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Politics in Packaged Software Implementation

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Abstract

The academic literature relating to the political issues of information systems is fairly well established. However, there are relatively few empirical studies relating to the political issues associated with the organisational implementation of package software. The aim of this paper is to offer a modest contribution via case study research with an analysis of a packaged software implementation at an organisation based in the United Kingdom. The study raises issues that support and question some of the notions inherent in many political theories relating to information systems. The study also highlights the multifarious and complex nature of politics in the development of packaged software implementation.

Keywords

Politics and packaged software.

Introduction

A significant number of organisations operating in diverse business sectors are adopting packaged software. That is, software which is generally sold as a tradable product via a vendor, distributor or store (Sawyer, 2000). In particular, packages such as those to support Customer Relationship Management (CRM) are becoming very popular in supporting organisational strategies (Light, 2001b). Indeed, there is a growing tradition of research into packaged software that has recently been fuelled by the take up of applications such as those for Enterprise Resource Planning. Packaged software research has focussed upon issues associated with selection (Chau, 1994; Chau, 1995), implementation (Ciborra and Failla, 2000; Markus et al., 2000), usage (Light, 2001a) and packaged software as a product (Keil and Carmel, 1995; Sawyer, 2001). However, there remains a dearth of attention in respect of the political aspects of packaged software. It is with this backdrop that the author presents a case study that is used to illustrate a range of issues associated with the politics of packaged software implementation.

The next section of the paper provides an overview of the political issues in information systems and considers how such issues are reported upon in the literature. This is followed by the research methodology leading to the presentation and analysis of the case study. The empirical data is used as a basis for an analysis of the reported thinking in the literature in an attempt to identify similarities and disparities between the two. This leads into the conclusions of the study and recommendations for further research.

Political Issues in Information Systems

There are some who dismiss the political significance of information systems (Gouldner, 1976). Those subscribing to the functionalist approach believe that issues in the development of information systems are based on technical, rather than socio-political issues. Therefore information systems development is perceived to be a singularly rational or a politically neutral process. Functionalist theory has been heavily criticised by many for being naïve (Knights and Murray, 1994) or inaccurate (Markus, 1983).

The politics of information systems involves a range of important and complex issues and has evolved from the literature on the relationship between information and power which has a fairly long tradition (Wilensky, 1967), (Pettigrew, 1972) and (Greenberger et al., 1976). Studies continue to highlight the link between access or control of information and the preservation or advancing of organisational power and influence (Standing and Standing, 1998). Some studies have also highlighted that naïve actors in political situations can be seriously disadvantaged (Franz and Robey, 1984). Some studies have been cautious about an automatic link between information and power, whilst Robert McNamara's success (Ford, US Government and World Bank) was attributed to being an effective user of information, Archie McCardell (Xerox) successful career was considered not to be related (Pfeffer, 1992).

The evidence that information systems are a political and technical process is considerable (Sillince and Mouakket, 1998). A recurring theme is that information systems have a political dimension because of their potential to influence organisational change in respect of issues such as organisational relationships, patterns of communication, influence, authority and control (Keen, 1981). In addition, an early study of organisational IT expenditure concluded that it involved many disputes often resulting in irreconcilable differences between actors (Pettigrew, 1973). Other studies have highlighted that information systems have the potential to become a political and tactical battleground where individuals or groups perceive such processes as non-rational or against their interests, thus they seek to counter or undermine projects by trying to divert resources or deflect its goals (Bardach, 1977; Keen, 1981).

There are divergent political ideologies relating to information systems. One of the most analysed areas could be termed as the negative theory of information systems politics. The negative ethos is associated with many strands of oppositional political theory and often characterised by counter-resistance. Actors are said to oppose and counter information systems implementations if they perceive them to result in domination (Morgan, 1997) or they increase surveillance (Zuboff, 1989). The issue of counter-implementation is classically developed by the three theories of resistance: people-determined, system-determined and the interaction theory (Markus, 1983). People-determined theory relates to the propensity of information systems to enable organisational change and of human nature to fear or resist change. System-determined theory of resistance occurs when information systems are opposed because they are perceived to be deficient or non ergonomic. The interaction theory of resistance occurs where systems fundamentally change cultural norms, roles or the balance of power within an organisation i.e. a centralised system in a de-centralised structure. The interaction theory of resistance has been endorsed by many additional

studies. (Broadbent et al., 1991) demonstrated that resistance resulted in project failure due to non-compliance, delay tactics and the seeking of organisational alliances to derail the will of the sponsor. (Myers and Young, 1997) highlighted how the resistance theory successfully defeated attempts to use information systems as steering mechanism for imposing the political will of one group (Department of Health) onto another (health care employees).

