

# Businessman ethos and image: review and comparison of research from Portugal and Poland

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**ABSTRACT:** The article examines research on the ethos and image of the businessman in Portugal and Poland, using comparative and diachronic analysis, resorting to secondary sources and critical literature analysis. The purpose of the research determined the descriptive character of the work. After defining the concept of ethos, its functions, and models, the article briefly describes the milestones in the contemporary history of both countries, characterizes the national/organizational cultures and presents the image and ethos of the businessman in each country. In conclusion, attention was drawn to the common and differentiating elements of the ethos and image of the businessman in both countries.

**KEYWORDS:** ethos and image, businessman, diachronic analysis, Portuguese culture, Polish culture

## INTRODUCTION

Businessmen are a significant social group because the middle class is formed with them or around them – essential for socio-economic development and systemic stabilization in democratic countries with a market economy (Cierniak-Szóstak, 2008; Dinis & Ussman, 2006; Jasiocki, 1996). The importance and influence of this social group are overwhelming and seem to grow with the growing economic and social significance of companies on a national, international, and global scale.



Businessmen, however, are a heterogeneous category consisting of business owners and CEOs—chief executive officers. Business owners are independent in their decisions and actions (cf. Jasiocki, 1996); they are not subordinated to anyone, while the latter (CEOs), according to the agency theory (cf. Turnbull, 1997), are the executors of the will of the business owners. Despite the known differences, business owners and CEOs will be treated further as one category since the indicated differences do not seem to impact the issues discussed in this study significantly.

After decades of authoritarian rule, a corporate and colonial state, in 1974, Portugal opened to a democratic Europe and a free market economy (Baklanoff, 1996; Stoer, 1982); fifteen years later, Poland in 1989, after several decades of creating a socialist society and economy, took the direction of building an open democratic society and a capitalist economy (Jarosz, 2007; Rduch, 1994).

The study aims to present the changes in the ethos and image of the businessman in Portugal and Poland since the second half of the 20<sup>th</sup> century.

Ethos and image or social representation (cf. Wagner, 1995) are different concepts. The ethos, which we discuss later, is instead the self-image (self-perception) of a social/professional group. In contrast, social representation is the social image (hetero perception) of that social/professional group, which may or may not be convergent with the former. The ethos and image of a social/professional group are culturally grounded (Bağ, 2012) and limited in time, although they may be long-lasting (Bağ, 2012), and subject to dynamic changes (Gajos, 1997).

One could also legitimately raise the issue of differences between small and medium-sized enterprises and large companies, but in the case of the former, we are mainly dealing with business owners, and in the case of large companies, both public and private, family-owned or with dispersed capital, most often are headed by the CEO.

In the research, we used the critical literature review and analysis methodology. We used secondary sources, namely the results of empirical research by Polish and Portuguese authors from different historical periods. These studies used various research methods and referred to different theories, but we tried to place them in the proper context. Due to the issues raised, the paper is descriptive and comparative. The literature was reviewed by the *Biblioteca do Conhecimento Online* ([www.b-on.pt](http://www.b-on.pt)), Google Scholar, and DOAJ search engines.

Semi-systematic literature review, as a more or less systematic way of collecting and synthesizing research results focused on a given topic, enables to integrate the results of empirical research and to answer research questions that no single study can answer (Snyder, 2019); it is used to collect, critically analyze and summarize knowledge on a given topic in order to provide meta-level evidence and discover areas in which further research is needed and gaps filled (Jesson & Lacey, 2006; Snyder, 2019). On the other

hand, descriptive research is concerned mainly with answering questions about the nature of social phenomena (Mayntz, Holm & Hübner, 1985). It is often the first scientific step into a new research area because well-done descriptive research should answer the questions who, what, why, when, where, and so what? (Grimes & Schultz, 2002).

The recent coronavirus pandemic has drastically changed working conditions, including for businessmen. It seems, therefore, important when this change becomes effective, generalized and relatively lasting to review our knowledge about the ethos and image of the businessman since we are already talking about a new professional ethos (cf. Boulle-nois, 2022).

The following section is devoted to the concept of ethos, its functions, and models. The subsequent sections with the same structure concern Portugal and Poland, respectively: after a brief historical outline of socio-economic and political changes in the second half of the 20<sup>th</sup> century, necessary to understand the evolution of image and ethos, national/organizational cultures are characterized, and the image and ethos of the businessman are described in each of these countries. In conclusion, we applied the conceptual framework that Streeck (2023) referred to as tension between the universal and the particular or the general and the specific when describing what is common and differentiating in the ethos and image of the businessman in both countries. We describe the limitations of the study and indicate opportunities for future research.

### **THE CONCEPT OF BUSINESSMAN'S ETHOS, ITS FUNCTIONS, AND MODELS**

Ethos, from Greek, is a custom or home custom, habit, or character (Bąk, 2012; *Słownik Wyrazów Obcych*, 1971; *Webster's Encyclopedic*, 1994), “the result of a moral development” (Baardewijk & Graaf, 2019, p. 189), and above all “the entirety of socially recognized and assimilated norms regulating the behaviour of its members in a given social community” (*Słownik Wyrazów Obcych*, 1971).

Ethos applies only to significant social/professional groups that stand out in society, and businessmen constitute such a group (Gajos, 1997). Ethos is a descriptive and eclectic category consisting of various proportions of normative ethics, customs, and emotivism (Bąk, 2012). Ethos is the practice of everyday life and the typical ways of behaving in various situations for a given social/professional group, and at the same time, it is a model and comprehensive vision of the conduct of this group and its basic principles (Gajos, 1997). Ethos, or moral ethology, is a collective understanding of matters related to the social role of the group and their moral view of themselves, society, and the economy, which focuses on common practices (mutual relations, activities, discourse) that facilitate the group's pursuit of a “good life” (Baardewijk & Graaf, 2019).

