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Organizational Mental Map and Conative Competences

Darko Kovač¹, Andrej Bertonec²

¹Vocational College for Catering and Tourism Bled, Prešernova 32, 4260 Bled, Slovenia, darko.kovac@s5.net

²University of Primorska, Faculty of Management Koper, Cankarjeva 5, pp. 345, 6104, Koper, Slovenia, andrej.bertonec@fm-kp.si

Employees with their knowledge, skills, behavior and personal traits impact the organizational learning. The concept of organizational mental map and conative competences, as inborn underlying characteristic that is influenced by employees being involved as well as endogenous and exogenous factors, is presented. Three Slovene small to mid-sized companies were studied in respect to the individual factors, especially conative competences, of their employees. The study suggests that conative side of mind and thus conative competences can actually influence the organizational learning. What matters in contemporary management practice is how hidden potentials are set free and how they intrinsically motivate employees according to their personal differences in capabilities. As conative competences are inborn and can not be learned but only encouraged, contrary to cognitive competences, it is important to better understand employees' personal traits.

Key words: organizational learning, SME, conation, conative competences, organizational mental map

1 Introduction

Learning has been coherent to human beings from the ancient times. It depends not only on the process of socialization, first in the family and then later on in school, at work and other forms of social encounters, but also on personal characteristics. Nowadays, is the organizational learning becoming one of the most important contemporary managerial concepts.

Organizational capacity of learning is based on the combination of many factors. Besides exogenous factors, i.e. social, cultural and economic environment and endogenous factors, i.e. relationships within organization, also the individual factors, i.e. personal traits of employees have influence on the organizational capacity of learning, learning outcome and corporate performance. It is argued that this is even more important in post-transition economies, because they face, after market liberalization, many previously unknown challenges of increased competition and unprecedented changes in culture and social life.

The purpose of this paper is to develop a better understanding of organizational learning and personal traits in post-transition economy of Slovenia. It is focused on the personality of employees within studied organizations rather than the concept of learning organization itself. The paper aims to answer the question whether all competences can be learned or some inborn competences already exist. Non-teachable attributes of employees, i.e. personal traits embedded in conative competences are investiga-

ted and the model of conative competences which aims to explain the impact of individuals on the organizational learning capacity is introduced.

The paper is structured as follows: first to establish the conceptual basis that guide the study and then it is tested empirically on a sample of companies. Finally, the results are discussed, pointing out the main limitations of the study and indicating possible future lines of research.

1.1 Objectives of the study

The main objective of this study is to analyze employees' non-teachable personal traits in small and medium sized enterprises in the post-transition economy of Slovenia and their influence on organizational learning. Research question which is dealt in this study is influence of individual factors and in particular inborn personal traits on organizational learning hence we analyzed the existence and influence of individual factors and in particular inborn personal traits on organizational learning. Moreover, we study employees' skills, knowledge and behavior which are clustered in a model of competences. Thus the model of organization mental map was contrived. The proposed model of competences is based on tripartite dichotomy of mind: cognitive, behavioral and conative competences, all being a part of organizational mental map. The conative competences of all employees in the sample are measured with the Kolbe A™ Index and

results compared to their job-related self-expectations measured by Kolbe B™ Index.

Hypothesis was set:

H: conative competences as a part of organizational mental map vary in different organizations.

2 Organizational learning

The concept of organizational learning is not new and the purpose of this article is not to clarify differences between the concept of organizational learning and related concepts of learning organization, knowledge management, and organizational knowledge. Reader is referred to Easterby-Smith and Lyles (2003) who provide a comprehensive and systematic mapping of the area and differentiate among the four terms. Organizational learning is engaged with the studies of learning processes of organizations, learning processes within and between organizations, hence the learning organization is considered as a form of organization - an entity.

