Chaos? Both?)	Understand some of the impacts of the change, how it was "lived" and to identify some of the areas where SDT could be identified
3. What are some benefits, advantages, of this new way of working?	Identify what are the positive elements that are important to the person to see what would need to be kept/encouraged
4. In what way have those changes had a negative impact, if any?	See possible link with SDT – what needs were met or not
5. How have you, personally, managed the transition? What did you need to do differently? Did you have to rethink about how you work? Did you need to learn new things, new processes? Can you give me an example?	See how learning/unlearning has taken place, what beliefs were let go, how it happened. See possible link with SDT – what needs were met or not
6. Now that this new way of doing things is "established" within your organization, how is it maintained, sustained? Are there new practices that were tried and that have been discarded so far? If so, which ones? Have there been trainings/meetings/process to ensure that the model is maintained?	
7. For you, personally, how do you think this way of doing things will go in the future? What will need to happen to make this a success at the organizational level? At the individual level?	Understand how LE can be sustained in time See what actions would need to happen and how they relate to SDT

Figure 6.4 Ethics Approval Form

Université d'Ottawa Bureau d'éthique et d'intégrité de la recherche		University of Ottawa Office of Research Ethics and Integrity	
		29/10/2019	
CERTIFICAT D'APPROBATION ÉTHIQUE CERTIFICATE OF ETHICS APPROVAL			
Numéro du dossier / Ethics File Number		S-10-19-775	
Titre du projet / Project Title		Freedom to act An exploration of the links between liberation management and self-determination A case study from a Canadian manufacturing company.	
Type de projet / Project Type		Thèse de maîtrise / Master's thesis	
Statut du projet / Project Status		Approuvé / Approved	
Date d'approbation (jj/mm/aaaa) / Approval Date (dd/mm/yyyy)		29/10/2019	
Date d'expiration (jj/mm/aaaa) / Expiry Date (dd/mm/yyyy)		28/10/2020	
Équipe de recherche / Research Team			
Chercheur / Researcher	Affiliation	Role	
Chantale JACQUES-GAGNON	École de gestion Telfer / Telfer School of Management	Chercheur Principal / Principal Investigator	
Martine SPENCE	École de gestion Telfer / Telfer School of Management	Superviseur / Supervisor	
Conditions spéciales ou commentaires / Special conditions or comments			
550, rue Cumberland, pièce 154 550 Cumberland Street, Room 154 Ottawa (Ontario) K1N 6N5 Canada Ottawa, Ontario K1N 6N5 Canada			
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29/10/2019

Université d'Ottawa

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University of Ottawa

Office of Research Ethics and Integrity

Le Comité d'éthique de la recherche (CÉR) de l'Université d'Ottawa, opérant conformément à l'*Énoncé de politique des Trois conseils* (2014) et toutes autres lois et tous règlements applicables, a examiné et approuvé la demande d'éthique du projet de recherche ci-nommé.

L'approbation est valide pour la durée indiquée plus haut et est sujette aux conditions énumérées dans la section intitulée "Conditions Spéciales ou Commentaires". Le formulaire « Renouvellement ou Fermeture de Projet » doit être complété quatre semaines avant la date d'échéance indiquée ci-haut afin de demander un renouvellement de cette approbation éthique ou afin de fermer le dossier.

Toutes modifications apportées au projet doivent être approuvées par le CÉR avant leur mise en place, sauf si le participant doit être retiré en raison d'un danger immédiat ou s'il s'agit d'un changement ayant trait à des éléments administratifs ou logistiques du projet. Les chercheurs doivent aviser le CÉR dans les plus brefs délais de tout changement pouvant augmenter le niveau de risque aux participants ou pouvant affecter considérablement le déroulement du projet, rapporter tout événement imprévu ou indésirable et soumettre toute nouvelle information pouvant nuire à la conduite du projet ou à la sécurité des participants.

The University of Ottawa Research Ethics Board, which operates in accordance with the *Tri-Council Policy Statement* (2014) and other applicable laws and regulations, has examined and approved the ethics application for the above-named research project.

Ethics approval is valid for the period indicated above and is subject to the conditions listed in the section entitled "Special Conditions or Comments". The "Renewal/Project Closure" form must be completed four weeks before the above-referenced expiry date to request a renewal of this ethics approval or closure of the file.

Any changes made to the project must be approved by the REB before being implemented, except when necessary to remove participants from immediate endangerment or when the modification(s) only pertain to administrative or logistical components of the project. Investigators must also promptly alert the REB of any changes that increase the risk to participant(s), any changes that considerably affect the conduct of the project, all unanticipated and harmful events that occur, and new information that may negatively affect the conduct of the project or the safety of the participant(s).

Riana MARCOTTE

Responsable d'éthique en recherche / Protocol Officer

Pour/For **Barbara GRAVES** Président(e) du/ Chair of the **Comité d'éthique de la recherche en sciences sociales et humanités / Social Sciences and Humanities Research Ethics Board**

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