Two basic dimensions of ethos can be distinguished (Bąk, 2012; Gajos, 1997): psycho-

logical/individual—human moral character traits, declared and practised values, giving a sense of subjectivity; socio-cultural—a set of values, judgments, and norms in force in a social/professional group, as well as symbols and material things considered important by it.

The components of the ethos of a social/professional group are a set of:

- (i) norms, beliefs, judgements, assessments, opinions, and values shared by the group (Bąk, 2012; Gajos, 1997; Gasparski, 1997, 2007; Klimski, 2018; Woleński & Hartman, 2008),
- (ii) rules of conduct, attitudes, and behaviours; lifestyle and way of acting (Bąk, 2012; Gajos, 1997; Klimski, 2018; Woleński & Hartman, 2008),
- (iii) customs characterizing a given group, cultivated traditions, symbols, ceremonies, rituals (Bąk, 2012; Gajos, 1997; Klimski, 2018; Woleński & Hartman, 2008).

The professional ethos of a social/professional group has the following functions:

- (i) realizing the need to self-define and develop a group identity (Bąk, 2012),
- (ii) institutionalizing the social role played by the group in society (Gasparski, 2007),
- (iii) giving a sense of belonging to a group and its uniqueness and distinctiveness in relation to other groups and the rest of society (Bąk, 2012),
- (iv) enabling internalization, consolidation of values and rules of conduct by members of a given group, especially new members (Bąk, 2012; Klimski, 2018),
- (v) informing what the group's role in society should look like (Baardewijk & Graaf, 2019),
- (vi) imposing the obligation to manage one's life, i.e., in which skills and personal qualities to invest and in which not (López-Ruiz, 2007),
- (vii) influencing the formation of responsible attitudes (Bąk, 2012).

Idealizing the image of a businessman, Gajos (1997) lists such personality traits as the ability to think outside the prevailing cultural standards; a sense of anticipation; openness to new experiences; personal resourcefulness; social innovation, expressed in the implementation of new ways of behaving.

Gardawski (2012) characterizes a businessman-owner (*empresário* in Portuguese, and *przedsiębiorca* in Polish) as someone who runs their own business, employing workers for this purpose, and who is entrepreneurial (innovative, possessing knowledge and experience and able to take risks) or not. As noted by Piecuch and Szczygieł (2018), even

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though businessmen-owners are presented in the literature as positive and virtuous heroes who change the world for the better, they can also function in the grey (informal, shadow, non-observed) economy, not contributing to economic development at all.

According to the research by Segal and Lehrer (2013), the attitudes of businessmen are characterized by a certain ambivalence because, compared to other social groups, on the one hand, they present themselves as more zealous for personal interest and, at the same time, show a greater predisposition to charity, on the other hand, they present an average level of susceptibility to the assimilation of moral principles in the process of formal education.

Previous research indicates that businessmen tend to be relativistic, relying on cost-benefit analysis rather than universal moral principles; they are characterized by a tendency to reward the effectiveness of action and the ability to take advantage of opportunities, but they also tend to work for the benefit of society and charity, albeit with instrumental motivation (Segal & Lehrer, 2013).

The two models of behaviour characterizing the ethos of businesspeople, according to Gajos (1997), are:

- (1) The tendency to treat the market as a space for unlimited economic opportunities for competing companies, in which the businessman—a greedy egoist, strives to achieve personal goals (maximization of profit). This is a pragmatic position, ignoring or instrumentalizing ethical norms because what counts in it is the effectiveness of action and the premise that the end justifies the means.
- (2) The opposite trend is that economic activities are not limited to financial results but are related to the development and survival of the company in the long term, and the results achieved by the company are closely related to its ethical image and operation.

The three management ethos models currently practised in the West, according to Enderle (2001), are:

- (1) The traditional model, based on increasing the company's value for shareholders, is associated with Milton Friedman's views and represents a widespread picture of how capitalism works. The role of the CEO here is to act for the benefit of principals/shareholders. In this sense, they are free to use any available means (people, strategy, interpersonal networks, values, etc.), if they serve the above-mentioned purpose. The company is considered a legal artefact rather than a social organization. The sole financial goal, however, leads to socially and economically problematic consequences. The model described by Enderle (2001) coincides with the first model by Gajos (1997). According to Enderle (2002), this model promotes business as an unappreciated, disreputable, but necessary occupation, an inhuman and ruthless activity everyone benefits from.

(2) The John F. Welch Jr. and General Electric Way model, in which the organization is a whole of well-coordinated and efficiently operating elements, and not their simple summation, where authoritarian leadership is replaced by democratic (open, impartial, responsible, and transparent) at all hierarchical levels to increase the competitiveness and probability of success of the enterprise. The company's development is not a valueless activity, and ethical values and people working in the company are not only a means to an end. According to Enderle (2001), the social and environmental dimensions in this model are only side effects of the company's core business (bottom line), although they are a source of pride for employees and management and the subject of advertising and promotion of the organization because the goal (simple, straightforward, visionary, and concrete) and a competitive spirit, supported by teamwork, serve to overcome the barriers of bureaucracy.

(3) A sustainable company model based on economic, social, and environmental responsibility. As a typical human activity, business also has a political and socio-cultural dimension in which economic activity takes place, and all this takes place in the natural environment. The social and environmental dimensions, although relatively independent issues, cannot be regarded as constraints or side effects of the company's activities but must be part of a coherent strategy. For Enderle (2001), multidimensional responsibility has become, following this model, a key concept for businesspeople and organizations, a source of pride inside and outside the company, and thanks to this approach, business can turn into a genuinely noble activity.

