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Efficient Consumer Response - Increasing Efficiency through Cooperation

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ABSTRACT :

The concept of Efficient Consumer Response was introduced by the Supermarket industry in 1992. Since then, other industries have started their own ECR initiatives. This paper examines the key initiatives surrounding ECR, and discusses a framework that attempts to merge the ECR initiatives with Consumer Centric marketing efforts. A case study is presented illustrating the implementation of the framework.

Key Words : Supply Chain Management, Efficient Consumer Response, Efficient Frontier, Continuous Product Replenishment.

INTRODUCTION

The Efficient Consumer Response (ECR) concept was introduced in 1992 as a result of competition from alternative store formats which highlighted major inefficiencies within the supermarket industry and its supply chain. In order to survive, the US grocery industry leaders formed a task force that took an initiative to study how to improve the performance of their supply chain. The results of the study indicated that quick and accurate flow of information through the supply chain enabled suppliers and distributors to anticipate demand requirements far more accurately than current systems¹. The ECR initiative, therefore, transformed the supply chain from a “push system” to a “pull system” where channel partners form new interdependent relationships and where product replenishment is driven by point of sale (POS) data.

As the grocery industry changed, effects of these aforementioned events accrued and became trends which eventually led to structural change. However, it still took time for a manufacturer to move products from point A to point B. So while manufacturers were able to bypass many of the qualitative functions that channel partners such as wholesalers performed, there still remained physical and temporal activities that needed to be undertaken by someone. This fueled the growth of the “partnership logistics” industry, which comprises third-party logistics providers, transportation service companies, and public warehouses².

To follow up on these initiatives, manufacturers, retailers and wholesalers/distributors attempted to establish a new spirit of cooperation and partnership. The challenge for the distributors and retailers was reestablishing the value of the services they perform and leveraging the volume of their independent customers, as the chain leverages the volume from its stores³. Given these conditions, retailers, distributors and manufacturers attempted to maximize the value they offer to the customer – ECR enabled them to do this.

This paper examines the key initiatives surrounding ECR and discusses the primary issues involved in its implementation. A brief literature review is presented in the second section while the third section looks at the background of ECR and its components. The forth section presents a framework and discussion and the conclusions are presented in the fifth section.

¹ See Salmon Associates (1993).

² See Sherman (1994).

³ See Sherman (1994), p. 20-24.

1. LITERATURE REVIEW

In traditional supply chains, suppliers, manufacturers, distributors, and retailers work independently to optimize their individual logistics systems, each concerned with their own part of the physical and information flow. As a result, firms inadvertently create problems and inefficiencies for other players in the distribution channel, which creates additional costs within the entire logistical system. Realizing these inefficiencies, firms have begun to form collaborative relationships within and beyond their own organizations in order to optimize the functioning of the entire logistical system. The objective therefore is to have jointly defined areas of cooperation that are derived from the supply perspective, rather than being driven by the products themselves and compelling the distributor or retailer to be a key component in delivering products to the final customer.⁴

Successful adoption of ECR lies in the ability to maintain manufacturing flexibility that enables channel partners to match supply with demand.⁵ Key to this flexibility is a process tightly integrating demand management, production scheduling, and inventory deployment. ECR is thus an initiative helping to enhance the flow of information between trading partners.

1.1. ECR MODEL COMPONENTS

The primary objective of ECR is to rationalize the distribution chain in order to increase value to consumers. As shown in the figure below, ECR focuses on the customers' actual demand and uses that information to drive the flow of goods through the channel.⁶ The frequency and speed of information through the system has a significant effect on inventory levels, efficiencies, costs, and lead times.

Figure 1: Information Flow in the Supply Chain

ECR simply realigns activities within a common framework to deliver better value to the consumer.⁷ In a recent ECR survey, John Harris (1999) notes several key technology-based initiatives that must be undertaken to rationalize the distribution chain and achieve a successful ECR implementation. The initiatives include:

⁴ See Dornier et al (1998).

⁵ See Weeks, Crawford (1993), p. 34.

⁶ See Weeks, Crawford (1993), p. 3.

⁷ See Pearce (1997).

- Integrated Electronic Data Interchange (IEDI),
- Category Management, Continuous Product Replenishment (CPR),
- Computer Assisted Ordering (CAO),
- Flow-Through Distribution,
- Activity-Based Costing (ABC).

1.1.1. INTEGRATED ELECTRONIC DATA INTERCHANGE (EDI)

EDI is defined as the computer-application-to-computer-application communication of structured, formatted messages based on international standards, using electronic transmission media with no manual intervention.⁸ When successfully implemented, EDI allows structured information to be shared among organizations in the supply chain, which results in significant reductions in transaction costs. It is viewed as the essential effective enabler of the ECR management strategy because it focuses on achieving integration across organizational functions along with integration between organizations.⁹

While EDI is viewed as the driver for ECR, many of the efficiencies and benefits expected to be created have yet to be realized. The problem is that EDI requires a significant investment in time and money in order to be implemented, and most companies are unprepared to make the technological and human capital investment.¹⁰

In addition to the standard EDI, the Internet is forcing companies that intending to fully embrace the ECR concept to look at a much broader set of networked technologies more effective in implementing ECR-type processes. "The state of technology has changed dramatically – especially the explosive growth of the Internet – since ECR was rolled out as an industry-wide cost cutting initiative in 1993. The vision of ECR from a technology perspective has to be completely renewed because the original vision of technology does not represent the environment we're in today."¹¹ This change will allow companies to leverage Internet-working technologies and EDI standards to create an integrated and data-driven supply chain.

1.1.2. CATEGORY MANAGEMENT

The focus of ECR, as it relates to category management, is to deliver fact-based information by digitalizing the supply chain.¹² This information leaves little room for interpretation and subjective decision-making throughout the logistics system and ultimately leads to collaborative goal setting and problem solving that didn't exist in the old era of buying and selling. Richard Collins (1999) states that Category Management focuses on four key concepts:

- Matching products and services to the individual store consumer profile,
- The ability of the entire supply chain to react to daily information,
- Putting excitement and convenience into shopping,
- Identifying new opportunities and developing new categories and products to address those opportunities.

⁸ See Brawn (1990).

⁹ See Harris (1999), p. 1-5.

¹⁰ See Tosh (1999), p. 8.

¹¹ See Tosh (1999), p. 10.

¹² See Lewis (1998), p. 27.

Furthermore he believes that the companies in the US have made a big mistake by focusing all their efforts with ECR on reducing costs and not on the idea of effective category management through ECR.

1.1.3. CONTINUOUS REPLENISHMENT PROGRAM (CRP)

An effective continuous product replenishment program is another fundamental platform supporting the overall ECR strategy. Continuous replenishment is a program used to control and monitor the movement of goods from the manufacturer to the warehouse/distributor.¹³ In contrast, the traditional demand forecasting techniques and batch ordering processes used today lead to erratic ordering behavior throughout the entire supply chain. This erratic behavior is amplified due to the magnitude of safety stocks covering long lead-time periods as we move downstream in the supply chain. At the same time, these long lead-times contribute dramatically to demand variance and higher costs of holding safety stocks. The overall result of the distorted information from one end of the supply chain to the other leads to tremendous inefficiencies, excessive inventory, dissatisfied customers, lost revenues, and ineffective production schedules.¹⁴ To remedy this situation, companies are utilizing CRP to achieve a more fluid product replenishment system driven by information based on consumer demand. In addition, CRP programs reduce costs in distributors' inventory, but can increase some expenses such as transportation costs if the manufacturer ships smaller truck loads more frequently.¹⁵ Successful CRP implementation, therefore, is dependent on effective trade relations, requiring shared business practices and information systems relying heavily on EDI.¹⁶

1.1.4. COMPUTER ASSISTED ORDERING (CAO)

Computer-assisted ordering, also known as "computer-aided ordering",¹⁷ covers the second half of the overall inventory supply chain - the movement of goods from the warehouse/distribution center to the retail store. The first half, in comparison, is the movement from manufacturer to warehouse/distributor, which many chains are improving through continuous replenishment systems. The aim of CAO is to generate store replenishment orders automatically, with minimal management intervention, based on such things as current and historical Point of Sale (POS) scan data, delivery data and sales forecasts.¹⁸ According to Michael Garry (1994a), President of Inventory Management Technology, CAO is the starting point from which everything else rolls back up the supply chain, all historical and current data is fed into it and the result is an automatically generated store replenishment order.

The benefits of CAO have been identified as labor savings and dependability, warehouse and shipping improvements, and inventory reduction. Traditionally, stores have based their orders on the re-order clerk manually inspecting the store shelves and scanning the shelf-tag barcodes for those items with limited stock on the shelf.¹⁹ The re-order amount entered by the clerk is based on the actual shelf amount and the ideal shelf quantity. At this point s/he does not have information about quantities on

¹³ See Garry (1994); Grose (1993).

¹⁴ See Grose (1993), p. 3.

¹⁵ See Grose (1993), p. 13.

¹⁶ See Grose (1993), p. 9.

¹⁷ See Thayer (1991), p. 81.

¹⁸ See Thayer (1991), p. 9.

¹⁹ See Anderson (1996).

and or of future deliveries. Integrated CAO systems are designed to minimize and even eliminate these problems.²⁰

1.1.5. CROSS-DOCKING (FLOW-THROUGH DISTRIBUTION)

Cross-docking and flow-through distribution are frequently cited as key processes in the quest toward ECR implementation.²¹ The concept of cross docking was a result of the growth of product customization and product proliferation causing increasing volumes of orders to move through the supply chain. At the same time, competition and slim profit margins were driving manufacturers and distributors to find productivity and customer service improvements through better use of information technology.²² As a result, new techniques were developed to achieve greater inventory accuracy and closer integration with POS data collection. This data collection process allows retailers to decipher the behaviors and causal factors of demand fluctuations in order to gain insight into what moves a product at the retail level. Through this shipments can arrive at the distribution center as needed to fulfill customer demand.²³

The purpose of cross-docking is to speed up the flow of products from the supplier to the retail store by reducing storage and handling of products at the distribution center or warehouse. It involves the breaking down of pallets at the distribution center, reassembling them for store delivery and then shipping them to the retail store without storing the product in the warehouse.²⁴ Cross docking actually skips the inventory process altogether by moving products needed for outbound orders from receiving directly to shipping.²⁵ This requires significant investment in technologies such as EDI, bar coding and scanning of pallets and cases as well as warehouse design changes such as lower ceilings and less racking. It also requires channel partners to overcome their traditional adversarial relationships and realize how each participant can benefit from sharing information.²⁶

While cross docking is frequently cited as a key process in the quest for ECR implementation, few companies have attempted its implementation due to the perceived enormity of the task. Studies conducted²⁷ by Advanced Marketing Research (AMR) show that less than seven percent of warehouses, both public and private, are automated to any extent. However, results of a Manufacturing Systems survey²⁸ reveal that individual manufacturers invested approximately \$509 million to enhance their cross-docking capabilities, and the numbers are expected to increase in the coming years.

1.2. ACTIVITY-BASED COSTING (ABC)

Activity-based costing provides the cost and operating information necessary to support innovative management improvement initiatives such as ECR. The focus of ABC is to provide information about the true cost of products, services, processes, activities, distribution channels, customer segments,

²⁰ See Anderson (1996), p. 9.

²¹ See Sherman (1995), p. 57.

²² See Dilger (1997), p. 82.

²³ See Dilger (1997), p. 21.

²⁴ See Dilger (1997), p. 9.

²⁵ See Dilger (1997), p. 22.

²⁶ See Dilger (1997), p. 21.

²⁷ See Dilger (1997), p. 22.

²⁸ See Dilger (1997), p. 22.

contracts and projects.²⁹ ABC supplies information about profits (where the money is being made) rather than about costs. Traditional accounting systems use gross margin calculations that spread operating costs across all products based on unit purchase price regardless of the actual value chain through which the product passes.³⁰

A growing number of distributors and suppliers are embracing the ABC concept. Proctor and Gamble has gained notoriety for its streamlined logistics programs which use ABC to identify activities that distributors can engage in – such as EDI, faster uploading, and drop and hook – to reduce product costs.³¹ Miller and Gary 1996, present another example of a successful ABC implementation at Spartan Stores. In 1996, Spartan rolled out a pricing structure for its retailers that identifies the costs associated with each item. Moreover, manufacturers in the same category that have traditionally charged Spartan the same price will no longer see their products priced identically by Spartan. This is because Spartan's price reflects the cost of moving the product through its distribution center. Jim Swaboda, Director of Grocery/General Merchandise Purchasing for Spartan Stores is quoted as saying that until now, inefficient manufacturers had been subsidized by efficient manufacturers. But under the new approach, markups would be based on the real costs of handling products.