De Geus (1988) claims that the ability to learn faster than your competitors may be the only sustainable competitive advantage. The concept of single-loop and double-loop learning was introduced; single-loop learning happens when errors are corrected through a feedback loop, and double-loop learning is cognitive and means development of principles that may inform and determine future organizational behavior and lead to new ways of doing business hence it goes beyond the immediate solution (Argyris, 1977, 1992; Argyris and Schön, 1978). Sengežs (1992) concept of adaptive learning is centered on evolutionary changes in response to developments in the business environment which are necessary for survival of organization. On the other hand, generative learning means building new competences or identifying and creating opportunities based on leveraging existing competences. Huber (1991) sees that as a combination of four processes: information acquisition, information distribution, information interpretation, and organizational memory.

In experiential learning, the Kolb model (1984) is widely used. Concrete experience (receptive modality), reflective observation (perceptual modality), abstract conceptualization (cognitive modality) and active experimentation (behavior modality) are elements of Kolbžs learning cycle. Knowledge, behavior, and effective side are considered.

In fact, learning is both organizational and individual, the former relying heavily on the latter (Kamoche, 1997). Learning arrangements that exist within the organization influence individual learning and they can accelerate or slow down the learning process. These arrangements for learning are called "organizational context" (Stonehouse and Pemberton, 1999) and should be considered in individual learning as well.

Lam (2001: 213) decomposes the process of learning in organizations in: getting information, distribution of information, interpretation of information, and flowing of shared and interpreted information into organizational memory. Senge (1992) introduces the concept of mental

model and personal mastery. When individuals consolidate their personal mental models into a systematic thinking by realigning personal beliefs, values and behaviors into shared representations of reality, then it becomes a public forum. It happens through dynamic and collective experimental learning. Individualistic orientation is slowly giving way to shared vision and team learning; however, intrinsic personal differences in capabilities and motivation make the difference. According to Lam (2001: 214) different individuals in the organization may be appealing to different types of knowledge acquisition. Most find new insights from past experience helpful in their search for fresh references. They may also engage in trial and error experimentation to locate the best possible way of handling new situations.

Organizations have according to Hegberg (1981: 6) conscious systems and memories. Hegberg (1981) likens it to human beings, so he claims that organizations can change and develop their personalities, habits, beliefs, and ideologies over time. He claims that organizational memories preserve certain behaviors, mental maps, norms, and values. So, do individuals adapt or do they still bear some unchangeable personal traits and which are they? And if there are some inborn personal traits how stressful is for individuals to adapt? Is the behavior stored in organizational memory in contradiction to their own?

2.1 Conative competences

Organizations strive for committed employees who identify themselves with organizational challenges and expect from them to have attitudes, personal traits and values which ensure commitment and identification. Without that commitment, much of the learning, especially at the group level, cannot take place (Ashton, 1998). Intuitively, the competence concept is closely connected to organizational learning.

The competence concept was investigated by many authors (Ellström, 1997; Ulrich, 1998; Mansfield, 1999; Miller et al., 2001; Jacobs and Pons, 1993; Deakins and Freel, 1998, Christensen, 1998; Downes and Mui, 1998). Drejer (2000) perceives organizational core competences as a dynamic concept due to inherent disruptive changes which can be "competence-destroying" as well as company-destroying. Drejer (1996) further reasons the dynamics of core competences' changes in the product-market strategy. Drejer and Riis (1999, 2000) define the competence as consisting of four elements and their relations - technology, people, organizational structure and organizational culture.

OECD (2000: 67) definition of competences focuses on functional approach which places complex demands at the forefront of the concept. According to this viewpoint, competences are structured around demands and tasks. However, defining types of competences in more detail would go beyond the purpose of this paper. The reader is referred to Draganidis and Mentzas (2006) for further information.