## **HISTORICAL LANDMARKS AND NATIONAL/ORGANIZATIONAL CULTURE OF PORTUGAL IN THE SECOND HALF OF THE 20<sup>TH</sup> CENTURY**

In the 20<sup>th</sup> century, Portugal adopted the framework of a classic corporate country (Cunha, Clegg, & Rego, 2010; Marques & Ferreira, 1991), as the state and society were built as a system of intermediation in which the Catholic Church held power over the society and the government bureaucracy held power over the state with “a relatively high degree of state concentration of economic management, with a strongly clientelist flavour” (Cunha, Clegg, & Rego, 2010, p.193). In Portugal, for decades of dictatorship and authoritarian rule until 1974, more than in any other country in Western Europe, the economy was in private hands, but it was strongly controlled by the central state authorities, which also conditioned competition; the private sector was concentrated in the hands of several dozen large families whose members married large families of the former nobility – owners of large land estates; the business culture of the time, however, enabled the educated middle class (relatively small in that period) to climb the professional career ladder and achieve high managerial positions (Baklanoff, 1996; Santos, Lima, & Ferreira, 1975). Portugal's economy in this period was based primarily on agriculture,

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supported by revenues flowing from the colonies, and the country itself had the features of a third world country with deep and widespread poverty in the countryside and illiteracy reaching 60% (Bennett & Brewster, 2002). Illiteracy and ignorance were celebrated as a kind of purity in the national-state ideology (Cunha, Clegg, & Rego, 2010).

As a result of the 1974 revolution, the Marxist left took power, and then the socialists; banks and most large and medium-sized enterprises were nationalized, owners of large estates (*latifundia*) were expropriated, and the state-owned enterprise sector became the largest of all OECD countries; wages were levelled, and the cleaning of workplaces and farms from “fascist” elements resulted in a huge emigration of human capital (owners and managers) abroad; in the state-owned sector of the economy, which was strongly influenced by successively ruling political parties, the appointment and dismissal of directors and managers of public companies ceased to have any relation to their performance (Baklanoff, 1996; Santos, Lima, & Ferreira, 1975). The post-revolutionary period stigmatized the functions of exercising power (crisis of authority) in organizations; many later CEOs of enterprises were suddenly elevated to leading positions in this period, similar to persons holding functions in the state apparatus assigned by the ruling party to the highest positions in enterprises of the state sector (Jesuino, Pereira, & Reto, 1993). Only the government of Prime Minister Anibal Cavaco Silva (1985-95) led to the liberalization of the economy and the privatization of state-owned enterprises after eliminating from the constitution (in 1989) the road to socialism and the irreversible nationalization of the means of production (Baklanoff, 1996).

In Hofstede’s (1995) four-dimensional analysis of national/organizational cultures, Portugal belongs to countries with feminine culture (preference for cooperation between employees; integration in the group and helping the weaker ones; pleasant meetings at work; consensus seeking), a high hierarchical/power distance (perception of superiors as paternalistic and authoritarian, but also prefer this type of leadership rather than consultative; employees are afraid of expressing opinions inconsistent with their superiors), a collectivist culture (employees have a sense of duty and are loyal to their superiors; low level of individual initiative; decisions are made by superiors based on personal relationships), robust control and avoidance of uncertainty (need to ensure security, low-risk tolerance typical of closed societies, employee creativity limited by norms and regulations) (Marques, 1994). As Sousa (2008) and Sousa and Triães (2008) point out, a network of small-scale influence peddling (family and friends’ acquaintances, sympathy and hospitality connections, exchange of favours, pulling the strings), socially developed over the years, is a systematic practice in Portugal because the boundaries between the public and private spheres are not specified. This situation may be related to the collectivist nature of the national/organizational culture. Common and widespread in the labor market, henchmanship/clientelism (*cunha* in Portuguese), has significant functional implications for public and private institutions in Portuguese society (Cunha, Clegg, & Rego, 2010; Sousa & Triães, 2008; Sousa, 2008).

In the collective mentality of the Portuguese, a certain traditional culture with pre-modern features, typical of the pre-industrial era, is common (Lopes & Correia, 2003). Traditional societies (Portuguese, Japanese or sub-Saharan African countries) are characterized by paternalistic employment relations, where the employer allows working conditions and wages considered acceptable in the given environment, and the employee respects his/her supervisor (patron) as his/her father (Lopes & Correia, 2003). In the times of dictatorship, before the revolution of 1974, the dominant model was “abusive” paternalism (as in Greece or Spain at that time), characterized by the employer’s lack of trust in the employee and vice versa, the dominant model today is instead “caring” paternalism (Lopes & Correia, 2003; Santos, Lima, & Ferreira, 1975). Similarly, Santos (2000), referring to the values present in Portuguese culture, such as security, solidarity, collectivity, and social order, writes that the enterprise, as a form of extending the family, serves to protect the weaker; that is why many managers strongly resist dismissing an employee because a solidary manager meets with reciprocity and dedication of the employee. Patrimonialism—mixing the private and public spheres; personalism in social relations – the dependence of the value of the perceived individual on the network of relations with other people, families, groups of relatives, friends (i.e., recognizing a person for who he/she is, and not for what he/she does or what he/she achieves), paternalism, bureaucracy, the influence of the Catholic Church, the centralization of power and the ubiquitous strong regulations are indicated as Portuguese social heritage in Brazil (Silva et al., 2008).

Cunha, Clegg and Rego (2010) similarly write about the hidden national character of the Portuguese, which is imperceptible in the mass media or in the representation of the Portuguese parliament because Portugal is an unwritten place of superficiality, an archaic country, close to postmodernity, where traditional values, loyalty, a strong state apparatus and paternalistic attitude and visible pre-modern features coexist with postmodernity. According to Cunha, Clegg and Rego (2010) the activity of the contemporary Portuguese state reproduces the corporate mentality of the old days, despite belonging to the European Union, cultural openness, and strong consumerism, which affects the general lack of social trust, while the Portuguese economy is characterized by state-dominated capitalism.

### **THE IMAGE AND ETHOS OF THE BUSINESSMAN IN PORTUGUESE RESEARCH**

In an opinion survey conducted on a sample of 446 foreign senior managers performing their functions in Portugal (60% of all foreign senior managers in Portugal), with a 32% response rate, the authors obtained the following results: Portuguese managers, although they work as hard as others, do not have a clear strategy, they are not customer-oriented or shareholder-oriented; they do not focus on their work and manage their time inefficiently (they spend long hours at work just to show up); they work poorly in teams and



have an autocratic leadership style; they are individualistic rather than cooperative; they avoid responsibility, prefer not to plan their work, leaving everything to the last minute; creativity and originality are not strong characteristics of Portugal; they are too formal in relationships and obsessed with academic titles/degrees; they are poorly educated (Bennett & Brewster, 2002).