ABC assigns costs to activities in the work environment as a way of both revealing those costs (which have been previously hidden) and finding ways to reduce them. Ultimately, it provides a better understanding of how profits are generated and increases the visibility of costs within the system.³² Rather than squeezing budgets, ABC focuses management's attention on controlling the source of costs and decisions that create activities. Therefore, ABC analysis as part of ECR can increase the profitability of the supply chain by removing or reducing those cost activities that do not add value. This cannot be done with traditional systems because they do not reflect costs accurately.³³

2. ECR FRAMEWORK

The literature refers to several initiatives companies have taken to adopt ECR (Gertler, 1994, Harris 1999, Lewis 1998). In this age of logistics, the final consumer is driving the market and marketing strategies. Plans and investments must be geared to this fact. Consumers are moving from the traditional 4-Ps of the marketing mix (Price, Product, Promotion and Place) to the more recent consumer-centric 5-Cs (Cost, Consumer, Communication, Convenience and Care).³⁴

The literature on the retail industry comments on consumer-centric organizations tending to be more effective in meeting consumer demands³⁵ at a lower cost.³⁶

Frameworks have been proposed in literature to tackle the challenge of consumer oriented supply chains. The following framework attempts to merge the ECR initiatives with consumer-centric marketing efforts in which ECR is used as a facilitator. Collins (1999) believes "In the US, we made a big mistake by focusing all our efforts with ECR on reducing costs". This framework will go a long way in addressing this criticism.

²⁹ See Miller (1996).

³⁰ See Miller (1996), p. 9.

³¹ See Andel (1998), p. 4-8.

³² See Andel (1998), p. 13.

³³ See Weinstein (1995).

³⁴ See Kotler (1991); Kurtz, Boone (1989).

³⁵ See Randice (1997); Sansolo, (1993).

³⁶ See Garry (1993); Matthews (1994); Wood (1993).

The main features of the proposed framework are:

- The move from a traditional to consumer-centric approach replacing the 4-Ps with the 5-Cs of a consumer-centric organization.
- Make use of category management techniques to efficiently introduce, promote, replenish and assort merchandise and to establish a set of criteria to measure goals within primary functions.
- Leveraging the competitive strengths of an organization enabling it to move to a more efficient level in terms of a consumer satisfaction/service level.

2.1. REPLACING THE 4-PS WITH THE 5-CS OF A CONSUMER-CENTRIC ORGANIZATION

It is not uncommon to hear statements like “To survive as we move into the twenty-first century, we can no longer rely on a product-centric approach to marketing”, or “those who can execute on the promise of customer-centric marketing will be most successful”. Executing on customer-centric marketing is not easy. In fact, fundamental changes are required in three key areas: organization, culture and technology. Change management is a difficult practice for even the most savvy of organizations, and executing on customer-centric marketing requires sweeping changes that will impact almost every area of the organization. However, with a focused, evolutionary process to follow, the change to customer-centric marketing can be made with minimum disruption.

One of the first steps is recognizing and accepting the fact that traditional product-oriented marketing can no longer effectively serve the goals and needs of any organization. Product-oriented marketing operates on the principle that customers buy whatever an organization has to offer. Instead, to be successful in the future, organizations must focus on how they can create and increase customer value and long-term loyalty. “Creating value for customers is the foundation for every successful business system. Creating value for customers builds loyalty, and loyalty in turn builds growth, profit and more value.”³⁷

Creating real value for customers requires that all marketing and sales initiatives converge at the customer with a true understanding his/her needs. Convergent marketing allows an organization to truly coordinate all activities with a focus on building value for the customer and the organization and achieving greater customer loyalty.

Making the move from product-oriented to customer-centric marketing requires a complete understanding of the key differences between the two approaches. Identifying the main characteristics and impacts of traditional product-oriented marketing makes it easier to see how customer-centric marketing is different in increasing long-term loyalty.³⁸

³⁷ See Reichheld (1996).

³⁸ See McEachern (1998), p. 485.

2.2. ESTABLISHING A SET OF CRITERIA TO MEASURE GOALS WITHIN PRIMARY FUNCTIONS

The four goals of an efficient ECR initiative, namely efficient store assortment, promotion, product introduction and product replenishment facilitate inventory management within the supply chain along with maintaining the consumer-centered approach. The following is a brief description of each of these goals.

2.2.1. EFFICIENT STORE ASSORTMENT

The objective of this initiative is optimizing the productivity of inventory and shelf management at the consumer level. Optimal allocation of goods on supermarket shelves (known as “store assortment”) maximizes consumer satisfaction by providing the best products and services while at the same time ensuring the most efficient use of available space to increase manufacturer, distributor and retailer profitability. The relationship between manufacturers, distributors and retailers is crucial in achieving efficient store assortment. To streamline business practices in the area of store assortment, manufacturers, distributors and retailers need to adopt a “category management” approach.³⁹

2.2.2. EFFICIENT PROMOTION

Efficient promotion maximizes the total system efficiency of trade and consumer promotions. Efficient promotion attempts to eliminate inefficient trade promotions (forward buying and diverting) by introducing better alternative trade promotions such as “pay for performance” and “forward commit”. In Pay for Performance programs the pay/compensation is linked to measurable outputs of the trade. The better the trade performance the more it is compensated. Forward Commit is basically a commitment to buy at a fixed rate in the future before the products hit the market. This enables the buyer to lock into a price while the producer knows what s/he is guaranteed to sell.

2.2.3. EFFICIENT PRODUCT INTRODUCTION

The objective of the new production initiative is to maximize the effectiveness of new product development and introduction activities in order to reduce costs and failure rates. This is achieved by the involvement of wholesalers/distributors and retailers and consumers at an early stage of the new product development process. Manufacturers, distributors and retailers must work together as allies to reduce the costs of product development and to produce only products anticipated and demanded by the consumer marketplace. Once again, the “category management” strategy plays a crucial role in achieving this initiative because of its contribution to an understanding of successful existing products. The efficient product replenishment (EPR) system applies to all consumer categories. The ultimate aim is to maintain desired consumer service levels at retailer outlets while minimizing logistics costs⁴⁰ including: inventory holding, transportation, warehousing, information acquisition etc. The strategy for EPR is to partner with key accounts and strategic service providers to:

- Explicitly identify desired consumer service levels based on data and scientific methods.

³⁹ See Knill (1997), p. 14.

⁴⁰ See Knill (1997), p. 39.

- Explicitly consider tradeoffs among all logistics costs.
- Redesign processes to reduce logistics costs.

2.3. COMPETITIVE STRENGTHS OF AN ORGANIZATION AND MORE EFFICIENT CONSUMER SATISFACTION/SERVICE LEVEL.

Efficient Frontiers are designed to help measure and improve the performance of organizations. The quest for greater efficiency is never ending as managers are always under pressure to improve the performance of their organizations. Today, managers must cope with and make sense of an enormous amount of data relating to their organization. The challenge is to somehow derive useful insights from all these numbers that will lead to improvements in the performance of the organization. All attempts to measure performance may however produce no overall clear picture as considerable variation depending on the performance indicators chosen. This is where Efficient Frontier helps as it provides a more comprehensive measure of efficiency by taking into account all the important factors affecting an organization's performance. It is seldom the case that a unit has only a single input and output. There are usually a number of factors, determining the operational efficiency of a unit. The higher the ratio of output to input the more efficient an organization is in producing that output. The Efficient Frontier's Graph is a method of resolving this graphically by plotting, for example, overall costs to the outlet service levels. This is shown in the following 'frontier graph':

Figure 2: Working at the Efficient Frontier

Figure 2 shows the cost-service relationship. Higher service levels can be attained using proportionately lower costs by leveraging the process changes to move to a new cost-service curve, resulting in lower costs for the desired service level. A company can leverage its "strengths" and move its cost-service curve outward to gain better service levels at proportionately lower costs.

When more than two outputs and one input or one output and two inputs are active the problem becomes 'multidimensional' and is no longer suitable to be represented graphically.

3. CASE STUDY

The Alpha-Delta⁴¹ Company is one of the world's largest computer hardware manufacturers. The company produces more than 10,000 products used by both individual and industrial consumers. The company had a net revenue in excess of \$20 billion in its 1997 fiscal year.

Traditional Approach [4-Ps]	Consumer-Centric Approach [5-Cs]	Response of a Consumer-Centric Organization
Product	Customization	Meet category needs Use of category product management system to tailor products/services to meet retail buyer and channel partner needs
Price	Cost	Consumer relationship management system Provide efficient consumer support in pre- and post-sales environment to minimize a buyer's time investment and create loyalty Facilitate differentiation
Place	Convenience	Shelf Replenishment System Ensuring information on product availability to facilitate inventory management Key account management system to successfully manage and retain alliances
Promotion	Communication	Consumer relations management Processes in place to facilitate feedback
	Care	Putting in place processes that ensure customer satisfaction

Table 1: Consumer-Centric Initiative at Alpha-Delta

A substantial amount of its business comes from overseas operations. Headquartered in the US, it has major sites in Europe, Latin America and Asia. It sells its products and services through over 500 sales and support offices and distributorships in more than 120 countries by means of resellers and retailers.

⁴¹ The name and figures used in the case are disguised to protect the identity of the company.

The Alpha-Delta Company has adopted a consumer-centric approach to its product management and has processes to ensure compliance with this new initiative. Table 1, reflects the response of the company to the changes.

Assets		Functions		Process Goals	
		Goals		Measures	
Consumer Relationship Management System	Image of the brand Customer service and support	Premium image in the selected market. Loyalty of customers		Brand equity Consumer satisfaction, loyalty retention, advocacy, & profitability	
Information Network	Information management	Information at the right place & time		Quality & speed of decisions	
Category Product Management System	Use of Category Management to manage products	Dominant market share		Share of category	
Shelf Replenishment System	POS data SKU Forecasting at all levels Dynamic Computer Assisted Ordering Electronic Warehouse Receiving	Production to consumer same day Supply & demand balanced throughput		Total order fill rates Information, inventory & cash to cash cycle times. Costs	
Store Support System	In-Store Merchandising In-Store Data Collection	Winning the shelf war Keeping the diagnostic & predictive data in focus		Share of shelf In-Store Hours	

Table 2: Process Goals and Measures

Along with the consumer centric initiative, Alpha-Delta has also initiated “Category Management” approach to managing products and organize them as business units. Category management provides a more effective way to cater to customer demands and managing supply-chain relationships because it has a more broad-based interest. Coupled with the recent ECR initiative at the company, Alpha-Delta has reaped promising benefits.

Two forces are driving ECR: awareness of the cost structure and understanding the consumer mindset.⁴² New measurement systems that track performance and mask non-value added costs are essential. Goals and respective measures need to be set up to ensure greater control and smooth functioning of the ECR initiative. Table 2 lists the core assets developed through “Category Management” and the different measures that could be used in tracking progress along with the process goals.

While ECR looks at the processes, Alpha-Delta is also using the theory of Efficient Frontier to help lower its costs while maintaining the desired service levels. Table 1 shows the cost-service relationship. Higher service levels can be attained using proportionately lower costs by leveraging the process changes to move to a new cost-service curve, resulting in lower costs for the desired service level.

CONCLUSIONS

This paper has presented the key initiatives surrounding ECR, discussing the primary issues involved with ECR implementations, and has described how ECR is being applied within the computer hardware industry. Both the Consumer Centric approach and ECR initiatives have greatly affected the way companies look at their business. The benefits derived from these in monetary terms are great and well documented. The dry grocery retail industry, which was one of the first to adopt ECR in its business practices, has according to one estimate reaped over \$30 billion in savings.⁴³ Another study by McKinsey estimates that dry grocery consumer prices were reduced by 10.8 percent by the adoption of ECR industry wide.⁴⁴ Other companies are only now coming even with the grocery industry.

Most companies in the past have invested in optimizing production or in optimizing the selling process. More recently, companies have channeled their investments into optimizing the purchasing process. The inexpensive nature of web-based EDI and its connectivity to ERP systems has enabled purchasing processes to migrate from an out of control activity to a more organized set of transactions. The procurement process is a front office activity in the supply chain. In the new paradigm of the consumer-centric approach a reverse process has taken place with the front office receding into the back office and vice-versa. Customer-centric has come to mean supplier-centric for the flow of information.

The Alpha-Delta Company, one of the benchmarks for ECR in the computer industry, has adopted ECR and benefited both in monetary terms and also in increasing the awareness and brand loyalty of its products. Specific measures have ensured a scientific approach to this initiative and brought about acceptance within the company.

⁴² See Harran (1994), p. 7.

⁴³ See Wood (1993), p. 39.

⁴⁴ See Jenkins (1993), p. 147.