Focus of this paper are not functional competences, often linked with occupational standards, but personal competences. We use the division of competences into behavioral (“soft”) competences and technical or functional (“hard”) competences (Miller et al., 2001). It is claimed that hard competences combine skills and knowledge (cognitive side of the mind), and soft competences circumvent the behavioral aspect (affective side of the mind). We argue that conative competences help to explain better learning process in organization. Extracting conative competences from cognitive and behavioral ones explain not only “...source of actions in your deep inner nature, but also shows you how to build on those strengths” (Kolbe, 1997: 4). Kolbe (1997) claims that human beings have a conative style, or a preferred method of putting thought into action or interacting with the environment. It is separated from a person’s intelligence or personality type. Conation as an emerging concept can help to clarify the competence model. Conation is close to the concept of volition, defined as the use of will, or the freedom to make choices about what to do (Kane, 1985). Some authors perceive conation as a proactive aspect of behavior (as opposed to reactive or habitual) which is the personal, intentional, deliberate, goal-oriented or striving component of motivation (Baumeister et al., 1998; Emmons, 1986) or as the tendency to take purposive action toward goals (Snow, Corno and Jackson, 1996). To summarize several definitions, conation could be defined as the volitional steering of action toward some goal.

However, when explaining conation, the problem we face is that conation is difficult to separate from cognition, emotion and behaviour (Snow, 1989). Moreover when measuring cognition or emotion, conative components are often interweaved. For example, the Wechsler scales of intelligence include a conative component (Cooper, 1997; Gregory, 1998). The Goleman’s construct of emotional intelligence includes both affective (e.g. empathy, optimism, managing emotions) and conative (e.g. setting goals, self-regulation) components (Goleman, 1995). On the other hand, some authors claim that conation has cognitive and affective, as well as volitional, components (Gollwitzer, 1990; Snow & Swanson, 1992).

We claim that conative competences represent inborn, almost instinctive part and are as such most stable ones. On the other hand they can not be learned unlike cognitive and behavioral competences. Conative competences can only be fostered.

Conative competences compose together with cognitive and behavioral competences the organizational mental map. Organizational mental map is a dynamic concept which represents all employees who are involved in the process of achieving corporate goals. It can change through time in accordance with employees’ dismissals or by adding new employees. On the other hand, it depends on organizational learning process, codified knowledge (as explicit one) and tacit knowledge, intellectual property (patents, trade marks) and relational capital in the form of formal know-how and know-what (see Figure 1).