The document of the Portuguese Ministry of Economy from 2003 shows that informality, understood as a set of disturbances in the competitive and business environment of the economy, and failure to meet obligations by companies, was responsible for 28% of the lost productivity of the Portuguese economy (*Portugal 2010*, 2003).

Cunha, Clegg and Rego (2010) write about Portuguese cultural fatalism, particularism, traditionalism and low level of managerial participation, and widespread bad managerial practices, such as lack of planning and systematicity, where competence (merit) is secondary to connections (pulling the strings), exchange of favours, which play a primary role because the “world of business is full of mediations—of others whom one can importune to intercede on one’s behalf” (p. 196).

Qualitative research conducted in 1987-88 by Jesuino, Pereira and Reto (1993) in the form of an interview with 50 Portuguese CEOs, randomly selected from a list of 2000 with the highest recognition in the country, published by the magazine *Negócios*, reveals, among other things, that CEOs see themselves (positive self-image) as optimistic and hopeful into the future, effective and efficient, self-confident, without complexes, hard-working, courageous, serious, tolerant, open, sociable, popular, generous, able to develop and having good interpersonal relationships with everyone, brave, determined and persistent, intellectually flexible, able to improvise, with great possibilities for dialogue and negotiation, focused on success, without family problems. On the other hand, Portuguese CEOs (negative self-image) perceive themselves as lacking organization, time control, and planning skills, lacking rigour, arrogant, willing to do everything but not what is necessary, excessively centralizing power – lacking the ability to delegate power, paternalistic, afraid of taking risks and afraid of change (Jesuino, Pereira, & Reto, 1993).

CEOs attribute their success to personal qualities (45% to moral attributes, such as courage, perseverance, willpower, rigour, a sense of justice, patience, integrity, honesty; 40% to human qualities, such as tolerance, calmness, ability to make contacts, ease of making friends; 12% to managerial and leadership skills, such as technical competence, decision-making skills, planning and organization skills, intuition, risk-taking skills, work skills, being well-informed, motivational skills, persuasion and communication abilities) (Jesuino, Pereira, & Reto, 1993).

In addition, the CEO should (role requirements) care about the interests of shareholders, employees and communities related to the company (suppliers, banks, etc.), have the courage to make unpopular or risky decisions, be goal-oriented and be able to motivate others in this direction, be able to inspire trust in people, have good relationships, be able

to solve conflicts, have power, be able to maintain uniformity of leadership in the company, be intelligent, clever, have extensive experience, be creative and have imagination (Jesuino, Pereira, & Reto, 1993).

CEO behaviours in Portugal during this period include working 50-60 hours a week, rarely individual work (only 20-30% of working time), usually interpersonal activities, frequent domestic and foreign travels, following the news transmitted by the mass media (careful reading daily press) and legal acts in official journals, devoting a significant part of working time to solving issues related to human resources (reorganization and restructuring of enterprises, redefinition of functions, reduction of staff, collective dismissal), but also investing, diversification of activities, conquering new markets, internationalization, instrumental measures (production, rationalization, cost reduction) (Jesuino, Pereira & Reto, 1993). In addition, CEOs often pointed to using motivation and communication techniques in their activities. Almost half indicated activities strengthening team spirit, gaining employees' trust, direct and personal contact with employees, and building family-like relationships, which also serve to develop the CEO's image in the organization (Jesuino, Pereira, & Reto, 1993).

In terms of leadership style, the majority of CEOs declared that they sought consensus (democratic style), and most often, it was a consultative style (hearing employees with the final decision reserved for themselves). Only a tiny percentage declared an autocratic style, i.e., "a tendency to polarize employees, dividing them to those who admire them and those who fear or avoid them" (Jesuino, Pereira, & Reto, 1993, pp. 190-191). However, none of the respondents delegated authority; regarding employee selection criteria, CEOs value loyalty over technical/professional background or diligence, and the most undesirable traits are disloyalty, subservience, self-confidence, and inability to work in a team (Jesuino, Pereira, & Reto, 1993).

As noted by Jesuino, Pereira and Reto (1993), characteristics of Portuguese CEOs such as willingness to fight, determination and focus on success differ from the collectivist culture that dominates the Portuguese society of seeking to belong to a group. However, it may be debatable whether this is a matter of cultural difference (individualism—collectivism) or rather the result of the CEO's sense of efficiency, which Bandura (2001) wrote about, but of course, there are also "collectivists in individualistic cultures and individualists in collectivistic cultures" (p. 16).

Carvalho (1997) studied the characteristics and motivations of businessmen in a sample of 80 micro and small commercial enterprises in the city of Guarda, using an interview questionnaire, factor analysis and analysis of variance. Carvalho's (1997) research shows, among other things, that the primary motivation for becoming self-employed (five motivational factors obtained as a result of factor analysis) was the need for fulfillment, local connections, income and security, the possibility of using public funds and dissatisfaction with the previous professional situation; businessmen started working at a young

age (average—19 years old), while the average age at which they founded the current company is 34 years old; the majority set up companies from own and family funds (78.8%); most come from low-income families with little education; parents of 1/3 of them ran their own businesses; most of them already had a family when starting a business (73.8%) and came from large families (67.5%); 1/3 of them run a parallel activity at the same time and most of them have previous professional experience in the same field before starting the business (51.4%); the majority knows one or more foreign languages (57.6%), 41.3% have completed the fourth grade of primary school or can only read and write, 42.3% have primary or incomplete secondary education, 17.6% have secondary or higher education; 1/3 have vocational education; 56.6% believe that their current standard of living has improved compared to the standard of living they had when starting their own business; 54.8% of them have low incomes. The author emphasizes the significant differences between micro-businessmen and owners of small enterprises: owners of small enterprises significantly more often than micro-businessmen started self-employment due to the need for personal fulfilment. At the same time, other motives did not differentiate businessmen from both groups (Carvalho, 1997).