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The Lexus and the Olive Tree: a Rising Mode of Internationalisation

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ABSTRACT :

*In his book *The Lexus and the Olive Tree*, Friedman (2001) discusses the synergistic relationship between the two emerging cultures in the world economy: the Lexus culture, which stands for efficiency, trans-nationality and technological sophistication of the new global economy, on the one hand, the olive tree culture representing tradition, rootedness, embeddedness in local and cultural identities, on the other. While the world of the Lexus is being promoted by the elite businessmen, politicians, academics and media, Friedman argues, it is in fact profoundly democratising and represents a vision of society that countless poor around the world, voting with their feet, try to realise. This vision of a global culture is transferred through what Friedman calls the 'golden straitjacket', that is, the set of rules, routines and procedural knowledge that is enforced by the Lexus culture on the country or the locality that wishes to participate in the world economy. On this view, globalisation as articulated in the Lexus culture and localisation as represented by traditions and local values are meant to go hand-in-hand, complementing and supporting each other. One of the common forms in which this cross-fertilisation of global and local features has come to be articulated is what is called brand-affiliation, whereby a small or medium enterprise affiliates with the values and demands of the Lexus culture. In this sense, affiliation with icons belonging to the global culture is increasingly becoming more and more irresistible for locally-bound small enterprises, which are hampered by their 'smallness' and by their limited global reach, compared to their larger, globally omnipresent competitors. Attributes of the global culture – such as brand recognition – may function as an 'endorser' to small and medium enterprises (SMEs) and an ingress to global customers.*

Nowhere is this trend more evident than in the hotel industry, where the practice of franchise or affiliation has become the most popular method for independent, small hoteliers to obtain global brand recognition, without compromising their local identity and without relinquishing (too much) operational control. Affiliating with an established, a globally well-recognised endorser-brand, for instance, may enable small hoteliers to gain access to global, central reservation systems, coordinated marketing, collective purchasing systems, loyalty programs, etc. Through affiliation, local hoteliers, although still embedded in their local market, are able to transcend the limits of their regional or national reach, and are able to target clients on a global level. The price paid for this mode of internationalisation by the independent hoteliers amounts to various types of fees and the abiding by a set of rules, values and service standards – which are crucial ingredients in the globally recognised brand. Next to this trans-national brand, which is associated with what Friedman refers to as the Lexus culture – individual hoteliers are also meant to manage their own, locally and culturally anchored brand identity.

1. AIM OF THE PAPER

Given the increasingly popular practice of networking through brand affiliation or brand endorsement as a mode of internationalisation for SMEs, the present paper seeks to explore the drivers behind networking through affiliation with a brand endorser, focusing on the interplay and exchange of features between the global and local brands, as represented by the cultures of the Lexus and the olive tree, respectively, and the challenges of managing two brands and of running a local business on a global level. Finally, the paper discusses the implications of networking through brand endorsement for the theory and practice of SMEs' internationalisation process.

In illustrating these concepts, I draw on case study material gleaned from small hoteliers operating in the region of Stockholm and which have affiliated themselves with Best Western brand in an effort to 'tap into' global market and to increase their chances of competing in the world market. It is hard today for independent hotel owners to maintain market share. Reports claim that during the past 20 years, branded hotels slowly have outperformed independent hoteliers in the US (Frabotta 2000). In Sweden, there are, at the time of this writing, about 50 Best Western-affiliated hotels, and more are expected to follow suite.

The brand affiliation approach to the internationalisation process of services has not warranted much research attention. Our understanding of the internationalisation of small and medium size enterprises (SMEs) is mainly framed in terms of three sets of theories: stage models (Cavusgil 1980; Johanson and Vahlne 1977, Cavusgil 1980), foreign direct investment (FDI) theories (Hymer 1976), and network theories (Johanson and Vahlne 1990; Coviello and Martin 1999). On the one hand, SMEs are supposed to internationalise their activities progressively and incrementally. As they gradually increase their fund of knowledge of the foreign market they are supposed to enter, they increase their commitment and investment. Knowledge is assumed to reduce the risk of operating in new and distant markets, and ultimately to overcome the risks and disadvantage of the 'foreignness' (Coviello and Martin 1999) of the market. FDI theories, on the other hand, are premised upon the assumption that a firm enjoys a firm specific advantage (FSA), which has to be exploited in a timely fashion by the firm in a market place, before that FSA is eroded (Hymer 1976). The strength of this FSA is assumed to enable international firms to compete successfully against local firms, in spite of the fact that they suffer from the handicap of foreignness. On this view, firms internationalise through FDI, without relying, to any great extent, on their knowledge; however, maintaining direct control is their main concern. As for the network approach to the internationalisation of SMEs, it downscales the significance of FSAs as a factor that lionises international firms, positing that international growth is attendant upon the sharing of complementary, competitive advantages with other firms (Coviello and Martin 1999). Through networking, a firm may position itself in foreign markets much more quickly than it can do single-handedly. In this way, it can draw on the complementary strength of partners in the desired market.

Underlying these three approaches of internationalisation is a set of metaphors that refers to cross-border activities, as implied in the expressions 'market entry', 'market penetration', 'market extension', etc, which reduce the process of internationalisation to a move away from a given place to new, unknown, or 'foreign' places, leading to outbound, cross-border activities during which physical products or services find their way into other places. This may not be the case for the internationalisation of hotel services, where the internationalisation process involves a host of in-bound cross-border customers, which turn the local market into a global market. Whereas our understanding of SMEs' internationalisation process presumes a divergent move, a shift away from a given place to indefinite, foreign places – with all the perils and types of risk that that move may imply – the internationalisation of hotel services implies a convergent move from foreign places to local, 'familiar' places, since these take on features of the global culture relating to guidelines, norms, rules and standards, which all seek to render the local place globally familiar to foreign guests.

Networking through brand endorsement is an under-researched area. Traditional network theories emphasise the role of personal and business relationships in SMEs internationalisation process. On this view, the internationalisation of SMEs can readily be understood in terms of gaining access to a host of tangible and intangible resources of a player who enjoys a firm specific global advantage. More specifically, in the case of small hoteliers, networking implies a reduction of the foreignness of their services through a familiar, globally recognised brand. The brand is meant to endorse for the quality and uniformity of the service across the globe. Brand endorsement is thus viewed as a shorthand of what the global guest may expect in terms of service level. From the brand owner's point of view, the culture of the Lexus is meant to vouch for the local culture and to elevate it to global standards, through the imposition of norms and rules, or what Friedman refers to as 'the golden jacket'. In return, the hotelier pays a certain (membership) fee, which can be seen as an investment (an FDI) - small as that may be - since this can turn the local hotel into a global one. Hence this type of internationalisation is reminiscent of the FDI approach. The same logic could be used to understand the global player's tangible investment in the small hotelier. The willingness of a global player to network with a small hotel can be based on the perception that the hotelier enjoys a locational advantage. In this way, the two partners gain access to each other's market by making a joint foreign investment and by sharing the risk.

By the same token, features of the stage models can be evident in the internationalisation process of hotel services through the practice of franchising or affiliation. Instead of operating incrementally in stages, both parties may rely on each other's stock of market knowledge and build on it, rather than painstakingly developing their own fund of knowledge step by step. They can leapfrog the initial stages, since each is supposed to gain access to that through networking. The hotelier's knowledge of the local market becomes partly that of the global player, and the global player's (technological and market) knowledge and practices become shared by the hotelier, through affiliation or franchising. Hence networking may actually embrace features of the three mainstream theories within which SMEs' internationalisation processes are commonly understood.

The remainder of the paper is structured in the following way. The next section (Section 2) will treat the rise of networking as an ingress to an international market space and a way of allaying the fears of foreignness, narrowing the focus onto brand endorsement as a core component animating SMEs' search for global presence. Section 3 will make a short account of the empirical material serving as an illustration of the concepts and ideas tentatively presented in this paper (section 5). Finally, Section 6 discusses this increasingly popular form of internationalisation and the implications of networking through brand endorsement.

2. NETWORKING AS A MODE OF INTERNATIONALISATION

As touched upon above, the three theoretical traditions that have framed our understanding of firms' internationalisation process: stage models, FDI approach and network theories may all have affinity with networking. The network approach draws on theories of social exchange and resource dependency, focusing on firm behaviour in the context of inter-firm links. Whereas Johanson and Vahne (1992) suggest that it differs from the two other views in that it is the outcome of interactions and the development of a multitude of relationships, from the perspective of this paper the stage models and FDI mode can be subsumed under the network approach. However, networking de-emphasises the view underlying FDI theories, that Firm-Specific Advantages (FSAs) asymmetrically favour international firms, regarding instead international growth as based largely on sharing respective complementary, competitive advantages with other firms (Hamid and Wright 1999). Although growth through networking may imply some loss of independence and revenue sharing, a small firm may be able to position itself in foreign markets much more quickly than it could have done

relying on its own resources (Hamid and Wright 1999). Through networking, a firm may gain access to the necessary market knowledge, drawing on the complementary strengths of other players in those areas in which it feels that its behaviour is crippled by foreignness. One may suggest a shift away from emphasising the control through ownership of all the tangible and intangible resources that a firm requires for its internationalisation process to a view that stresses networking as an access to these resources, instead.

According to Castells (1996) networks are the newly emerging organisational forms, suggesting that network-based structures are appropriate instruments for a capitalist economic order based on innovation, globalisation and decentralised concentration; for work, workers and firms based on flexibility and adaptability and aiming at the transcendence of space and the annihilation of time. A global network widens the reach and depth of its members, thereby making each of them bigger than what they could separately be. Removing the constraints, traditionally imposed by physical proximity and presence, constitutes a most significant feature of networking. It can spare partners the costs of owning significant resources, building infrastructures and running local branches, while simultaneously creating access to economies of scale.

The components of the network are both autonomous and dependent with regard to the network. Global networks are open-ended structures whose boundaries are capable of expanding in order to integrate new nodes, as long as they are able to communicate, using the same code (such as values or performance goals). Within one and the same network, flows between two nodes have no physical, economic, social, political, cultural distance; this distance is, however, infinite between nodes belonging to different networks (Castells 1996: 470). The performance of a network relies on two attributes: its *connectedness* (its ability to facilitate noise-free communication between its components); and its *consistency*, that is, the extent to which the interests between the network's goals and the goals of its components are shared (Castells 1996: 171). Distance (physical, social, economic, political, cultural) is superseded among the nodes of a network. This transcendence of time and space is facilitated by the exchange of a host of practices, information and knowledge facilitated by a technological infrastructure, information and knowledge and cultural elaborations conveyed through symbols and brands.

Technology-mediated, virtual knowledge, and local, context-based knowledge

Technology is conceived of as "the use of scientific knowledge to specify ways of doing things in a *reproducible* manner" (Castells 1996: 30). According to Castells (1996: 103), competitiveness in the global economy is determined by firms' technological capacity, by which he means the science base of the production and management processes, the R&D strength, the human resources necessary for technological innovation, the adequate utilisation of new technologies, and the level of their diffusion into the network of economic interaction". Networking brings together science, technology, management, and production in a pattern of complementary relations. New technologies have enabled small and medium enterprises to link up and interconnect with themselves and with large corporations. The emergence of interactive, computer-based, flexible processes of management, production and distribution has given rise to such forms of cooperation and interactions among firms on a global level. This alignment between technological advances and organisational, managerial demands and requirements has led to a view of networking as a strategy that enables firms to expand and top into new markets and to share the risks of foreignness.

In a networked economy, productivity is defined in terms of the generation and the efficient deployment of knowledge and information processing (Castells 1996: 17-18). As new technological intermediaries begin to have their say, the nature of knowledge itself is changing (Leyshon and Thrift 1999: 434). Increasingly technology-mediated knowledge, in contrast to knowledge as derived from personal experience, functions with hardly any referent, that is, it does not refer back to any

individual's particular experience or beliefs, source or origin. Leyshon and Thrift (1999) distinguish between various forms of knowledge. One of these is referred to as 'virtual' knowledge, which is an abstract form of knowledge, concerned with producing and deploying theories of business knowledge. Second, there is 'formula' knowledge, which seeks to capture practical management knowledge into procedures and best practices that can be deployed in different contexts. Third, there is 'business information', propelled by the imperatives of precision marketing, a practice that is targeting consumers with accuracy (Leyshon and Thrift 1999). What is relevant here is the point that since such forms of knowledge can be codified, cheaply replicated and easily transferred across borders through information technology media, experiential learning that is usually based on (costly and painful) trial and error, can now be accessed through network affiliation. These forms of globally mobile knowledge differ from local market knowledge that local SMEs draw on, since the latter is traditionally accumulated through proximal face-to-face interactions with customers. It is, to a large extent, embodied in the entrepreneurs and their staff members and the local context in which they are entrenched. Whereas global knowledge relies on computer systems and large databases, local market knowledge is based on personal judgement and the sharing of a social, cultural context. The two are posed to go hand-in-hand.