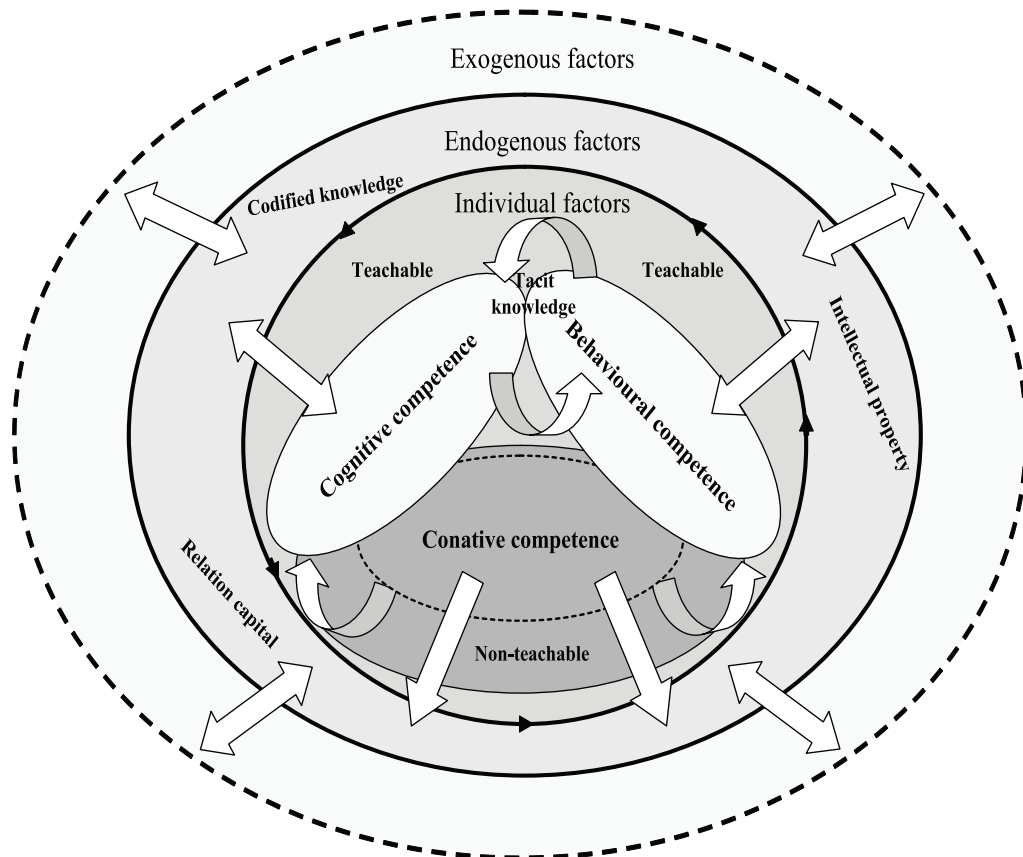


Figure 1: Impact of exogenous, endogenous and individual factors on organizational mental map

It depends on individual factors whether organizational learning process will be static or dynamic. Lam (2001) claims that there is sufficient empirical evidence supporting the assertion that retaining status quo is far more normal phenomenon for an organization than its engagement in change, given that there are sufficient historical, institutional and performance factors that encourage individual and organizational inertia. Propensity of organization to changes and prompt adaptation to speeding up changes in environment (exogenous factors) depends on mentioned individual factors, clustered in organization mental map. Individual factors influence endogenous factors as well. It is employees who will inspire systems and processes within organization. According to Kavčič and Tavčar (2008) long-term orientation of the organisation depends on the organisation culture, management philosophy, and long-term and enduring choice of resources (capital, work, knowledge).

Exogenous factors disrupt such state of equilibrium. They cause organizational stress (Dill, 1958; Hall and Mansfield, 1971) which influences individuals and they res-

pond with adaptation to such organizational strain. External threats (Amburgey et al., 1990) are "logic of action" at the institutional, managerial, and technical levels (Baccharach et al., 1996) or basis for intensive negotiation for a new order.

3 Research

In this section, research methodology, data of analyses and discussion are presented.

3.1 Research methodology

For the purpose of this study, a sample of three randomly selected Slovene SME companies is used. Our sample consisted of 43 top and middle managers, out of that 20,9 % were female and 79,1 % male respondents. At the time of our study, 69,8% were over 30 years old, 44,2% had more than 10 years of work experience and 30,2%

Table 1: Sample characteristics

	Company 1		Company 2		Company 3		Total	
	No.		No.		No.		No.	
<i>Sample size</i>	28	100%	8	100%	7	100%	43	100%
<i>Prior education level</i>								
Secondary/high school	22	78,6%	8	100%	0	0,0%	30	69,8%
College/university	6	21,4%	0	0,0%	7	100,0%	13	30,2%
<i>Work experience</i>								
10 years or less	13	46,4%	5	62,5%	6	85,7%	24	55,8%
Over 10 years	15	53,6%	3	37,5%	1	14,3%	19	44,2%
<i>Age</i>								
30 years or less	8	28,6%	4	50,0%	1	14,3%	13	30,2%
Over 30 years	20	71,4%	4	50,0%	6	85,7%	30	69,8%
<i>Gender</i>								
Female	4	14,3%	2	25,0%	3	42,9%	9	20,9%
Male	24	85,7%	6	75,0%	4	57,1%	34	79,1%

of them had college education. Sample is presented in Table 1.

The companies in the sample were chosen in a random manner in different sectors of industry:

- Company 1: Engineering and related technical consultancy.
- Company 2: Cutting, shaping and finishing of ornamental and building stone.
- Company 3: Legal, accounting and market research.

Four of respondents were excluded from further analyses because their natural instinctive abilities could not be recognized.