Rodrigues (2014) interviewed 15 young businessmen from various sectors of the economy in Porto, owners or co-owners of micro and small businesses, to learn about their attitudes and values. The results obtained by her show, among others, the following: the majority have higher education (87%); all had previous work experience before starting their own business; all develop only business activity; for most of them, starting a business was caused by an opportunity or resulted from the need for personal fulfilment; nine companies are limited liability companies, two public limited (joint-stock) companies and four are sole traders (self-employed persons); most of the businessmen have and appreciate strategic partners; eight of them belong to associations; to be successful as a businessman, according to them, it is important to sacrifice, appreciate knowledge and learning, determination, motivation, taking advantage of opportunities, planning skills, creativity/innovation, humility, acting in accordance with values, trust, personal preferences, leadership; as critical success factors, they most often mention human resources, followed by the quality of products/services, customers, creativity and technology; businessmen value technical competences, motivation/dedication, punctuality/attendance at work, teamwork, autonomy, good relations with clients, trust, rigor, professionalism, creativity, sensitivity, availability, humility, dynamism, respect, ambition; most of them, with the exception of one who has no formed opinion, consider the Portuguese state has an excessive participation in the economy.

## **HISTORICAL LANDMARKS AND NATIONAL/ORGANIZATIONAL CULTURE OF POLAND IN THE SECOND HALF OF THE 20<sup>TH</sup> CENTURY**

Referring to Maria Janion's thesis, Dziadzia and Kasperek (2006) believe that the roman-

tic-heroic style of national culture, dominant in Poland for two centuries until the 1990s, i.e., the years of political and socio-economic transformation, exerted a strong influence on the formation of the middle class and the capitalist economy. This style promoted cultural patterns contrary to the market economy because the businessman did not personify the insurgents fighting for the country's freedom. The values and patterns of behaviour presented by him (calculation, success, lack of messianic aspirations, sobriety of thinking) did not meet with recognition, but contempt of a romantic who was to suffer for the nation (Cierniak-Szóstak, 2008, Dziadzia & Kasperek, 2006). Similarly, Kempny (1996), Lewicka-Strzałecka (2006), and Wyrzykowska and Zawadzka (2018) point out that the depreciation of trade, saving money and climbing the career ladder are a partly rooted remnant of the ethics of the nobility and intelligentsia, apart from the apparent influence of socialist propaganda, which despised individualism, entrepreneurship, and private property. However, this romantic-heroic style of national culture was aimed at the national interest, so it was collective and anti-individualistic (Dziadzia & Kasperek, 2006).

In the times of the People's Republic of Poland (1952–1989), most small-scale agriculture was in private hands; services and private trade were marginal activities in the socialist economy, mainly run by one person or by the closest family, and there was almost no private industrial activity, apart from crafts (Gardawski, 2012). Usually, running a private business in those times was possible only unofficially, illegally or on the verge of legality (Lewicka-Strzałecka, 2006). The private sector filled the market gaps of the shortage economy, having a monopoly on providing services to the population (Gardawski, 2012). At the end of the socialist era, the social group of businessmen began to revive: some of these people had their roots back in the times of the People's Republic of Poland and used shortage economy and lack of competition on the market, another group consisted of people operating in the 1980s in the so-called Polish diaspora companies, but there were also students trading abroad at the end of the socialist era, people with economic or specialized technical education, and employees of former state-owned enterprises who wanted to start their own business (Gardawski, 2012; Kamosiński, 2021). The moment of transformation after 1989 led to the appropriation of the party-state nomenclature (Polish United Workers' Party, PZPR—abbreviation in Polish original), better prepared in terms of material resources and with a broader network of contacts with banks and companies than the political opposition and which had the assets of the former party (Podgórecki, 1996); this was also the time of the most dynamic development of the private sector in Poland (Gardawski, 2012; Jasiński, 1996). After several years of democracy, a new generation that entered adult life at the turn of the 20<sup>th</sup> and 21<sup>st</sup> centuries, responsible, entrepreneurial, investing and bearing the consequences of these investments, changed “the inert mass constituting the nation into a community of individuals thinking in terms of their own interest” (Dziadzia & Kasperek, 2006, p. 92).

Nasierowski and Mikuła (1998) investigated a sample of 316 Polish students/graduates

(compared to a sample of Canadian students) of Economics with some labour market experience, four dimensions of national/organizational cultures (power distance, individualism/collectivism, uncertainty avoidance, masculinity/femininity) developed by Hofstede (1995). The abovementioned authors obtained results that show a large power distance (strong centralization of power, strict control, showing signs of power, no need to consult decisions with subordinates, unwillingness of subordinates to cooperate and fear of expressing opinions inconsistent with superiors), high level of uncertainty avoidance (feeling of anxiety, stress, long working hours and after hours; employee creativity limited by norms and regulations that describe in detail permitted and prohibited organizational behaviors), medium individualism (acting on one's own account and in one's own interest; everyone can have a different opinion and can express it without fear; task orientation and not interpersonal relations; autonomy; relations between the employer and the employee are limited to the terms of the employment contract) and above-average masculinity (focus on achievements, preferring material rewards, striving for professional success, strong competition, high level of stress at work) of the respondents. The authoritarian style, although inherited from the times of the People's Republic of Poland, is not readily accepted by Polish respondents, as it is associated with the inefficiency of the former system; this situation may lead to a decrease in respect for authority, which is already low in Central Europe; a not very high level of individualism, in turn, does not mean collectivism in the sense given to it by the past epoch, which is rejected in Poland (Nasierowski & Mikuła, 1998).