Marxist theory is often extended to view information systems as a conflicting political arena contested by the existence of distinct classes (e.g. senior management, middle management, IT professionals and system users) and the inequalities of power and influence between such groups. Case study research of two CAD/CAM system implementations appears to support and undermine Marxist theory (Tantoush and Clegg, 2001). Both cases can be perceived as groups exerting power over others to achieve their aims. The first case concludes that whilst senior managers lacked technical expertise in the project they achieved their aims by dividing and isolating dissenters e.g. engineers. In the second case, the conclusion is that disparate groups worked together fairly cohesively because of a shared perception to unite to counter a greater threat e.g. an external actor. So whilst case study evidence supports elements of Marxist theory they also reveal that such behaviour is not inevitable or the only cause of conflict. Similarly whilst gender issues and conflict continue to generate great interest (Adam, 2002) and the dominance of masculinity can be an important factor in the politics of information systems (Knights and Murray, 1994) many have criticised such theories as mono causal or too deterministic (Hekman, 1990).

The positive ethos could be viewed as fairly accommodating to political activity in information systems because of the value of open dialogue in order to effectively establish and interpret the true nature of contentious or problematic issues. Another strand of the positive ethos is in the use of information systems to empower or emancipate human-organisational activities. The positive theory has been relatively neglected, however, could be emerging through the significance placed within the theory of knowledge management and the desire to empower individuals or groups with greater access to knowledge for effective dissemination (Marshall and Brady, 2001) and (Alavi and Leidner, 2001). The neutral ethos supports the view that political issues in information systems are inevitable and therefore need to be addressed; however, it is critical of the positive and negative theories because of their attempts to predetermine such complexities. Finally, the academic literature relating to the issues associated with political apathy in information systems is relatively scarce, despite the increased incidents of such phenomena in other political environments.

Classifying political theories is problematic and it is inevitable that many can be criticised for their deterministic tendencies or countered by alternative perspectives and findings. However, for (Markus, 1983) and (Keen, 1981), the real value and purpose of examining the politics of information systems is to broaden our understanding of political issues in order to try and attempt to predict or prevent resistance. This is a theme increasingly endorsed by the increasing focus and attention in the literature relating to the information systems project management. Project management is increasingly being perceived as an intensely political arena and significant attention is now being devoted in attempt to develop strategic thinking in relation to improving negotiation techniques (Pinto, 1996).

Research Method

This research was concerned with developing an understanding of the political issues relating to the implementation and use of a packaged software system within an organisation. In the light of this, a case study approach was used. Case studies enable the researcher to pose questions relating to; what are the issues, what is happening, how issues develop and why (Yin, 1994). The case study illustrates an organisations experience of a packaged software implementation. The data for the study was collected over the period of a year beginning at the selection stage and reaching closure at the system implementation. Throughout the study, data was collected via a number of channels including many interviews with members of the project team and others within the company. In addition numerous project meetings and briefings were attended in line with Silverman (1998) who states that researchers should focus upon observations of organisational activity rather than the reporting of such activity. Review meetings were also held with key contacts at the organisation to review the case data as it was transcribed from note form. This combined approach helped to generate data that was rich in detail and high in rigour Miles and Huberman (1994). The case does not intend to make definitive recommendations about the politics of packaged software implementation, although some of the issues raised are of interest in terms of further discussion and possible contributions to further case study research. What can be drawn are specific implications that can be viewed as general tendencies rather than predictions (Walsham, 1995).

Packaged software case study

SIA is a medium sized manufacturing company based in the United Kingdom. SIA is traditional in respect that they have a hierarchical command structure and work is conducted in departments rather than business processes. The company appears to have proven staff loyalty with remarkably low levels of staff turnover. Senior managers within the company believe that communications and cooperation between departments are good; however, this is a view that is not universally shared throughout the organisation. SIA are facing increasing global competition resulting in the recent loss of some key customers. Senior management decided to become more proactive and effective in terms of customer management and service. They requested that all departmental managers conduct a systems audit to examine existing procedures. After a management meeting it was decided that a new customer centric information system needed to be deployed to achieve their business objectives.

SIA could have developed the information system internally or procured a packaged system. Traditionally it is often claimed that making such a choice results in many political issues. In theory, management can elect to source external systems to re-gain power and control over systems development and of their in-house IT resources. Thus, System Developers often seek to protect their interests by resisting the imposition of an external system (Allen et al., 2002). This proved not to be the case at SIA. IT services were perceived by senior management to be generally effective and fairly cooperative. IT Services were accommodating to the idea of adopting a packaged solution and willing to negate some of their influence because they perceived themselves to be over burdened with existing responsibilities including

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maintaining the organisations present information systems portfolio. Therefore the decision by senior management to adopt a packaged software system was one that was fairly popular with IT Services.