Implemented assessment tools were the Kolbe A™ Index as a measure of inborn personal traits clustered in conative competences and the Kolbe B™ Index as a measure for an individual's job-related self-expectations. Kolbe A™ Index is according to Kolbe (2003) reliable and valid tool in terms of test-retest. According to the Kolbe Corporation, there is no bias in gender, age, race, or national origin in Kolbe instrument results (for more details see Kolbe Corporation Statistical Handbook, 2003 and 2004).

Kolbe suggests that human beings have a conative style or a preferred method of putting thought into action or interacting with the environment. It is our knack of get-

ting things done, achievement aspect of ability, the process through which we fulfill our goals (Kolbe, 1997).

Kolbe identifies four Action modes™ or conative modes through which we act with different intensities and can be determined with the Kolbe A™ Index (conative reality):

- FF - Fact Finder - instincts to probe, refine, and simplify, which is based on instinctive need to probe and relates to the way we gather information.
- FT - Follow Thru - instincts to organize, reform, and adapt, which is based on instinctive need to pattern and deals with the way we organize information.
- QS - Quick Star - instincts to improvise, revise, and stabilize, which is based on instinctive need to innovate and how we deal with unknowns.
- IM - Implementer - instincts to construct, renovate, and envision, which is based on instinctive need to demonstrate and relates the way we seek tangible solutions.

The degree of intensity each individual has in an action mode is defined on a scale from 1 to 10, with 10 being the most intense (Kolbe, 1997). Each mode has three zones of operation on a scale of 1 to 10 (Kolbe, 2004). In Preventive zone (1 to 3) one prevents problems, in Responsive zone (4 to 6) one acts in an accommodating way and in Initiative zone (7 to 10) one initiates solutions. The Kolbe A™ Index has become popular for different business applications, such as career development, interpersonal relationship management, personnel selection, team management, consulting, and training (Wongchai, 2003).

Possible conflict can be studied by comparing Kolbe A™ Index results of different individuals with those

individuals with different instincts that cross each other's progress by insisting on their own paths to problem solving. Kolbe claims that there would be stress between individuals working directly with one another if they have a difference of 4 or more in any mode (Kolbe, 1997). Strain on the job can be spotted if Kolbe A™ Index results are compared to Kolbe B™ Index results, which measures individuals job's self expectations. Strain occurs when an individual tries to live up to false self-expectations (Kolbe, 1997).

Some authors claim that more research is needed to explore how Kolbe A Action Modes™ can be used to predict learners' attitudes and achievements. Wongchai (2003) based on limitations of her studies concluded that Kolbe A Action Modes™ did not predict how well did learners liked content formatted to match learning styles of mentioned four modes, nor how well learners remembered the content regardless of the format. Harper (1997) researched learning strategies of high school students with Kolbe™A Index. Her findings show correlation with learning strategies and Fact Finder and Follow Thru action mode. No findings were related to Quick Start and Implementor.

3.2 Data analyses

Due to small sample we calculated median values for conative competences for Kolbe A™ Index results and Kolbe B™ Index results (Table 2).

Median value of Kolbe A™ Index results and Kolbe B™ Index results differs in particular companies.

Table 2: Median values for conative competences for Kolbe A™ Index results and Kolbe B™ Index results

			FFa	FTa	QSa	IMa	FFb	FTb	Qsb	IMb
Company 1	N	Valid	28	28	28	28	28	28	28	28
	Median		5	5	4,5	4	5	6,5	4,5	4,5
Company 2	N	Valid	7	7	7	7	7	7	7	7
	Median		7	5	6	4	5	6	6	3
Company 3	N	Valid	7	7	7	7	7	7	7	7
	Median		6	4	4	6	4	6	4	8

Because we wanted to calculate standard deviation mean values were calculated. Thus mean values for conative competences, and standard deviation for all four action modes, measured by the Kolbe A™ Index are presented in Table 3, and Table 4.

In FF action mode, the employees in Company 3 exhibit the highest mean value (FF = 6,1). The highest mean value in FT mode have employees in Company 2 (FT = 5,2). Employees in Company 3 have the highest mean value in QS action mode (QS = 5,6) and the highest mean value in Company 2 in IM action mode (IM = 5,3).