Virtual Culture :

Related to the emerging forms of abstract knowledge, Castells (1996: 199) suggests a cultural dimension to global networking, what he refers to as 'virtual culture,' which is the glue of the various parts of a network. Contrary to traditional culture based on historicity and locality, virtual culture is not a unifying system of beliefs and values. Rather, it involves a lifestyle and a way of designing spatial forms aimed at unifying the symbolic environment of the elite around the world, thereby superseding the historical specificity of each locale. Thus, there is "the construction of a (relatively) secluded space across the world along the connecting lines of the space of flows, international hotels whose decoration, from the design of the room to the color of the towels, is similar all over the world to create a sense of familiarity with the inner world, while inducting abstraction from the surrounding world; airports' VIP lounges, designed to maintain the distance vis-à-vis society" (Castells 1996: 417-418). The worshipping by this elite of similar rites and symbols such as brands, ensures that travellers never feel lost wherever they happen to be and that they belong to a community, imaginary though that may be. These symbols aim to shape an identity that is not linked to any specific society or any historical moment, but to a membership of the international economy across a global cultural spectrum (ibid.). Virtual culture is a-contextual, a-local and a-historical. One of the most salient identity-defining symbols of this international culture is global branding, as discussed in the next section.

3. GLOBAL BRANDING AS A FEATURE OF A VIRTUAL CULTURE

Global brands are meant to evoke similar emotions and images all over the world. Customers worldwide would expect the same thing from such brand names as Coca-Cola, IBM, McDonald, etc. Brand theorists suggest that brand equity or value constitutes 'a set of assets (and liabilities) linked to a brand's name and symbol that add to (or subtract from) the value provided by a product or service to a firm and/or to that firm's customers' (Aaker 1996: 8). Brand assets mainly involve *brand name awareness*, *brand loyalty*, *perceived quality*, and *brand associations*. By brand name awareness Aaker (Ibid.) refers to the strength of a brand in the consumer's mind. As for brand recognition, it reflects brand familiarity resulting from past exposure. Recognition predisposes consumers to evoke positive feelings toward the brand. On this view, consumers are supposed to prefer an item they have previously seen to one that is completely new to them. Thus, in choosing among a number of brands, consumers are more likely to opt for a familiar brand than one that is unknown and that suffers from a

familiarity handicap. Aaker (1996: 21) includes brand loyalty as the third asset category arguing that a) a brand's value to a firm is largely created by the customer's loyalty it commands; and b) the fact that loyalty could be seen as an asset will instigate firms to invest in loyalty-building programmes which are geared towards enhancing and fostering brand equity. A highly loyal customer base could be seen by prospective affiliating members as a source of future profits, since it is assumed that it is much less costly to access the current customers base than building their own brands. Customer loyalty could also be seen as an entry barrier, since customers are, to some extent, locked-in to the brand, averting the risks of switching to another unknown brand. On this count, companies undertake various loyalty-enhancing initiatives, such as frequent-buyer programmes, customer clubs and database marketing (Aaker 1996: 24). Such programmes are meant to provide reinforcement for loyal behaviour, and to confirm the point that the firm is committed to its customers.

In their effort to clarify and differentiate their identity, brand strategists may choose among four brand perspectives, as distinguished by Aaker (1996): brand as a product, brand as an organisation, brand as a person, and brand as a symbol.

A core element of a brand's identity usually refers to its product thrust, which controls the type of associations that are pursued. Here there is no distinction between the product and the brand. The brand comes to mind as soon as a certain product is cued. The brand Honda is a name that comes to mind when either motorcycles or automobiles are mentioned (Ibid. 80). Brand-as-an-organisation focuses on attributes of the organisation as a whole, rather than on its products or services. Attributes of that strategy can be innovation, concern with environmental questions, a drive for quality, etc, as created by the founders, their values, their culture, commitment to excellence and technological expertise, etc, all of which are organisational attributes that transcend any particular product model (Ibid. 82). In Aaker's (1996: 83) view, brand as a person suggests a brand identity that is richer than one based on product attributes. Like a person, a brand can take on human features, such as competence, trustworthiness, fun, activity, humour, warmth, etc. The car Saturn has the personality of a reliable, down-to-earth friend. Further, brand personality can be the basis of a relationship among people; it can also affect relationships (Ibid.) and emotion among people. Brand personality is a characteristic of small enterprises, often dominated by one or few persons. Its forte is its ability to create relationships among people, such as warmth, care, concern, commitment, personal service, etc.

The global brand, which by necessity, and at least initially, is meant to be relatively abstract, being devoid of any specific contextual connotations in order to appeal to many contexts simultaneously, it has to draw on product attributes and functionality. This does not mean that it may develop into a brand as a symbol, as in the case of McDonald, Best Western, IBM, etc. Hence, the boundaries among the different types of brands are fluid; for brands are dynamic like organisms. For, a brand based on product, organisational, or personal attributes may in time take on symbolic features, for instance. By the same token, the local brand, based on the personality of the entrepreneurs and anchored in a particular culture and social setting may also evolve into a brand as a symbol. Whether a brand as a product (such Best Western) and a brand as a personality (such as local hotels) can peacefully co-exist, support each other or tarnish each other is a question we shall return to in the discussion section. Let us now review how brand based on functionality and a consistent product can vouch for and endorse for a local, personality-based brand.

4. ENDORSING LOCALNESS THROUGH A GLOBAL BRAND

Brand endorsement through brand affiliation will create a process of spillover of features to the local place, where a place is viewed as "a locale whose form, function and meaning are self-contained within the boundaries of physical contiguity" (Castells 1996: 423). As touched upon above, whereas a

local brand aims to create warm and friendly relationships for value-oriented consumers, in order for it to become a global place, it has to provide a meaning for a cosmopolitan, mobile and nomadic clientele. This is where a global brand that passes on to the local brand those features, or endorses it, comes to play a significant role in the internationalisation process of SMEs. Because brands are usually backed with substantial advertising and marketing funds, it is costly for SMEs to afford building a global brand on their own. Rather, through brand endorsement, SMEs can gain access to a globally recognised brand, enabling them to supersede heavy investments and cut down on the time it usually takes to foster a global brand. Brand endorsement refers to a situation where an endorser enjoys wide recognition and uses that recognition on behalf of a consumer good by appearing with it in an advertisement (McCracken 1989: 310). In this sense, a global brand, enjoying wide recognition may endorse the services or products of a small, unknown and unfamiliar firm. Endorsing in an explicit mode stands for: "I endorse this product" (Ibid: 310). The endorser is associated with specific expertise and skills. Of course, endorsement works under certain conditions of which McCracken (1989: 310) discusses two: the 'source credibility model', and the 'source attractiveness model', both stemming from social psychology research. According to the former view, a message depends for its effectiveness on the "expertness" and "trustworthiness" of the source; where expertness is defined as 'the perceived *ability* of the source to make valid assertions' and trustworthiness as 'the perceived *willingness* of the source to make valid assertions' (McCracken 1989: 311). Hence sources exhibiting expertness and trustworthiness are credible, thereby persuasive. According to the attractiveness model, a message depends for its effectiveness mainly on the "familiarity", "likeability", and or "similarity" of the source (McCracken 1989: 311). By 'familiarity' is meant knowledge of the source through exposure. By likeability is meant affection for the source as a result of the latter's physical appearance and behaviour (Ibid.). Similarity refers to resemblance between the source and the receiver of the message. On this view, a source that is known, liked and/or similar to consumer is attractive and thus persuasive (Ibid.).

McCracken (1989) suggests a meaning in the endorsement process, there takes place a transfer of a complex of bundles of cultural meanings from the source to the product and from the product to the consumer. The model consists of 3 stages. In the first stage, the endorser transfers meanings into a product – meanings that they have created into a product by dint of intense marketing efforts and repeated performance. An endorser adds meaning to the meaning transfer process. What special powers and properties an endorser has are determined by the fact that they have become a symbol into and unto themselves. In the next stage, the similarities between the endorser and the product are highlighted so that the consumer is 'able to take the last step in the meaning transfer process' (McCracken 1989: 316). If all goes well the properties of the brand endorser become those of the receiver of the endorsement. The third stage has to do with how consumers get the intended meanings out of the product into their lives. In other words, the properties of the global brand are first transferred to the local offerings of the local firm and then to customers of those offerings. The implication is that products and services are identity-producing elements and providers of cultural belonging. As hinted above, an international clientele consumes symbols to signal their belonging to a virtual culture.

The aim of the next section is to merely illustrate the ideas tentatively presented above through the example of a number of small hoteliers located in the region of Stockholm (Sweden), which have affiliated themselves with Best Western brand in their search to internationalise. Through their membership to Best Western hotel, they profit from the endorsement and benefits of the marketing reach of a global brand, from the pay-offs of central reservation systems through access to a network, large scale purchasing systems, reservation systems, and quality insurance criteria and standards which are the token of a global virtual culture.

5. SMALL HOTELS' INTERNATIONALISATION PROCESS THROUGH AFFILIATING WITH BEST WESTERN

Best Western was founded in America about 50 years ago by M K Guertin. The idea behind the chain was to allow small hoteliers to build joint marketing and booking systems. Today, Best Western is the largest hotel chain in the world, grouping around 4000 hotels world wide, out of which 1300 in Europe and 50 in Sweden. It is not a profit organisation, rather it is a cooperative enterprise where membership fees are reinvested in the organisation, as decided by the members themselves. Best Western is posited to combine person-based brand identity and a globally recognised, symbol-based brand. Hotels are meant to enjoy both a local identity and global reach. Membership requirements include a minimum number of rooms of 100, a certain locational advantage, certain service quality standards, and the adherence to Best Western's golden straitjacket (quality criteria, global quality control systems, brand requirements and a cooperative disposition). Best Western is able to insure the quality of its member hotels through 60-odd Quality Assurance consultants who control each hotel at least once a year. The total cost of a hotel affiliation is around 2.1% of rooms' revenue for Best Western (which is technically not a franchise). The fees usually include a royalty fee for the use of the trade name and service marks, advertising or marketing contribution fees, reservation expenses and frequent traveller costs. Other fees often include computer software, training programs, global distribution systems and equipment rentals.

Best Western draws on rich statistical data, which facilitate small hoteliers' forecasts, plans and strategies, in order to achieve higher profitability. The overall aim of Best Western is to leverage its members' profitability through effective and innovative coordination and streamlining of marketing, sales, booking and purchasing systems. Central purchasing systems help them cut down around 15% on raw material, credit card clearance, etc. The Best Western brand stands for delivering value for money, exceptional guest service and clean, comfortable accommodation for the traveller, all with the flavour and style of the individual hotel and its location. In the Best Western Manual, the brand is described as: "a trusted symbol of our guests' expectations of quality. Always keep in mind that the most visible aspect of our identity is our logo and the impression it creates. Consistent use of the logo will enable you to more effectively compete in the new century".

Every Best Western hotel in Europe is to achieve 100% compliance with the branding regulations as outlined in each item section of its manual, for each of the following 'items': Primary Exterior Signage; secondary Exterior Signage/Logo at each Hotel Guest Entrance; Roadside/Directional Signage; Courtesy Vehicle; Membership Plaque; Telephone Answered "Best Western"; Advertising; Three Logo items in the Public Areas; Onward Reservations Plaque; Best Western Brochure Rack; Display the Best Western European Atlas at Reception; Hotel Brochure or Rack Card; Letterheads (and Envelopes if the property identity is displayed); Business Cards; Three Logo items in the Guest Rooms; Display Best Western National Guide in the Guest Room and Guest Directory.

6. DISCUSSIONS AND CONCLUDING REMARKS

Small hoteliers have internationalised their services through affiliating with a global brand. By affiliating themselves with a globally recognised brand that endorses for their services, by elevating them from their context-bound localness and making them more familiar to international guests. Managing a global brand requires a great deal of resources, advertising and marketing funding which small hoteliers are hard put to raise. BW's loyalty programme is significant for small hotels. Brand affiliation may enable them to compete with larger hotels. Being part of a network, they can enjoy corporate purchases, sales, marketing, advertising and central reservations, at the same time, they are able to

remain, up to a certain degree, independent vis-à-vis BW. In this sense, small hotels can see their share of their offerings grow without themselves growing in size, a contingency that increases their competitiveness. But growth without growing is paid for by an increase in administration, since a small hotel's affiliation with a network implies a great deal of informational exchange among the different nodes in a network. Hoteliers are hard put to codify their activities and processes so that they can be shared by other nodes. This process of codification or writing boils down to a conversion of what hoteliers knew in a tacit way into explicit information. Writing is in complicity with bureaucratisation (Weber 1967).

Still, most of the interviewed hoteliers agree that the advantages of being part of the Best Western network cannot be underestimated. The access and the ability to distribute information in a cost-effective manner and in a timely manner are crucial. BW's global technological infrastructure, database management and knowledge about changing customer needs – which are essential for small hotels to maintain a global client base and improve their services - require technology savvy operators which are difficult to attract and keep by small hotels. One of the disciplinary transformations they have undergone is that quality concerns have become dominant concerns in their daily register, internalising its discipline in such a way that the motives for constantly raising the quality bar become intrinsic, rather than extrinsic from BW, becoming able to exceed their guests' expectations. Being part of Best Western, they become justified to increase their prices, partly in order to compensate for the fees they pay to BW, and partly because they perceive their service quality has greatly improved. In this connection, the golden straight jacket which stands for the Lexus culture, represented by functionality, cost-efficiency and rationalised management practices suggested by Friedman can be seen as a device for shoring up local hotels and extending their offerings to global dimensions.