From research by Kolman et al. (2003) conducted on a sample of economic students on the five dimensions of culture according to Hofstede (in addition to the four mentioned above, short-term/long-term orientation was also taken into account) in four Central European countries (Czech Republic, Poland, Slovakia and Hungary) shows that Polish culture, similarly to as in the research by Nasierowski and Mikuła (1998), it is strongly masculine, but not as much as Slovak or Hungarian, with a high level of uncertainty avoidance, with a high power distance, but not as high as in the other three countries, with an average degree of individualism/collectivism in a group of Central European countries, but less individualistic than, for example, the Netherlands. According to the authors mentioned above, Poles value good relations at work with their superiors more than representatives of the other three nations. Still, the acceptance of authority by subordinates is not apparent because the mixing of democratic and authoritarian elements in Polish society, which has its source in recent and distant history, creates ambivalent situations towards authority: "Authority is something to be reckoned with, and it is wise to obey at least ostentatiously, but at the same time the legitimacy of authorities is easily questioned (Kolman et al., 2003, p. 83).

In the research conducted in 2006 on a sample of 57 foreign specialists (expatriates) performing their functions in Poland, ineffective/counterproductive functional behaviours of Poles at work shocking foreigners are associated with a large power distance and a

strong uncertainty avoidance (Murdoch & Kaciak, 2011). The 2008/09 survey of business managers by Mączyński et al. (2010), compared with the results of the 1996/97 GLOBE survey, showed that the indicators of high-power distance, individualism and masculinity increased significantly over the twelve years in Poland.

Individualism/collectivism, as a dimension of national/organizational culture, can have a significant impact on cooperation in the network of enterprises' connections (perception of self and common interest, trust and loyalty in business, opportunistic behaviour in relations with partners), such as a high level of uncertainty avoidance associated with individualism, it may limit cooperation in a network of partnerships; like the Mediterranean countries, Poland is one of the countries with a lower level of innovation than the Scandinavian or Anglo-Saxon countries—characterized by a smaller power distance and lower level of uncertainty avoidance (Szymura-Tyc & Kucia, 2016).

In Poland, as in Portugal, clientelism, nepotism, and cronyism are also well known (Doliński, 1995; Jarosz, 2007). “In the People’s Republic of Poland, the source of corruption was the very system of market shortages and the way of obtaining goods that were difficult to obtain”, while in the transformation process, the greatest influence on its success and corruption-generating pathologies were businesspeople (Jarosz, 2007, p.118-122).

### THE IMAGE AND ETHOS OF THE BUSINESSMAN IN POLISH RESEARCH

After World War II, because of socialist indoctrination, until the years of transformation after 1989, business was perceived negatively, and the term businessman had a pejorative meaning (Gardawski, 2012; Kamosiński, 2021; Lewicka-Strzałecka, 2006). The propaganda image or stereotype of a businessman promoted and reinforced by the Workers' party of the People's Republic of Poland and the mass media dependent on it were “*prywatniak*” (“private owner/contractor”, “privateer”), “*badylarz*” (“truck-farmer”), “speculator”, “*kombinator*” (“smooth operator”, “wheeler-dealer”) or a more neutral category of “private initiative”, which uses “shortages on the market in order to achieve unauthorized, above-average incomes” (Kamosiński, 2021, p. 55), “keeps foreign currencies and valuables hidden under the floor”, avoids paying taxes, so it should be charged with a discretionary tax, the so-called “*domiar*” in Polish. Businessmen, according to the same narrative, are a selfish, greedy, and antisocial group whose operation is based on the use of a network of connections and the principle that to achieve something, you have to “grease” because “if you don't grease it, you won't go”. The image of a private businessman of this period was ambivalent, as he was resourceful and cautious but not truly entrepreneurial, able to hide his real income and effectively bribe officials to ensure the survival of his own enterprise and achieve some stability (Gardawski, 2012). At that time, business-related professions occupied low positions in the respect hierarchy for individual professions (Cierniak-Szóstak, 2008; Lewicka-Strzałecka, 2006). In the People's

Republic of Poland, because of equalizing the level of salaries and state policy, which discredited raising the economic status of individuals, prestige was a kind of reward for unearned income, it was a psychological gratification, and signs of respect became a substitute for unsatisfied aspirations in the sphere of income for the intelligentsia (Doliński, 1995; Kempny, 1996; Wyrzykowska & Zawadzka, 2018). The influence of the socialist era formed social relations characterized by a lack of trust (Gardawski, 2012; Podgórecki, 1996). In the transition period between the era of socialism and the return to the capitalist economy, as noted by Kamosiński (2021), the concept of “*podmiot gospodarczy*” (“economic entity”), meaning both a natural (physical) and legal (juridical) person conducting business activity, was introduced as a replacement for the negatively marked “businessman”. During the transformation period after 1989, businessmen represented a low level of group identity (Jasiecki, 1996).

The results of a survey conducted in 2003 by CBOS showed that the public perceived a private businessman as wealthy/rich (73%), thrifty, and wisely spending money (63%), investing in the company without expecting a quick profit (45%), although a significant proportion of respondents oppositely saw the latter issue (42%); he was also well educated (Cierniak-Szóstk, 2008). On the other hand, a private businessman was also perceived as having little time for the family, even though they did not work more than others (53%), showing off their wealth, exalting themselves, considering themselves superior (58%), rather not abiding by the law and dishonest (41%), caring only for themselves and not for employees (55%), living from the work of others, not from their own work (71%) (Cierniak-Szóstk, 2008). In addition, “54% of respondents expressed the opinion that ‘companies were established primarily by people who had connections in various institutions,’ and only 37.5% that ‘they were primarily established by people who had an idea for their own business’” (Cierniak-Szóstk, 2008, p. 4).