Standard deviation is the highest in Company 1 in all four Action modes™, except in IMa Action mode™ in Company 2, which could be attributed to industry, company is in. In other Action modes™ standard deviation is lowest in Company 2.

In Table 5, the mean values for an individual's job-related self-expectations measured by Kolbe B™ Index are presented.

Employees in Company 3 exhibit the highest mean value for an individual's job-related self-expectations in three action modes (FF = 5,0; FT = 6,6; QS = 5,7). In IM

Table 3: Mean values for conative competences

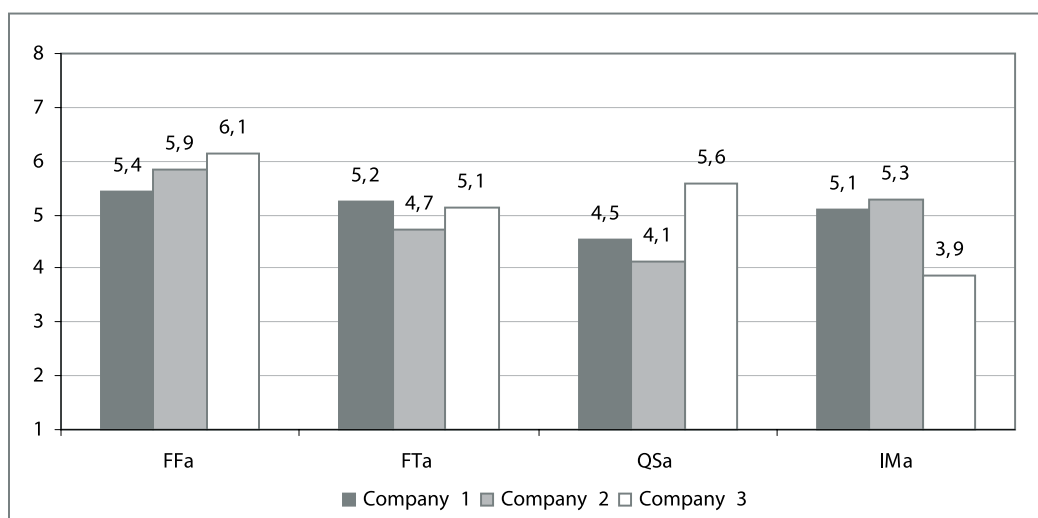
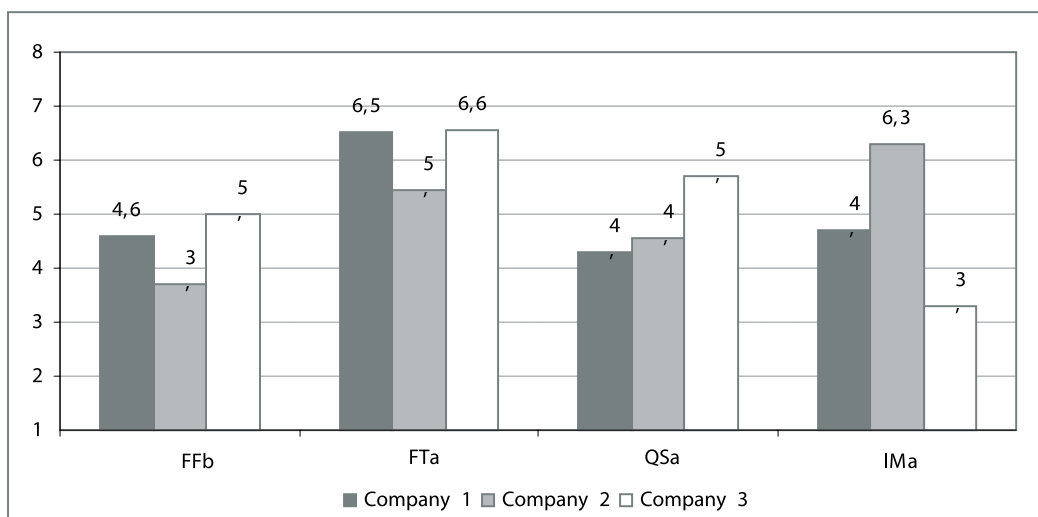