Whilst the decision to source a packaged system was fairly well accepted, the process of implementing the system proved to be problematic, divisive and often acrimonious within the organisation. A project team was appointed and given responsibilities for requirements gathering, selection, sourcing, business process change, migration activity, testing, implementation and the initial maintenance of the software system. The appointment of the project team by senior managers was considered by many organisational groups to be unrepresentative and fairly haphazard. The decision to insist on joint control of the steering group was resented by the Sales Director and the IT Manager. The decision appeared to undermine the authority of the Sales Director and it annoyed the IT Manager because of his reluctance to take on such an additional role given his existing commitments. The appointments process was perceived by many groups in the organisation as indicative of status and of future career progression. Such interpretations resulted in a number of political outcomes. The first outcome was to divide the steering committee into three groups, those who were fairly neutral (IT Services and senior management), sales staff and logistical staff. The second outcome related to the exclusion of women from the project team. Few female members of staff made formal complaints of discrimination and patronisation. The overwhelming number of female staff, particularly those within the sales function, appeared to be nonchalant about the process. The third outcome involved the external sales staff, a group particularly sensitive about the exclusion because they were generally perceived to have high levels of pertinent knowledge, engaging with customers on a regular basis. External sales staff became highly suspicious and fearful of the project and management intentions. Some perceived the system would be used to store and exchange specialist knowledge in order to deskill their roles. Some of them believed that the project had a hidden agenda of changing roles within the organisation and that the system would be financed by a cost cutting exercise resulting in staff redundancies.

Within the organisation there were disparate levels of expertise in sourcing or implementing packaged software and there were major disagreements between departments in relation to what should constitute a customer management information system. Because of this it was decided by senior managers to use external consultants to help the project team with the process of requirements gathering, selection, sourcing and implementation. The decision to use the services of external consultants raised additional problems and divisions. Sales staff criticised consultants in the analysis stage of the project for failing to fully appreciate and specify systems requirements that met all of their requirements. Logistics staff perceived that the objectives of the consultants were to specify and thus implement a customer contact management system rather than an integrated or enterprise wide system believing this to be detrimental to the organisation. The consultants observed that SIA were failing to understand CRM and of the sales process to appreciate the need for business process change in order to maximise such benefits as the economies of scale from implementing generic packages. IT Services felt that the consultants seemed to have a vendor bias for a singular software package and that system requirements were simplified or diluted in order to mask the weaknesses of one of the proposed systems. IT services and consultants also disagreed over the priority that should be given to

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such issues such as vendor support, system upgrades, system integration and licensing agreements and which vendors seemed to offer the most appropriate packages. IT Services were failing to convince senior managers of such concerns and of their suspicions that the consultants appeared to be biased towards favouring a particular option. Finally, the researcher observed unease from some SIA project members about the close relationship between senior management and the consultants and how this was impacting on the selection decision-making process; however, few were willing to formally raise such concerns.

Unsurprisingly, with such competing views and opposing groups, the selection of the packaged software system proved to be politically divisive. Firstly, because the internal sales staff had a significant majority within the steering committee they were able to gain some of their preferences more easily than other groups. Secondly, the alternative, enterprise CRM option failed to gain support from other parties, particularly senior management, because it was far more expensive, involved significant business process change and additional system maintenance. Finally, the consultants managed to convince senior management of their case for a particular software package on the basis that it was the most cost efficient option and that they had existing expertise in supplying the package and they could offer additional consultancy services such as systems training. The choice of package resulted in winners and losers; the decision was perceived as a victory by senior managers, sales staff and the consultants and regarded as a defeat by the internal IT and logistical staff.

The political fallout from decisions relating to project team selection, requirements specification and systems selection, contributed to a series of incidents that resulted in the failure to implement the project within expected timescales. For SIA the systems migration was a complex operation. The migration exercise relied heavily on the commitment of key employees to resolve issues such as the effective cleansing and codification of customer related data. Some external sales staff embarked upon a series of delaying tactics that significantly hindered the migration exercise.

The next implementation hurdle involved the need to change business processes and to align working practices with the packaged software system. Many sales staff underestimated the amount of change required in terms of authority, roles and task allocation and the need for cooperation to deliver such change. The project selection process had actually divided employees into disparate groups, sales management, internal sales and external sales. The need to change operating procedures to align to the demands of the packaged system further alienated those groups. The packaged solution required staff to input and record an increasing number of specific tasks into the system and allocate tasks for others to perform by specific periods. This fundamentally changed existing work practices, levels of organisational authority and expectations. Such new working practices were contentious because they were perceived to be unreasonable and unrealistic, particularly the scheduling and allocating of work for others. There were also complaints by certain sales staff that individuals who managed tasks at the beginning of the business chain would benefit considerably from those employed elsewhere because they were unaffected by internal organisational bottlenecks. Finally, the increasing number of surveillance features contained within the packaged system was resented by many sales support

staff because of the pressures arising out of the increasing ability for managers to monitor and judge individual performance.