From the era of the People’s Republic of Poland, attitudes and behaviours of businessmen have survived, characterized by a low level of trust in public roles and institutions, a low level of participation in organizations/associations, a low level of general trust, which in turn makes it difficult to establish cooperation within the network of enterprises; “the manager was a ‘good host,’ had a paternalistic attitude towards employees, but was also taught socialist creative reporting and had, euphemistically speaking, a flexible attitude to the law” (Gardawski, 2012, p. 130). In the first years of transformation, after 1989, patience and the ability to effectively use existing resources to build the foundations of business were the essential features of businessmen of that period, in their own opinion (Kamosiński, 2021). Jasiecki (1996) emphasizes that both in the times of the People’s Republic of Poland and in the transformation period after 1989, businessmen were one of the most professionally active social categories, carrying out their activities at the expense of leisure, participation in culture or political activity.

In the study “Polacy-przedsiębiorcy 2011” conducted on a representative sample of owners of small and medium-sized enterprises with closed questions, the following selected

results were obtained: 91.7% of businessmen agree that they are constantly trying to develop their company; 90.8% feel responsible for their employees; 86.1% are satisfied with their income; 78.1% are ready to take risks by introducing new technologies that accelerate the company's development; 77.9% run a company in a field consistent with their education; 75.2% have sufficient knowledge and experience to find a job with adequate remuneration in case of problems with the company; 72.7% believe that owners/managers represent employees' interests better than union leaders; 72.7% prefer to develop their business from their own resources and slowly, rather than quickly and on credit; 71.7% separate professional matters from private life; 66.2% agree that giving employees more independence and responsibility helps them perform their tasks better; 59.9% are not afraid of taking big risks; 53.5% speak at least one Western European language; 52.4% agree that when they are not working they feel they are wasting their time; 44.6% would not be afraid to move their business abroad if it was profitable, but 47.1% disagreed with this statement; 46.7% agree that circumventing or breaking commercial law is sometimes justified, but 40.8% are of the opposite opinion and 12.6% have no opinion; 41% agree that you should keep your distance and not be interested in employees' private lives, but 53.2% disagree; 28.9% agree that they should belong to business associations, but 55.8% disagree (Gardawski, 2012).

From the above research, using factor analysis and correlation matrix, the authors obtained profiles of businessmen, which they described as follows: *innovator*—21.7% (he/she constantly introduces innovative methods and technologies to develop the company, is not afraid of taking risks, takes credit for the company's development, and if necessary, he/she will move the company abroad, has extensive knowledge and professional experience, problems with employees are important to him/her, but of secondary importance, however, he/she presents a low level of general trust), *paternalist/craftsman*—35.5% (he/she is focused on the development of the company, introduces innovative methods and technologies, it is very important for him/her to manage employees, hardworking, careful, reluctant to develop the company on credit, not prepared to run a company abroad), *beneficiary*—17.8% (he/she is a fulfilled businessman, has extensive knowledge and professional experience, has a satisfactory income, is law-abiding, prefers to develop the company from its own resources, although he/she is not afraid of risks), *resourceful*—10% (he/she is hard-working and careful, circumventing or breaking economic law is sometimes justified for him/her, agrees that there should be an organization defending the interests of businessmen), and *traditionalist*—10.9% (the extreme case of the resourceful, the least educated and least experienced compared to the others, does not know any languages, does not take a lot of risk, prefers an authoritarian style of employee management) (Gardawski, 2012). Two profiles of an innovator and a paternalist/craftsman, the percentage of which was 57.2% of respondents, i.e., “the dominant groups of company owners from SME sector have shaped patterns different from those inherited from authoritarian socialism” (Gardawski, 2012, p. 148). The authors of the aforementioned research also asked businessmen to indicate social and professional groups with



which they do not identify, obtaining the following selected results: farmers (81.1%), unskilled workers (78.4%), presidents of management boards and managers of foreign companies operating in Poland (78.2%), owners, CEOs and managers of large Polish private enterprises (66%), lower-level civil servants, office workers, masters, technicians specialists, nurses (61.1%), skilled workers (56%), humanistic intelligentsia and liberal professions (53.7%), mid-level civil servants, technicians, heads of departments in factories (53.7%) (Gardawski, 2012).

The study (PPPiW) on the ethos conducted on a representative sample of businessmen in 2014 by the Cardinal Stefan Wyszyński University in Warsaw shows, among other things, that most of them are satisfied with their own achievements (work, standard of living, family, marital life, education); 89% of businessmen in their business activities are based on their own entrepreneurship and resourcefulness, however, this percentage is lower among representatives of micro-enterprises and people with lower education; they do not accept corruption, regardless of socio-demographic variables or their own religiosity, rarely allowing offering a bribe as a requirement of the situation; the activities of enterprises, in their opinion, should be regulated by the market, and not by support from public funds for companies at risk of bankruptcy; 84% of businessmen are convinced that it is possible to achieve and maintain a competitive advantage without violating ethical standards and religious orders; 89.4% believe that it is possible to succeed professionally and climb the career ladder without violating ethical standards and religious orders; businessmen declare themselves as Catholics (94.9%), believers (87.3%), but not systematically practicing (59.9%); they are rather indifferent to the taxation of the Church and the removal of religious symbols from public institutions; 47.9% of them do not have a firm opinion on the impact of religion on the work ethos (Zarzecki, 2014).

Respondents of the survey mentioned above believe that they effectively manage their working time, which allows them to reconcile professional duties with home/family duties; most of them (67.5%) think that being overloaded with work only a few times a year makes it impossible for them to fulfil their family/home duties; the lack of balance between work and family life is declared more often by men (80.3%) than women (19.7%); stress from work several times a year had an impact on family relationships in 73.3% of respondents, and again men felt this condition more often than women; the partnership model of sharing family responsibilities is declared by 91.3% of respondents; the majority of respondents (64.5%) were against sacrificing everything for children (Kawińska, 2015; Zarzecki, 2014).

## FINAL CONSIDERATIONS, LIMITATIONS, AND FUTURE RESEARCH

The evolution of the image and ethos of a professional group with such repercussions in society, as is the case of businessmen, deserves in-depth national and comparative studies. The medical class, teachers, politicians, the working class, and many other profes-

sional groups have already been analyzed in various social studies and from multiple angles. However, businessmen seem to be somewhat forgotten in Portugal. The diachronic approach to the image and ethos of this professional group in different historical periods, associated with distinct socioeconomic formations, inform the respective societies, their political and governing bodies about what moves people to develop this activity and what the values and expectations to remain in it, but also whether wider society positively or negatively reinforces this activity and why.