Table 4: Mean values and standard deviation for conative competences

Company		FFa	FTa	QSa	IMa
Company 1	Mean	5,44	5,24	4,52	5,08
	Std. Deviation	1,60935	1,3626	1,68622	1,73013
Company 2	Mean	5,8571	4,7143	4,1429	5,2857
	Std. Deviation	1,06904	0,95119	0,89974	1,88982
Company 3	Mean	6,1429	5,1429	5,5714	3,8571
	Std. Deviation	1,06904	1,57359	1,71825	0,89974
Total	Mean	5,641	5,1282	4,641	4,8974
	Std. Deviation	1,44162	1,32147	1,61387	1,68265

Table 5: Mean values for an individual's job-related self-expectations



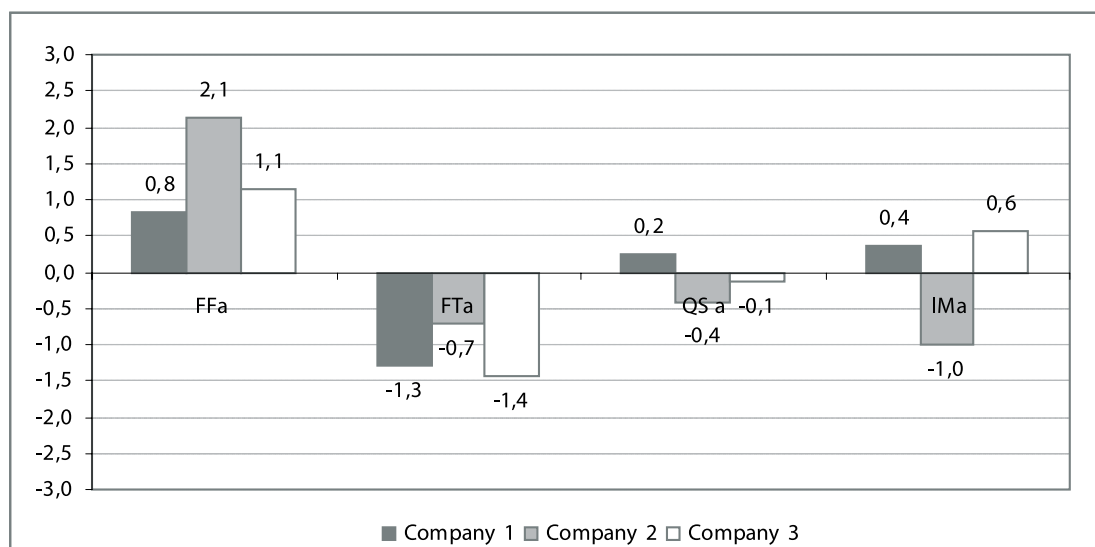
action mode, the mean value for an individual's job-related self-expectations is the highest in Company 2 (IM = 6,3)

Mean values for conative competences measured by Kolbe A™ Index and mean values for an individual's job-

related self-expectations measured by Kolbe B™ Index are compared and the result shown in Table 3.

For FF conative action mode are differences in mean value for conative competences and mean value for an in-

Table 6: Comparison of mean values between Kolbe A™ Index results, and Kolbe B™ Index results



dividual's job-related self-expectations the highest in Company 2 (FF = 2,1). In FT conative action mode, the difference is the highest for employees in Company 3 (FT = -1,4). By comparing all four action modes it is observed that the difference is the lowest in all three companies in QS action mode. This action mode is most leveled, however employees in Company 2 exhibit highest difference (QS = -0,4). And in IM conative action mode, the difference is the highest in Company 2 at (IM= -1,0).

3.3 Findings and discussion

Beside cognitive (hard) and behavioral (soft) competences, conative competences have influence on learning organizations as well. However focus of this article were conative competences. With conative competences we touch innate, inborn part of competences.