Finally, the implementation of the customer management packaged solution further exacerbated organisational political conflict between sales and logistical staff. Traditionally sales staff had been criticised for making unrealistic promises to customers that imposed enormous burdens or constraints on the organisation and which were considered impossible to deliver. Logistical staff were accused of being too inward looking and criticised for complacency because they were shielded from customer contact and competitor demands. The software package significantly improved the operational capabilities and intelligence of sales oriented operations. Such intelligence was used as a political weapon to defend their handling of business operations and to highlight a number of operational inefficiencies elsewhere, particularly within logistical operations.

Discussion

The study highlights the problems, complexities and political issues involved in implementing packaged systems and as such compliments existing theory that undermines the functionalist viewpoint. The paper now offers an analysis of the general political issues related to information systems that arise from the case and then focuses upon those that appear to arise as a consequence of a packaged software context.

The General Politics of the Case

Senior managers failed to gauge the extent of existing political tensions within the organisation prior to setting up the project. They also were unprepared for the emergence of such tensions given certain conditions. During the project existing tensions were exacerbated by a series of group conflicts within the project (Pettigrew, 1973). Such conflicts were fuelled by the dominance of sales staff within the steering group and their ability to secure many of their objectives at the perceived expense of others within the organisation. Furthermore, the packaged system was used as a political weapon by sales staff to highlight some of the inefficiencies within logistical operations. Thus, the CRM strategy was failing to meet one of its core objectives, that of the need to improve inter-departmental cooperation.

The study also illustrates the political significance of project steering committees and the political repercussions resulting from a haphazard appointments process. Appointees failed to gauge the widespread perception of how inclusion or exclusion from the key decision making processes appeared to signal intentions or confirm beliefs relating to organisational status. The perceived exclusion of certain groups resulted in two different scenarios. The decision to exclude external sales staff appears to endorse studies by (Keen, 1981) because it did engender fears of losing organisational power. The exclusion of female sales staff is interesting for several reasons. Firstly, it may endorse the theory of information and power in respect of those who historically lack influence may perceive they have little to achieve by resistance and thus such groups comply. However, it may also undermine the deterministic theory that suggests that all groups are politically conscious or motivated because some may be politically naïve or apathetic. Finally, the distorted

composition of the steering committee resulted in a scenario where sub-groups could easily emerge with varying degrees of influence in shaping decisions and power to obtain outcomes. The consequences being a series of politically motivated incidents that proved to be detrimental in terms of worsening employee relations and in the seriously derailment of the project, particularly in relation to systems migration.

The Politics of Packaged Software

In terms of implementing packaged software systems, the study highlights the significance of the need to appreciate the interaction theory of resistance (Markus, 1983). The external consultants were considered politically savvy in terms of securing their objectives and overcoming much resistance. They gained critical senior management support for their preferred option by highlighting the simplistic nature and cost efficiencies of their favoured packaged system. They countered opposition to their favoured package by changing the emphasis of the debate towards the need to consider business process change for systems alignment. Other groups were less successful in resisting undesirable outcomes from the packaged software system, particularly Logistics and IT services because they failed to convince others of their case. Even within the sales process, some of the features of the adopted packaged system proved to be unpopular because they resulted in the changing of operational issues such as the deskilling of roles, the scheduling and allocation of tasks and an increased capacity to conduct management surveillance. The SIA case study highlights that adopting a packaged software system can involve significant organisational change and thus for many people this process is often intensely political (Myers and Young, 1997).

Conclusion

The paper has discussed some of the political issues involved in an organisational selection and implementation of a packaged software system. The SIA packaged software case study is useful for it questions and supports a number of elements within the existing political theory of information systems. It some respect the SIA study questions the deterministic nature of the politics of information systems. It highlights that a minority of people were fairly non-political in terms of the project expressing little interest in seeking power or influence. Such individuals or groups appear to accept packaged software systems because they may be naïve or apathetic about such impacts or they may perceive such systems to be inevitable or beneficial. However, it is more appropriate to conclude that the SIA packaged software implementation supports many of the themes developed in the deterministic political theory of information systems. This particular project did result in the changing of organisational power, influence and work patterns. The results of which were a series of disagreements and acrimonious divisions between many groups relating to the purpose, objectives and resulting outcomes of the particular information system. In addition, some of the changes, particularly the fear of deskilling and increased management surveillance were perceived to be undesirable and resulted in a number of people seeking to resist and counter the progress and success of the system in a variety of ways.

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