However, managing two brands (with the two cultures they draw on) has proven both enriching and challenging for the small hotels. BW's brand is based on functional product attributes which guarantee conformity and consistency in what guests would expect in terms of service quality, it has developed into a brand as a symbol, that is used by an international elite as a signalling system, whereby they convey a belonging to a virtual culture and a global life-style. This form of culture is virtual, ephemeral, imagined and shifting. BW and other global brands have become signs whose aim it is to reduce the foreignness of the localness by endorsing for its services. The localness, on the other hand, is stable, being immersed in the personality and the local culture that has nurtured that personality, and is geared towards improving social relationship. Whereas, brand as a symbol lends itself to a shifting and mobile world, brand as person thrives on localness and the sharing of stable values. As put by an interviewee: "while local hotels stand for emotion, care, feeling, warmth and friendship, BW vouches for service functionality, consistency and the creation of a familiar atmosphere". Or as another one put it: "BW stands for business and local hotels stand for the social dimension"; they complement and amplify each other. But where do the two brands come into a collision course?

Hoteliers complain that the BW brand can be emphasised in international contexts, but it may not be suitable in situations where events and activities are typically local, such as a trade union conference, where it is meaningless to accentuate BW's brand. It is in this sense that the instructions of the BW brand are experienced, by local hoteliers as rigid and inflexible. Hoteliers would like more freedom in deciding what brand to emphasise and when. Informants find it unnecessary to observe all the dictates of the BW manual. For instance, member local hotels are not allowed to use environmental-friendly liquid soap instead of the one-time-soaps carrying the BW logo. Global culture promotes a culture of disposables, whereas local culture favours stability and rootedness. There is thus a clash between a global culture, which trades on that which is ephemeral, transitory and a-historical, and a culture based on personal relationships, local values, continuity and historicity. Some hoteliers find it hard to give up core elements of their culture.

Concluding remarks and theoretical implications:

Shorn from the challenges posed by managing two identities, brand affiliation can be used by small enterprises to internationalise their offerings. It enables SMEs to reduce the risk of 'entering' a foreign market, investing in a global infrastructure, and of building a body of market knowledge. All such costs and risks are shared by members of a network. The main implication is that – and this is in support of Coviello and McAuley (1999) and Zafarullah, Ali, and Young (1998) - FDI theory, the stage models, and the network perspective provide complementary rather than distinct views on the internationalisation concept. Although interest in the network perspective to the internationalisation of SMEs' services has grown during the last decade or so (Erramilli and Rao 1993; Edvardsson, Edvinsson, and Nystrom 1993), the specific area of brand affiliation has not received enough attention. Brand affiliation shifts the focus from viewing knowledge as other resources as intrinsically internal to firms towards a conception of resources as relational and that could exist beyond the boundaries of the firm and its national borders. Whereas it has been emphasised that, for instance, relevant market knowledge is gained experientially, that is, through doing business in international markets (Blomstermo, Eriksson, Johanson and Sharma 2001), networking through brand affiliation de-emphasises the importance of experiential market knowledge. Likewise, it reduces the relevance of investment in the foreign market through the sharing of resources with other members.

Finally, in contrast to the assumption, widely taken for granted, that internationalisation has to do with entering a new geographical market, of transcending national borders, thus a move from familiar to places mired with uncertainty due their foreignness, internationalisation may be the transformation of a given place into a global, but at the same familiar place, through the deployment of various symbols, brands and cultural artefacts. In this context, the local place takes on global features, remaining, however, rooted in its localness, although this is not without conflicts and tension between the dictates of global requirements for efficiency, functionality and consistency, on the hand, and social and cultural rootedness. Whether the culture of the Lexus and that of the olive tree can be compatible in every respect remains to be further explored and studied.

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REVISITING THE MANAGER'S PREDILECTION TO USE GENDER AS A BASIS FOR PAY AND ORGANIZATION HIERARCHICAL LEVEL DECISIONS IN THE “SME”

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ABSTRACT

The predilection to use gender as a basis for pay and organization hierarchical level decisions has emerged as a significant topic in management literature. Related issues are the theories of information dependency and gender segregation. This article discusses the theoretical foundations of information dependency theory confirming the importance of subordinates' control of resources, including performance capabilities. Insights gained through this study may provide business professionals in the "petite moyen" with the ability to recognize and avoid the use of gender as a basis for pay and hierarchical level within both the organizational and managerial contexts.

INTRODUCTION

The dependence of pay and organization hierarchical level as affected by gender has been widely studied. Despite the controlling for variables such as age, education, labor market experience, and attachment, persistent gender differences in compensation have been empirically shown to exist (1). In abundance are studies such as O'Neill (2), who researched the behavior of the gender-based differentials for post-World War II era, or Goldin and Polachek (3), who reviewed the literature from a historical trend since 1815.

Gender segregation is suggested to be the major cause of gender bias and discrimination in pay and organization hierarchical level (4). It is argued that understanding a manager's predilection to use gender as a basis for pay and organization hierarchical level decisions may be an element of information dependency, though this bias often varies uniformly across organizational contexts (5).

Information dependency theory suggests, within organizations, the power held by women and men can be determined by both the position and skill of the individual (6). Bartol and Martin (7) furthered the research by showing that pay and organization hierarchical level are contingent on an employee accepting a manager's conditions for providing pay and organization hierarchical level--a scarce resource or reward. Managers in turn are often dependent on subordinates to achieve organizational goals. Thus, managers may utilize pay and organization hierarchical level differentials to manage information dependency threats from powerful subordinates.

Women studies' literature suggests women are more accepting of inequitable pay and organization hierarchical level. This phenomenon is identified as "the paradox of the contented female worker" (8). The literature also advocates the theory that women believe they are less deserving of equitable pay and organization hierarchical level than men (9).

The number of women in the labor force is increasing (10). The enactment of legislation to eliminate sex discrimination in employment practices has heightened public awareness of sex discrimination (11).

The Equal Pay Act (EPA) prohibits discrimination in pay based on gender. It mandates that employers pay women and men with parity when they have jobs that are of substantially equal content (12). The EPA recognizes that the employer may have some legitimate business reasons to have pay differentials exist between women and men. Examples are: differences in 1) seniority, 2) performance, 3) quantity or quality of output, and 4) factors related to the job other than sex, such as working different shift schedules. Despite the existence of this law regulating compensation for over three decades in the United States, there is a vast concentration of research illuminating persistent patterns of pay differentials by gender across myriad industries (13). Some researchers have questioned the statistical validity--even the very existence--of the gender-based bias suggested by these studies given the methodological ambiguities of defining "equal jobs," difficulties in performance measurement, "self-selection" effects, and gender segregation (14), which often leave the possibility for multiple interpretations. However, recent studies on gender-based differentials, which tightly control for labor attachment, field, rank, performance, seniority, and job characteristics have revealed similar gender-based pay and organization hierarchical level differentials, strengthening the soundness of previous findings within other organizational contexts (15).

Bamberger, Admati-Dvir, and Harel (16) used the comparative firm-level approach to study overall patterns of gender-based pay and organization hierarchical level discrimination. This type of analysis was chosen for several reasons: 1) firm-level analysis allowed control for contextual variables, such as industrywide conditions and employer operating procedures and policies (17); 2) firm-level comparison expedited the development of a new paradigm with specific criteria for pay payments, primarily variables that are not traditionally included in the salary equation used in composite studies, for

example: hierarchical position (18); and 3) many studies (19) have indicated that when researchers are careful to closely match firms' administrative and structural characteristics, and additionally, have matched institutional and geographic contexts, a firm-level, matched-sample strategy offers advantages over a more traditional research methodology involving the examination of economy- and industry-wide probability samples. This results in less likelihood of specification error.

The Bamberger, Admati-Dvir, and Harel (20) study also attempted to reveal empirical findings that indicated gender-based discrimination is manifested during the positioning of workers in the organizational context. Since an employee's organization hierarchical level has a major effect on salary, discriminatory practices in assigning these levels were suggested to be incorporated into future salary discrimination paradigms. Organizational variables have been shown to be more important than individual variables in exploring both legitimate salary differentials between women and men and gender-based salary discrimination; gender differences in job choice are often due to societal acculturation (21). Firm-level analysis facilitates the construction of a paradigm containing specific criteria for pay, especially variables not traditionally included in salary equation used in composite studies, such as organization hierarchical level (22).

The concept of information dependency uses a perspective based on this organizational power and influence. Concisely, information dependency theory addresses the role of the manager in distributing pay and organization hierarchical level. The theory suggests male job incumbents, more so than female job incumbents, are often perceived to be more powerful by these managers. Managers use, and often abuse, the reward system to manage their own dependencies on the more powerful job incumbents in order to escape potential retaliation from these individuals (23).

Information dependence theory suggests that the power of individuals in organizations, which influences pay and organization hierarchical level allocation decisions, is determined through four general categories of variables: organizational, subordinate, managerial, and environmental (24).

1. DEFINITIONS OF TERMS

Discrimination. Discrimination refers to the process of making a distinction in favor of or against a person on the basis of a prejudgment. Barriers to the articulation of pressure for gender-based pay and organization hierarchical level equality--stemming from information dependency and gender segregation--may limit the tendency of the manager to recognize and question this inequality in either or both the pay and organization hierarchical level structures (25).

Expectations. Expectations form a benchmark for performance measurement. In the context of gender-based pay and organization hierarchical level discrimination, expectations are generally said to be confirmed (26).

Disconfirmation. Disconfirmation is the cognitive process managers use to disconfirm expectations. Disconfirmation refers to the discrepancy between expectations and performance. The smaller the difference, the more neutral the information satisfaction and response. The larger the negative discrepancy (expectations greatly exceed performance), the lesser the degree of information satisfaction and response.

Legitimate Discrimination. The legitimate portion of the observed pay differential between women and men results from differences in characteristics known to affect worker productivity.

Illegitimate Discrimination. The illegitimate portion of the observed pay differential between women and men results from gender-based pay and organization hierarchical level discrimination. The literature suggests that an adequate estimate of the effect of the discriminatory component can be made by subtracting the legitimate portion from the total observed pay differential.

Comparable Worth. The effects of organizational variables on gender-based pay and organization hierarchical level differentials have been studied using the paradigm of comparable worth (27). Comparable worth can occur when managers perceive two or more different jobs to be equal in value. The literature stresses when two or more different jobs are indeed equal in value to a manager, the jobs should hold equal pay. However, little research has included organizational variables, and those that have treated these variables as given and regarded as discrimination only that portion of the observed pay difference between women and men not due to their different individual characteristics and organizational positions. For example, if both sexes have the same education, experience, and other relevant individual characteristics but hold different jobs within a firm, comparable worth would hold that they not receive disproportionate pay.

Researchers in numerous countries and varying industries and company sizes have concluded that the pay difference between the two sexes is not the result of discrimination, but of holding different job descriptions and titles. Therefore, the literature suggests the pay differences between the two sexes holding different organization hierarchical levels can be determined by the legitimate portion of the pay differential between women and men, in contrast to information dependency theory.

2. THEORETICAL FOUNDATIONS

2.1. INFORMATION DEPENDENCY

Favorable organizational conditions that may further discriminatory pay and organization hierarchical level may be more fully understood from an examination of an information dependency theory framework. "Favorable conditions" can be defined as asymmetrical gender sensitivities in a relationship between pay and organization hierarchical level satisfaction and pay and organization hierarchical level adjustments. Information dependency theory utilizes a perspective based on power and influence within the organizations. Pay and organization hierarchical managers may use the reward system in a discriminatory fashion to manage their own dependencies on the more powerful employees in order to achieve organizational goals, reach corporate missions, and avoid potential retribution from these workers.

The worker will be perceived by the manager as powerful when a position is occupied that provides scarce information to the organization and that individual is skillful at communicating to other organizational members that the success of the organizational performance is dependent on this information. When subordinates hold the same organization hierarchical level and that level is perceived to be powerful, that is, the firm is dependent on the subordinates for its realization of

organizational goals, differences in subordinate power may be explained by the individual's willingness to use their facility and the available power to achieve individual goals.

There can be variation in a subordinate's skill or willingness to provide believable information dependency threats to a manager. In this way, some subordinates may be perceived as more threatening to managers and organizations while others do not. An information dependency threat occurs when the manager perceives a threat to the control of scarce information resources by a subordinate. Pay and organization hierarchical level managers may handle information dependency threats from subordinates by increasing pay and organization hierarchical level differentials to subordinates whom they view as able to exert the most serious information dependency threats. The offsetting differential in additional pay and/or organization hierarchical level is made contingent on accepting the manager's conditions for providing the reward. In this way, managers may augment the pay and organization hierarchical level reward system to lessen dependency threats from powerful subordinates.