The research results of both countries are very heterogeneous. There is also a clear asymmetry in the research intensity, representativeness of the results and the methodology used between the two countries. While the interest in the issues of the ethos and image of businessmen in Poland is quite broad and relatively systematic, often on representative samples, in Portugal, apart from the qualitative study by Jesuino, Pereira and Reto (1993) carried out 15 years after the revolution of 1974, there is a lack of research on a large scale on the ethos and image of businessman in Portugal, especially in recent years, in which changes seem to be significant.

In both countries, in the era of authoritarian rule (with a fascist inclination in Portugal until 1974 and in socialist Poland until 1989), the state limited competition in the private sector. However, while, for ideological reasons, the state-owned enterprises sector was dominant in Poland, the private sector was dominant in Portugal.

Poland, like Portugal, although probably for different reasons, is characterized by a significant power distance, strong uncertainty avoidance and short-term orientation. However, Polish culture is individualistic and more masculine, while Portuguese culture is collectivist and feminine (Table 1).

<b>Dimensions/country &amp; score</b>	<b>Portugal</b>	<b>Poland</b>
Power distance	High (63)	High (68)
Uncertainty avoidance	Very high (99)	Very high (93)
Masculinity vs. femininity	Feminine (31)	Masculine (64)
Individualism vs. collectivism	Collectivistic (27)	Individualistic (60)
Short vs. long-term orientation	Short-term orientation (28)	Short-term orientation (38)

Table 1. Hofstede's dimensions of the national/organizational culture of Portugal & Poland

Source: Based on data from *Hofstede Insight* (n/d)

A large power distance and strong uncertainty avoidance, characteristic of both Poland and Portugal, have a negative impact on the entrepreneurship of these societies (e.g., Silva et al., 2008; Szymura-Tyc & Kucia, 2016).

The Polish ability to provide small mutual services and private transactions, inherited from the era of socialism, as well as the Portuguese “*cunha*”, i.e., a network of influence and support on a small scale, inherited from the era of dictatorship and *Estado Novo*, do not seem to differ fundamentally, creating in both societies relationships characterized by a general lack of social trust. However, attention should be paid to the possible influence of this state of affairs on Polish culture with masculine characteristics (greater will of achievements, realization of ambitions, greater effectiveness of action, strong competition) and a certain individualism (freer expression of different opinions, focusing on the task rather than on interpersonal relations; employer-employee relations limited to a greater extent to the terms of the contract; acting more in one’s own interest) and Portuguese feminine culture (greater willingness to help and care for the weaker, in a worse situation, seeking consensus) and collectivist (more familial employer-employee relations; submission to the opinion of the collective; focus on interpersonal relations and to a lesser extent on the task; acting in the interest of the group).

The negative image of the businessman in Portugal before and just after the 1974 revolution and the historically negative image of the businessman in Poland, reinforced by the propaganda of the socialist era and immediately after the 1989 transformation, seem to be weakening. However, it does not mean that they have become unequivocally positive. They may be rather ambivalent because there may be a coexistence of a certain reluctance and, at the same time, a feeling of jealousy in connection with the power owned or attributed to the businessman, their efficiency, and wealth, but these issues must be investigated.

As in Germany, the traditional ethos of “the businessman-patriarch who runs the company responsibly towards himself and his employees and takes care of the staff subordinate to him” (Schuttenbach, 2000, p. 9) was visible after the times of authoritarian rule and may persist in both (Polish and Portuguese) cultures.

Polish and Portuguese businessmen are satisfied with life, family, and work; despite a lot of work effort (industriousness), they have a stable family life and attribute their success to their personal qualities and effectiveness. This self-satisfaction seems to result from the sense of the effectiveness of this social group because, according to Bandura (1991), a strong sense of effectiveness, coping with life, and control over one’s own actions and reduces susceptibility to stress and depression strengthens resistance to adversity and affects an optimistic view of the world.

Polish and Portuguese businessmen notice the excessive participation of the state in the economies/markets of each country because statism still seems to characterize both economies, in which managerial positions in enterprises with state shareholding are filled by the political mandate of the ruling party, the so-called “jobs for the boys”.

There are clear differences between Polish and Portuguese businessmen in terms of education, generally higher and historically conditioned in the case of Polish businessmen.

However, over the years in Portugal, the education of businessmen seems to increase. However, reliable research results should be available to confirm the latter thesis. Most Polish and Portuguese businessmen have professional experience before starting a business.

The results of the investigations referred to above, although they present a very fragmentary, complex, heterogeneous and historically and culturally dependent ethos and image of the businessman in both countries, clearly show that it is necessary to distinguish between ethos and image depending on the category of the company because the values, attitudes, behaviours and competencies of micro-businessmen differ from those presented by businessmen of small and medium-sized and large enterprises, state-owned/public or with state participation from private ones, and in the private sector category, those that are family businesses from those whose capital is dispersed.

This study has obvious limitations, the most important of which is the use of secondary sources – empirical research by other authors, from different theories. The aforementioned limitation, however, with sufficient caution and avoidance of speculative conclusions, can contribute to the enrichment of knowledge and setting interesting new research topics for the future.

The COVID-19 pandemic, which started in 2020, provoked a sudden need to shift, wherever possible, to online/remote work, marketing, and business, using the Internet of Things. This situation undoubtedly affected the image and ethos because it forced a change in all businessmen's behavior, attitudes, and skills, as today, everyone must operate in omnichannel (online/offline). Therefore, this transcultural and/or transnational study can be seen as an introductory study for future research that seeks to answer what are the new behaviours, values, attitudes, and skills considered dominant in the image and ethos of the businessman in this new era, in target samples in both populations.

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