A wealth of literature substantiates the observation that information dependencies on subordinates vary considerably across managerial positions (28) and are primarily a result of subordinates controlling information resources. This control often extends to include performance capabilities that must be depleted in order for the manager to achieve priority organizational goals and missions (29).

When both pay and organization hierarchical level standard operating policies (SOPs) and management allow discretion in disbursement, the literature suggests that pay and organization hierarchical level allocations are positively related to the managers' dependence upon specific workers and the successful completion of the jobs the workers perform. Objective sources of information dependence, that is, characteristics of the actual situation surrounding the manager, include: 1) task uncertainty, 2) performance monitorship, 3) performance visibility, 4) specialized skills, 5) replaceability, 6) task centrality, and 7) organizational networks. Subjective sources that may also affect managers' perceptions of information dependency include: 1) self-esteem, 2) career goals, and 3) motivational needs. Information dependency is often precipitated by several factors: When information dependence is relatively high, but the threat of information dependence is low, then managers may be less likely to change a workers' pay or organization hierarchical level. When information dependence is relatively high and the threat of information dependency disturbance is high, managers may be more likely to be generous with both pay and organization hierarchical level changes (30).

2.2. GENDER SEGREGATION

Gender segregation--quite possibly an element of information dependency theory and one that impacts gender-based pay and organization hierarchical level discrimination--is simply defined as the selection of women and men into different jobs. The expanding body of literature has noted both the pervasiveness and expansiveness of gender segregation and has attempted to cite its origins (31). Many experts suggest that female-dominated jobs provide fewer opportunities for organizational mobility than male-dominated jobs (32). Additionally, it is noted that a review of the literature suggests a propensity for women to be concentrated in lower level positions; this may make women more vulnerable to repeated unemployment than their male counterparts (33).

Necessary conditions for gender segregation are gender-based pay and organization hierarchical level and pay decisions. When the gender of the employee systematically affects organizational pay and organization hierarchical level decisions, women often occupy primarily female-dominated jobs; men are more often concentrated in male-dominated jobs. Accordingly, gender segregation, at least in part, is then a component of many individual gender-based selection decisions as well. The effects of

gender-based organizational selection have been studied primarily from two perspectives, each using different research methodologies and at different levels of analysis (34). The first--the contextual approach--studies factors that determine variation in gender segregation across jobs, occupations, or firms (35). The second--the cognitive perspective--concentrates on how gender is factored into individual decision making on evaluating jobs for organization hierarchical level and pay (36). Although the cognitive method examines gender segregation only indirectly, it, too, has clear implications for segregation as a precondition for gender-based pay and organization hierarchical level discrimination.

In detailing the tradition of gender segregation, Auster (37) suggested that task characteristics influence the relationship between organizational context and individual pay and organization hierarchical level. Similarly, Cappelli and Sherer (38) argued that it is necessary to attempt to link organizational context to individual labor market outcomes (e.g., specific job assignments, pay, and organization hierarchical level). These internal labor markets limit the influence of external labor markets on a variety of outcomes, including pay and/or organization hierarchical level. Additionally, Baron and Pfeffer (39) argued that job titles and organizational categories as structural mediators between organizational context and individual labor outcomes are important to both gender segregation and bias in pay and organization hierarchical level studies. They suggested that although managers greatly impact both the creation and perpetuation of gender segregation, surprisingly little research has studied the effect of the manager's gender biases on pay and organization hierarchical level decisions.

The literature suggests that gender segregation is better understood for the *petite moyen* from an integrated cognitive and contextual approach--such approaches provide a more complete explanation of the sustaining and creating forces of gender segregation. Early cognitive research utilized investigation to determine whether gender affects the judgments of managers and produced inconsistent results. Cohen and Bunker (40), Rosen and Jerdee (41), Zickmund, Hitt, and Pickens (42) all reported that applicant gender does indeed affect managers' judgments, while the research of Renwick and Tosi (43), Sharp and Post (44), and Terborg and Ilgen (45) reported no effects on applicant gender.

Organizational context on gender segregation has also been widely explored, indicating contextual factors such as organization or workgroup gender composition influence gender segregation (46). However, this research does not provide a satisfactory explanation of the process through which contextual factors affect gender segregation. Some researchers have argued that gender composition of an organization may cause the gender of job applicants to be more heavily weighted by the managers (47). There is a paucity of research, however, of how gender influences either the peer or manager judgment processes. The summative result of many individual selection decisions is gender segregation; contextual factors alone provide an incomplete explanation for either the origination or maintenance of gender segregation unless contextual factors are expressly related to the cognitive processes and organizational selection decisions (48).

It should be noted that despite a modest decline during the 1970s, research reflects that the level of gender segregation today remains considerable (49). Other processes may affect gender segregation, however, although gender-based selection decisions are a necessary condition for gender selection. Reskin (50) suggested that gender segregation results from two processes: 1) internal: the self-selection, that is, women and men choose different jobs, and 2) external: organization selection. There is little evidence--either empirical or anecdotal--that the basic cognitive processes used in both types of selection decisions are different, although internal managers may have a different amount and type of information than those involved in external hiring (51). Managers may base their decisions on the ambiguous qualities of the job applicant and the degree to which their own are met (52). Managers within the same organization often show statistically high agreement regarding these prejudices of workers (53). The literature also attempts to explain gender segregation at the different levels of

organizational hierarchy. Researchers suggest that low-level gender predetermines segregation at higher organizational levels (54).

The substantial bulk of the literature focuses on organizational selection rather than self-selection and suggests that though gender segregation may contain elements of self-selection, it cannot be explained fully by self-selection, but can be applied to the *petite moyen* (55). It has been suggested that the female labor market behavior affects the manager's gender-based selection decisions in organizations. Investment in human capital is discouraged; the attachment of the labor force is weakened (56). The literature suggests that, because of this, gender-based decisions can often affect the self-selection processes of future job application. Also, it is often concluded from the evidence that altering organizational customs may be a more effective way to decrease gender segregation than undertaking to alter individual prejudices and bias given that gender differences in job choice are often due to societal acculturation (57).

CONCLUSION

Within the last few years, the growth in research regarding gender-based pay and organization hierarchical level discrimination has continued. Gender-based discrimination research relies heavily on information dependency theory literature devised to identify the power of individuals in organizations measured by what a person does in the organization and the skill of the individual in doing it. Additionally, gender segregation may be a component of information dependency. Gender-based literature suggests that women are more accepting of inequitable pay and that women report few feelings of personal deprivation or dissatisfaction with the pay they receive, even though they are aware of their own underpayment. The literature suggests that even women themselves often believe they are less deserving of the same pay and/or organization hierarchical levels as their men counterparts.

The impact of gender segregation on pay and organization hierarchical level differentials is evidenced in the influence of managers on these designations. It is also indicated through the degree of information dependence on subordinates and by threats to that information dependence. In illuminating gender-based discrimination, the issue of managerial discretion in pay and organization hierarchical level through information dependency theory was addressed. The impact of gender segregation on managers and labor market attainment was identified. Additionally, pay and organization hierarchical level as a means of managing dependencies and sources of information dependence were discussed. Finally, the role of information dependency threats in pay and organization hierarchical level allocation processes and implications of the information dependency perspective were highlighted. Though gender segregation literature argues that altering individual preferences is more difficult to achieve than organizational preferences, insights gained through this study may provide managers additional channels to both recognize and improve gender-based discriminatory policy and procedure within both the organizational and managerial contexts.

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Le Knowledge Management :

Principaux freins à la mise en place dans les PME Françaises

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RESUME

Le Knowledge Management peut se traduire en Français par le terme « gestion de la connaissance ». Par souci de simplicité, et compte tenu que nous faisons référence dans cet article à des travaux anglo-saxons, nous utiliserons le terme Anglais par la suite.

Le Knowledge Management est un des thèmes de recherche qui se développe le plus rapidement dans le domaine des technologies de l'information. L'environnement du monde des affaires devient de plus en plus imprévisible et évolue de plus en plus vite. Pour rester compétitives, toutes les entreprises, en particulier les plus petites, doivent apprendre à gérer toutes leurs connaissances et compétences. Le Knowledge Management est la capacité à créer, stocker, développer, mobiliser et à accéder rapidement à la connaissance. La technologie est le principal outil permettant la mise en œuvre du Knowledge Management. Pour atteindre réellement une aptitude à gérer sa connaissance, une organisation doit cultiver un environnement de travail qui permette le partage de la connaissance.

Dans la suite de cet article, nous nous intéresserons plus spécifiquement à l'approche des Petites et Moyennes Entreprises (PME) vis-à-vis du Knowledge Management. Après avoir rappelé brièvement les bases théoriques du Knowledge Management, nous essaierons en particulier d'identifier les atouts et les freins des PME pour mettre en place une démarche de Knowledge Management. Notre analyse couvrira notamment les notions d'organisation d'entreprise, de mode de management et de culture interne. Nous poserons a priori certains postulats sur le sujet, et nous nous appuierons sur des études de cas pour étayer notre propos. Nous essaierons enfin d'identifier les thèmes de recherche complémentaires qui pourraient s'imposer à l'issue de cette réflexion.

1. QUELQUES BASES THEORIQUES SUR LE KNOWLEDGE MANAGEMENT :

1.1. QU'EST-CE QUE LA CONNAISSANCE ?

La connaissance est un concept difficile à définir avec précision. Les philosophes l'ont étudié et ont essayé de la définir depuis des siècles. Tony Brewer, du Centre de Recherche Wentworth, définit la connaissance comme « une information qui, de par son caractère à la fois généraliste et pertinent, facilite la prise de décision et l'action » (Brewer, 1995). Il établit également que la connaissance existe sous deux formes, tacite et explicite (Brewer, 1995). La connaissance tacite est ce qui existe dans la tête d'une personne, mais qui n'a jamais été enregistré. Il est plus difficile de définir la connaissance explicite. On pourrait dire que la connaissance explicite est plus aisément articulée, et capable d'être documentée et classée. Elle est contenue dans les livres, les bases de données numériques, ou dans des notes écrites.

Traditionnellement, les entreprises se sont concentrées sur la connaissance explicite, et ont négligé l'importance de la connaissance tacite. Cette tendance est en train de changer. On estime que seulement 10 à 20 % de l'information contenue dans une entreprise devient explicite et accessible depuis un ordinateur. Cela laisse 80% de connaissance tacite dans la tête des employés (Tobias, 2000). Pour que le Knowledge Management devienne une pratique efficace dans une organisation, celle-ci doit être capable de faire basculer ses connaissances de l'un à l'autre des deux états.

Tony Brewer (1995) a également identifié quatre types de connaissance de plus en plus précises :

- Knowledge-off est la connaissance la plus superficielle, directement dérivée de l'expérience ;
- Knowledge-that provient de la logique et de l'observation analytique ;
- Knowledge-how est lié à l'expérience professionnelle, par exemple réaliser une tâche. Elle peut être procédurale, Par exemple savoir faire cuire un œuf, ou intuitive, par exemple savoir faire du vélo;
- Knowledge-why est la connaissance la plus profonde, qui passe par l'acquisition d'une compréhension à partir de l'expérience et de la réflexion.

business et des réseaux intranet a créé une opportunité sans précédent pour que les individus du monde entier puissent communiquer et échanger de la connaissance instantanément. Le socle sur lequel le d'un Knowledge Management moderne repose est la technologie. La technologie constitue le lien entre les hommes et les processus pour que ceux-ci puissent valoriser la connaissance de l'organisation (Hyde & Mitchell, 2000).

- La culture interne : La plupart des experts citent la culture comme un des facteurs du Knowledge Management les plus difficiles à maîtriser. Beaucoup d'entreprises n'ont pas une culture interne permettant le partage de la connaissance. Pour que les projets de Knowledge Management puissent réussir et devenir opérationnels, la direction des entreprises doit cultiver un environnement dans lequel les salariés sont intéressés au partage de la connaissance. L'essentiel dans une bonne culture organisationnelle est que les solutions apportées aux problèmes soient partagées pour que les mêmes problèmes ne doivent pas être résolus à nouveau lorsqu'ils réapparaissent. Il s'agit ici de « ne pas réinventer la roue une deuxième fois ». La culture doit également inciter les salariés à admettre l'idée qu'il y a un bénéfice tant pour l'organisation que pour l'individu à participer au processus de partage de la connaissance.
- Le Knowledge Management est directement relié à la capacité d'une organisation à utiliser de manière effective ses ressources en matière de connaissances. Beaucoup d'entreprises disposent de grandes quantités de données brutes et d'expériences opérationnelles comme les bases de données, la messagerie électronique, des documents informatiques, des rapports, et le cerveau de ses salariés. Malheureusement, accéder à ces ressources et les transformer en supports utilisables n'est pas toujours chose aisée. Souvent les systèmes de stockage de données se transforment en cimetières de données inexploitable ; ces systèmes de stockage ne permettent par ailleurs pas de stocker la connaissance tacite. On a alors besoin d'un système de Knowledge Management pour gérer l'information, et s'assurer que l'on peut y accéder rapidement pour que des actions adaptées puissent être mises en œuvre.

1.3. QUELLES SONT LES PRINCIPALES DIFFICULTES LIEES AU DEVELOPPEMENT DU KM ?

Le problème avec la connaissance requise pour prendre des décisions d'entreprise est qu'elle ne réside jamais dans une seule personne. Si cette connaissance existe, elle est dispersée à travers l'organisation et partiellement maîtrisée par de nombreux salariés. (« Knowledge Management, » 2000). A titre d'exemple, dans un hôpital, des médecins de différentes spécialités sont capables de couvrir différents thèmes de recherche ou de pratiquer différentes interventions chirurgicales, mais il n'y a aucun médecin expert dans tous les domaines. Il existe de nombreux facteurs limitatifs qui déterminent les frontières de la connaissance d'une personne. Parmi ces facteurs, on peut citer l'expérience, la formation et l'intelligence. Plus l'activité d'une organisation sera complexe et diversifiée, plus la connaissance nécessaire à son fonctionnement sera éclatée entre des unités plus petites (« Knowledge Management, » 2000).

Si une organisation veut relever le challenge de cette nouvelle économie de la connaissance, elle doit comprendre que la manière gérer les affaires est en pleine évolution. Les partenaires industriels, les fournisseurs et les consommateurs coopèrent souvent, et échangent leurs connaissances et savoirs faire. Les systèmes d'information sont tellement imbriqués qu'il est difficile de dire où se situe la frontière entre deux entreprises. Certaines entreprises ont compris qu'il était de leur intérêt de collaborer avec d'autres entreprise qui peuvent être des alliées dans certains marchés, et des concurrentes dans d'autres marchés. Ce phénomène est appelé « co-opétition » (Oxbrow, 2000).

Les systèmes de management et de contrôle rigides ne vont pas survivre dans la nouvelle économie de la connaissance. Les entreprises qui connaîtront le succès devront s'attacher à développer la flexibilité et la réactivité dans un environnement de compétition dynamique. Les entreprises devront être organisées en réseaux, avec un bon système de communication et de partage de la connaissance. Il sera très important de mobiliser les meilleures compétences et expertises de l'entreprise pour venir à bout des projets le plus difficiles.

2. LES SPECIFICITES DES PME FACE AU KM :

2.1. LES POINTS FORTS DES PME FAVORISANT A PRIORI LA MISE EN PLACE DU KM : LA STRUCTURE INTERNE DES ENTREPRISES.

Selon la classification établie par la recommandation de l'Union Européenne du 03 Avril 1996, une PME est une entreprise de moins de 250 salariés. On distingue quatre types de PME : les très petites entreprises (TPE), de 0 à 19 salariés, les petites entreprises, de 20 à 49 salariés, et l'entreprise moyenne, de 50 à 249 salariés.

On voit bien à travers cette classification que les PME sont des entreprises de taille réduite, et cette taille de structure a des répercussions sur l'organisation interne et les processus de prise de décision et de partage de l'information. Si l'on s'intéresse aux facteurs clés qui influencent le partage de l'information, on peut identifier les points suivants :

- Un nombre de sites réduit : Les salariés d'une PME sont souvent géographiquement regroupés sur un petit nombre de sites, voire sur un seul site pour les TPE. Cette concentration géographique des salariés est un facteur positif permettant un contact direct quotidien entre les salariés ; elle facilite donc a priori la circulation de l'information et de la connaissance.
- Une taille de structure limitée : le petit nombre de salariés dans l'entreprise permet l'identification rapide de chaque salarié par ses collaborateurs directs et indirects, et donc un accès plus rapide à l'information détenue par chaque salarié. Tout nouveau salarié d'une PME rencontre en général l'ensemble des collaborateurs de l'entreprise dans les premiers jours qui suivent sa prise de fonctions, et peut par la suite les solliciter directement pour obtenir l'information dont il a besoin pour accomplir sa mission.
- Une organisation des fonctions simplifiée : Les PME, du fait de moyens financiers limités, vont concentrer leurs efforts sur un petit nombre de fonctions vitales pour le fonctionnement de l'entreprise, essentiellement la production et la vente, les services fonctionnels comme la comptabilité complétant la structure. Cette concentration des fonctions entraîne une concentration de la connaissance tacite dans quelques cerveaux clairement identifiés, et permet donc un accès plus facile à la totalité de l'information et de la connaissance de l'entreprise. On peut schématiser cette différence d'organisation en reproduisant les organigrammes types d'une PME et d'une grande entreprise.

La PME :

En charge de :	- Développement	- Marketing	- Comptabilité
	- Achats	- Commercial	- Finance
	- Production	- SAV	- GRH
	- Logistique		

La Grande Entreprise :

Pour étayer notre propos, nous prendrons l'exemple d'une TPE. Cette entreprise, basée dans le sud de la France, est spécialisée dans l'abattage et la transformation de volailles. Elle réalise un chiffre d'affaires d'environ 1 Million d'Euros par an. Elle vend environ un tiers de sa production à la Grande Distribution locale, et les deux tiers restant à des petits clients autonomes majoritairement basés dans le Béarn (boucheries, rôtissoires, établissements de soins publics ou privés...).

L'ensemble de la structure est regroupée sur un site, dans lequel on trouve la production (5 personnes) , le responsable commercial, et une comptable. Elle emploie au total sept salariés, y compris le gérant de la structure. Les trois actionnaires de l'entreprise (également dirigeants) sont les enfants du fondateur, deux frères et une sœur. L'un des deux frères est responsable de la production, l'autre s'occupe du commercial, la sœur étant chargée de la comptabilité et des commandes aux fournisseurs.

Lorsqu'on observe le fonctionnement quotidien de l'entreprise, on constate les phénomènes suivants :

- Les trois enfants du fondateur peuvent se suppléer les uns les autres : L'aîné de la fratrie, normalement en charge du commercial, connaît parfaitement le fonctionnement de la production. Il peut donc remplacer le benjamin de la famille qui assure l'abattage et la transformation. Il peut aussi au besoin prendre des commandes et émettre les factures, tâches normalement gérées par la cadette, ou passer commande à son fournisseur de volailles. Ceci est rendu possible par l'origine commune des trois dirigeants, qui ont vécu toute leur vie dans ce milieu, et qui ont été formés « sur le tas » par leur père, fondateur de l'entreprise. A ce titre, on peut dire qu'il y a eu transmission de connaissance d'une génération à l'autre, qui permet aux dirigeants actuels d'être compétents dans leur domaine.
- Etant physiquement présents sur le même site, les trois dirigeants échangent en permanence des informations sur les problèmes opérationnels quotidiens (livraisons de volailles en retard, qui vont entraîner un retard dans les livraisons aux clients, panne de tel réfrigérateur, qui doit être condamné le temps qu'il soit réparé, commandes urgentes qui doivent être livrées dans des délais hors normes, qui vont entraîner par exemple la nécessité de planifier une production pendant le week-end, etc...). Ils ont d'ailleurs systématisé cet échange d'informations lors d'une réunion de briefing organisée tous les jours en début de matinée, qui leur permet d'être au même niveau de connaissance sur un problème donné, et donc de traiter ce problème dans sa totalité même si les autres dirigeants sont ponctuellement absents de l'entreprise. Les décisions plus stratégiques (tarification clients, lancement de nouveaux produits...) sont également prises en commun, après partage de l'information entre les trois dirigeants.
- Ils sont capables d'une grande flexibilité, tant en termes de temps de travail, que d'évolution de la production ou, comme vu plus haut, de responsabilité opérationnelle.

On voit donc à travers cet exemple que les PME, de par leur structure même, sont a priori naturellement tournées vers la démarche de knowledge management.

Pourtant, nous allons voir dans la suite de l'article qu'un certain nombre de facteurs propres aux PME peuvent constituer des freins à la mise en place d'une logique de knowledge management.

2.2. LES POINTS FAIBLES DES PME FREINANT LA MISE EN PLACE DU KM :

Le premier de ces facteurs est lié à la culture interne d'entreprise, clairement initiée dans les plus petites entreprises par le chef d'entreprise. A travers les exemples de PME que nous avons étudiés pour rédiger cet article, il nous apparaît que le problème est d'autant plus flagrant dans les entreprises dirigées par le fondateur historique de l'activité, qui joue véritablement le rôle d'un « homme-orchestre » dans la structure.

C'est lui qui a développé la vision de départ à la base de la création de l'entreprise. Lui encore qui disposait du savoir-faire nécessaire à l'origine pour faire fonctionner l'organisation. Lui enfin qui a pris les risques humains et financiers qui ont permis de passer de l'état de projet à celui de réalité concrète.

Il se caractérise souvent par une forte personnalité, un goût prononcé par une forme de management assez directive, et il privilégie souvent un mode de transmission de l'information vertical, même après que l'entreprise se soit développée et ait commencé à intégrer des compétences externes pour faire face à sa croissance. Cette vocation centralisatrice peut être liée dans certains cas à la volonté de maintenir un pouvoir absolu sur l'organisation, et s'oppose alors à toute forme de délégation d'autorité auprès des salariés les plus méritants. Se met alors en place un circuit de transmission d'information et de connaissance centralisé que l'on peut décrire par le schéma ci-dessous :

On voit bien dans ce schéma que l'information circule de manière verticale, et que le seul point de rencontre de la connaissance commun à l'ensemble de l'organisation est le dirigeant lui-même. La bonne circulation de l'information repose dès lors sur ses seules épaules, et seule son analyse personnelle, elle-même dépendant de sa compétence, de sa sensibilité personnelle, et de sa disponibilité intellectuelle, peuvent permettre de transmettre l'information de manière transversale et en temps voulu.

Cette situation nous paraît particulièrement bien illustrée par l'exemple d'une PME Landaise, au cœur de la région Sud-Ouest. Cette société est spécialisée dans la découpe et le collage de panneaux de toutes matières. Elle réalise des cloisons pour le bâtiment, des tableaux effaçables pour la grande distribution ou le marché des objets publicitaires, ou encore des personnages en mousse destinés à l'animation des vitrines de magasins aux abords des fêtes. Elle réalise un chiffre d'affaire annuel d'environ 2 millions d'Euros, et emploie une dizaine de personnes, dont neuf à la production, et une secrétaire chargée des travaux administratifs courants, plus quelques travailleurs temporaires en période de pointe d'activité. Le dirigeant de cette société est un ingénieur d'une cinquantaine d'années, qui a développé et mis au point un procédé de façonnage permettant une découpe et de collage très précis de divers matériaux, procédé qui a été à la base de la création de son entreprise.

Lorsqu'on rentre dans cette entreprise, on est immédiatement frappé par le caractère vertical de l'organisation mise en place. Le gérant est sans cesse interrompu dans ses entretiens par des coups de téléphone de clients qui n'ont que lui pour interlocuteur dans l'entreprise, mais aussi par des visites impromptues de tous ses collaborateurs qui viennent sans cesse le solliciter pour régler tel ou tel problème technique, savoir où tel dossier a été rangé, ou encore vérifier le libellé exact d'une facture. Il forme lui-même ses nouveaux salariés ou travailleurs temporaires, prépare tous les devis clients,

visite seul ses clients ou prospects, assure la réception et le contrôle des matières premières, et formalise tous les processus de production sous la forme de fiches de postes placardées à différents endroits dans l'entreprise. Tous ses ouvriers sont au même niveau hiérarchique, alors que certains, disposant d'une grande ancienneté, pourraient aisément jouer le rôle de contremaître et donc le décharger d'une partie de ses responsabilités de production.

Etant très compétent dans le domaine technique, il commet peu d'erreurs, et son entreprise fonctionne de manière tout à fait satisfaisante. Nous avons pourtant été témoins d'un événement qui nous a montré qu'il pourrait gagner en efficacité en autorisant un partage de l'information plus transversal. Lors d'une de nos visites, il nous a dit avoir des difficultés avec la mise en place d'un système informatique destiné à gérer sa facturation et son fichier clients. Etant peu familier avec l'outil informatique, et par ailleurs très pris par ses nombreuses responsabilités, il négligeait de remettre à jour ses fichiers clients. Or, une commande urgente prise par téléphone et confirmée par un fax envoyé par le Gérant, n'a pas été saisie dans le système informatique. La production n'ayant pas été informée de cette commande, aucun planning de fabrication n'avait été mis en place. Pire encore, lorsque le fournisseur de matières premières est venu livrer, (en l'absence du Gérant, alors en prospection commerciale), personne n'a été capable de réceptionner la marchandise. Au bout du compte, le client n'a pas été livré dans les délais, ce qui a entraîné un conflit commercial important.

Une procédure transversale simple aurait permis d'éviter ce problème, et serait de nature à partager la connaissance de manière plus rationnelle entre les différents salariés de l'entreprise.

Le deuxième facteur propre à certaines PME est lié à l'utilisation partielle de la technologie, et plus particulièrement de l'outil informatique. Selon une étude réalisée en 2002 par BNP-Paribas Lease Group, la quasi-totalité des PME Françaises sont équipées en micro-informatique, 88% ont une connexion internet (41% une connexion à haut débit), 52% possèdent un site web, et 73% utilisent couramment la messagerie électronique. Il semble donc a priori que le PME se soient familiarisées avec la bureautique. Or, parallèlement à ces données encourageantes, la transmission d'information se fait malgré tout encore de manière orale, et peu de traces écrites sont conservées d'un problème passé, et des modes de résolution mis en œuvre. Autrement dit, l'outil informatique existe et est utilisé régulièrement, mais les PME n'en utilisent pas toutes les capacités. La connaissance reste donc tacite, et souvent limitée à quelques salariés qui ne maîtrisent qu'un domaine d'intervention limité. En l'absence de procédures systématiques de transmission de l'information et de la connaissance, les connaissances restent stériles, et il n'est pas rare de voir ces entreprises se retrouver confrontées à plusieurs mois d'intervalle à des problèmes récurrents, qui nécessitent beaucoup de temps et d'énergie pour être résolus à nouveau. Ce phénomène est lié d'une part au manque de temps dont disposent les salariés pour organiser et formaliser la connaissance acquise, mais aussi au fait que la technologie informatique n'est utilisée que partiellement, pour répondre aux besoins les plus urgents, et non pour constituer une base de données évolutive de la connaissance de l'entreprise.

A titre d'exemple, nous nous appuyons sur un dysfonctionnement relevé au sein d'une PME Béarnaise d'une cinquantaine de salariés, réalisant environ 10 millions d'Euros de chiffre d'affaire annuel, spécialisée dans la distribution d'articles de sécurité (alarmes, feux de signalisation, sirènes, systèmes de l'homme mort...) destinés aux entreprises industrielles. Cette société importe, assemble et distribue des systèmes de sécurité selon des cahiers des charges propres à chaque entreprise cliente. Une partie de son activité provient de produits standards, qui ne nécessitent pas de remise en question fondamentale à chaque commande, et peuvent donc être traités sur catalogue, avec une grille tarifaire unique, tandis que le reste de l'activité porte sur de l'assemblage « à façon » répondant à certaines configurations spécifiques des clients, et nécessitant à ce titre un véritable développement différent d'un client à l'autre. Dans ce deuxième cas de figure, chaque appel d'offre entrant fait l'objet d'un circuit de développement en interne différent pour chaque client, avec identification du coût matière et assemblage, calcul d'un prix de revient unitaire, application d'une marge financière sur la commande et transmission au client. Le dossier est géré successivement par plusieurs services : le service commercial qui prend note du cahier des charges, le service technique qui interroge ses fournisseurs sur les coûts matières et le coût d'assemblage, le service commercial à nouveau qui calcule le coût de transport, la direction générale qui décide du coefficient de marge appliqué, et enfin le service commercial qui transmet l'offre au client. Toutes ces opérations sont faites manuellement, l'informatique ne servant qu'à mettre en forme la proposition commerciale finale. Il en résulte une perte de temps pour l'ensemble de l'organisation, et un délai de réponse trop long vis-à-vis du consommateur. Il nous apparaît dans ce cas qu'une base de données fournisseurs, couplée avec un historique des commandes clients, pourraient permettre de traiter plus rapidement la demande, le service technique et la direction générale n'intervenant plus que pour valider une proposition déjà formatée par le service commercial.

Parallèlement à cette absence de mise en forme technique de la connaissance disponible dans l'entreprise, on peut également noter que peu de PME ont accès aux bases de données qui fleurissent actuellement en France : Bases de données clients ou prospects (Kompas, Diane), bases de données donnant accès des études de marché en ligne (Xerfi), ou encore bases de données de produits innovants (Boomer) et autres sociétés de veille concurrentielle (XTC) ; toutes ces ressources / relais d'information sont disponibles pour toute entreprise désireuse de compléter sa connaissance des marchés. Ces bases de données sont accessibles sur abonnement, mais rares sont les PME qui en connaissent l'existence, et encore plus rares celles qui peuvent ou souhaitent financer ces solutions, l'achat de ressources informatiques étant encore trop souvent considéré comme un luxe non prioritaire pour l'entreprise.

La priorité donnée aux préoccupations opérationnelles est un autre facteur freinant la mise en place du Knowledge Management. Les TPE en particulier sont des entreprises qui vivent quasiment au jour le jour, leurs préoccupations essentielles étant de vendre, produire, facturer et enfin encaisser le plus rapidement possible pour assurer leur survie. Dans cette course quotidienne au chiffre d'affaire, il reste peu de temps pour la réflexion, la prise de recul, l'échange et la formalisation de processus de fonctionnement. On résout les problèmes au fur et à mesure qu'ils se posent, souvent sans faire appel à l'expérience acquise, et l'on assiste à un repliement sur soi de chaque salarié qui ne pense plus qu'à traiter ses propres urgences.

Nous reprendrons l'exemple de l'abattoir de volailles déjà étudié dans cet article dont nous avons pourtant vu en première analyse qu'il était organisé pour faire circuler l'information régulièrement et rapidement. Cette société a fait appel il y a quelques temps à un consultant extérieur pour l'aider à mettre en place une politique commerciale performante. Le consultant s'était en particulier attaché à développer une grille tarifaire assez complexe, puisque portant sur des produits différents et des marchés différents, aux potentiels très inégaux. Pour optimiser la grille tarifaire, le consultant avait sollicité les personnes responsables de la comptabilité et du service commercial, en leur soumettant une proposition de grille établie en fonction d'une part des seuils de rentabilité par produit, et d'autre part des seuils d'acceptabilité par marché. Classiquement dans ce genre de situation, le comptable

réclamait des prix plus élevés pour améliorer la marge unitaire par produit, tandis que le responsable commercial souhaitait les prix les plus compétitifs possibles pour faciliter la vente. Le consultant a réussi à concilier globalement ces deux objectifs à travers une grille tarifaire définitive qu'il a remise à l'entreprise. Celle-ci n'a fait aucun commentaire lors de la restitution de la mission. Quelques semaines après cette échéance, l'entreprise a recontacté le consultant pour lui demander de retravailler sa grille, arguant que de nouveaux éléments étaient intervenus dans le dossier, qui rendaient caduc le travail du consultant. Après analyse de la situation, il s'est avéré que le responsable commercial avait oublié de dire au consultant qu'il pratiquait déjà des prix plus bas (que ceux prévus dans la grille tarifaire) chez certains clients, tandis que la comptable avait omis de préciser qu'elle avait été informée d'une augmentation à venir de cinq pourcent de ses prix d'achats en matières premières. Etonné que des informations aussi cruciales pour son travail n'aient pas été mentionnées plus tôt par les deux responsables, le consultant s'est vu répondre qu'il était intervenu en période de point d'activité, durant laquelle les deux responsables n'avaient pas de temps à consacrer à autre chose que l'opérationnel quotidien, et qu'aucun des deux n'avait eu la disponibilité intellectuelle nécessaire pour réagir aux propositions du consultant. Comme par ailleurs aucun état informatique exhaustif n'était tenu à jour, tant du point de vue commercial que du point de vue comptable, le consultant n'avait pas pu déceler à temps les incohérences contenues dans sa proposition.

2.3. LES FACTEURS ENVIRONNEMENTAUX FAVORISANT LE DEVELOPPEMENT DU KM

Les normes ISO (International Standard Organization) obligent les entreprises à formaliser leurs processus, à identifier les fonctions clés détentrices de l'information, et à organiser les flux d'informations au sein de l'entreprise. Initialement développées par les grandes entreprises, ces normes ont petit à petit essaimé vers les PME sous-traitantes sous la pression de leurs grands donneurs d'ordre, avant de devenir une norme de qualité répandue à l'ensemble des entreprises. Ces normes ne sont pas la preuve d'un zéro défaut, (même si les plus récentes intègrent la notion de satisfaction du consommateur), en revanche, elles indiquent clairement que l'entreprise a développé des processus de fonctionnement internes leur permettant d'identifier rapidement la cause d'un incident qualité, et une procédure permettant de mettre en œuvre les actions correctrices nécessaires à la résolution du problème.

Lorsqu'on analyse plus en détail le fonctionnement d'une entreprise sous norme ISO, on constate que ces normes sont garantes d'un meilleur partage de la connaissance et de la décision au sein de l'entreprise.

Par exemple une entreprise souhaitant développer un nouveau produit devra communiquer cette information à tous les services concernés par la décision, à travers la transmission d'une note qui devra effectuer un circuit de signatures au sein de l'entreprise. Dans le cas d'un lancement de produit nouveau, le Marketing va émettre une note interne détaillant le type de produit vendu, le conditionnement, le site de production, le tarif mis en œuvre... Cette note devra être visée par la production, la finance, le commercial, la direction générale, et enfin le responsable assurance qualité. Si l'une des signatures manque, le lancement ne peut être effectué, ce qui oblige l'ensemble de l'entreprise à se mettre d'accord sur la décision prise.

De cette manière, on s'assure que l'ensemble de l'entreprise connaît l'information, et que chaque service a intégré l'impact de la décision sur son propre fonctionnement.

3. LES THEMES DE RECHERCHE POSSIBLES PERMETTANT D'APPROFONDIR LA QUESTION

Comme on a pu le voir dans les exemples qui précèdent, les PME françaises n'ont pas encore intégré l'intérêt et les exigences liées à la mise en œuvre d'une démarche de Knowledge Management. Les freins sont multiples, et la plupart portent sur la culture de l'entreprise, elle-même liée à l'impulsion donnée par le chef d'entreprise. Ils sont particulièrement présents dans les plus petites entreprises (les TPE), qui, faute de moyens humains et financiers, gèrent au jour le jour leur activité plutôt que de prendre le recul nécessaire pour gérer la connaissance interne et externe.

Pour analyser plus en détail la pertinence des postulats faits à travers cette étude, plusieurs études complémentaires nous paraissent pertinentes :

3.1. L'APPROCHE QUANTITATIVE :

Quel est le pourcentage d'entreprises Françaises qui ont mis en place une démarche de KM ? A partir de quelle taille les PME s'intéressent-elles au KM ? La mise en place du KM dépend-elle du secteur d'activité de l'entreprise ? L'objectif d'une étude de ce type serait d'identifier les critères clés qui génèrent la mise en place d'une démarche de Knowledge Management. Sur le plan historique, il serait également intéressant de vérifier si la pratique du Knowledge Management est en progression dans les PME, ou si ce principe reste inconnu des entreprises.

3.2. COMPARAISON ENTRE LES ENTREPRISES PIVEES ET LE SECTEUR PUBLIC :

Là encore une étude quantitative permettrait de montrer les divergences existant entre un secteur privé lancé dans une course aux résultats, et un secteur public financé par la richesse nationale, et donc peut-être moins sensible à la pression du résultat. L'autre distinction pourrait porter sur les différences entre les missions de ces deux secteurs. Côté privé, il s'agit d'être rentables pour assurer le développement de l'entreprise, côté public, il s'agit de mettre en œuvre des procédures fiables pour évaluer, organiser, et réguler l'activité économique. Ces différences de culture aboutissent à une vision différente de l'organisation et des processus de travail, et peuvent se traduire par une perception différente de l'importance et de la pertinence du Knowledge Management.

3.3. COMPARAISON ENTRE DIFFERENTS PAYS :

Enfin, il nous paraît intéressant d'aborder le problème sous un angle plus macro-économique, qui s'intéresserait à la culture économique des pays, et non plus des entreprises. Peut-on comparer un modèle d'entreprise Français historiquement étatique avec un modèle Anglo-Saxon résolument libéral, ou un modèle Italien plutôt familial ? Comment les entreprises de chaque pays gèrent-elles la connaissance interne ? Existe-t-il des contraintes supranationales communes à toutes les entreprises qui prennent le pas sur les différences de cultures locales ?

CONCLUSION

Le Knowledge Management est une préoccupation aussi vieille que l'humanité. Récemment projeté sous les feux de l'actualité par la complexification croissante de la gestion des entreprises, elle-même liée à la rapidité d'évolution de leur environnement, ce thème constitue aujourd'hui un enjeu majeur pour les entreprises. Les PME semblent avoir du mal à appréhender les contraintes propres au développement de cette démarche, faute de temps, de moyens humains et financiers, et surtout en raison d'un manque de prise de conscience de l'importance de la connaissance pour toute entreprise. Le Knowledge Management s'appuie sur un changement de culture en profondeur des entreprises, d'autant plus difficile à mettre en œuvre qu'il nécessite une remise en question profonde des notions de hiérarchie et de pouvoir. Seules les entreprises ayant perçu l'importance de cette révolution pourront s'adapter à la nouvelle donne de l'économie mondiale.

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