The hypothesis was confirmed. According to median and mean values of conative competences, measured by Kolbe A™ Index, conative competences as a part of organizational mental map vary in different organizations. Mean value for conative competences measured by Kolbe A™ Index reveals that employees in Company 3 have the highest inclination to gather, analyze, research and probe information (conative FFa action mode). We attribute this to the industry characteristics (consultancy firm). Most leveled in all three companies is conative competence to plan and organize (conative FTa action mode). Instincts to improvise, revise, and stabilize, which is based on instinctive need to innovate (most commonly cited personal traits of entrepreneurs) is the highest in Company 3. Employees in Company 3 easily deal with unknowns (conative QSa action mode). Employees in Companies 1 and 2 have high mean result in their instincts to construct, renovate and envision (conative IMa action mode).

Differences in mean values for conative competences measured by Kolbe A™ Index and mean values for an individual's job-related self-expectations measured by Kolbe B™ Index reveal possible source of organizational strain in the process of organizational learning. Moreover, it reveals origin of inferior performance. Mean value for an individual's job-related self-expectations is lower than expected in all three companies; this difference is the highest in Company 2. It means that employees, before making any decisions, need more time to analyze, research and justify than according to their job requirements one would expect. This is very important for organizational learning process and it reveals impediment in learning process. All three companies have lower mean value for individual's job-related self-expectations than for inborn conative competences. It means that employees feel that they must stick to procedures and plan more than according to their natural, inborn inclination. Bottom line results reveal that employees in all three companies would like to take more time and analyze and research before they reach decisions. They would not stick to procedures as much as it is expected from them. In dealing with unknown, they suffer the least strain.

The results of the study suggest that personal traits influence learning organizations regardless the model, i.e. double loop learning, adaptive learning or Kolb's model of experimental learning in the way that employees try to adapt to job's expectations. They can adapt cognitive and behavioral competences but conative competences can only be fostered. They can not be changed but would influence not only organizational learning process but also corporate performance in the end.

However, the results of the study suggest that combination of conative competences can have different impact on individual companies. What matters in contemporary management practice is how hidden potentials are set free and how they intrinsically motivate employees according

to their personal differences in capabilities. Hence, in day to day operations individual personal traits should be carefully considered.

4 Conclusions and future research

Sample is too small to extract general conclusions and the results of the study should be interpreted with caution. It is still work in progress, and further longitudinal researches are needed. Omnipresent question of causality of variables of organizational learning influences results as well, thought in conative competences only with level of adoption, considering they are inborn part of personality. Interpretation of our analyses should take into account that only representatives of some sectors were analyzed and thus should be interpreted with care. Despite these limitations, the authors believe that the study helps to understand better organizational learning in general and provide insightful directions for advanced studies in this area. Moreover, it shows how conative side of mind and thus conative competences can actually influence the organizational learning. Individual responses to changes differ on the account of competences, especially conative ones. We argue that acquiring these competences is an on-going, lifelong learning process.

Individual factors as component of organizational mental map are dynamic and are changing according to people being involved, as well as endogenous and exogenous factors. Cognitive competences can be learned, and behavioral competences can be acquired through process of professional socialization. Contrary to that, conative competences are inborn and can be only fostered.

Further longitudinal research to measure the level of adapting on national level and address the issue of causality, especially in transition economies, is needed. Proposed model of organizational mental map and conative competences should be perceived as a continuation of interesting journey into organizational learning. Discussed issue should be studied with elevated care in Slovenia and in other transition economies due to its potential and as a possible way to catch up with more developed economies.

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Darko Kovač, is Lecturer at Vocational College for Catering and Tourism Bled and founder of CO&DA, d.o.o. Consultancy Company in Slovenia. He has published papers on strategic management and human capital. His current interest is focused on human capital measurement and international competition.

Andrej Bertoneclj, is Assistant Professor at the University of Primorska, Faculty of Management Koper and Senior Research Associate at the University of Cambridge. He has published books and papers concerning strategic management, mergers and acquisitions, and human capital assessment. His current research interests include growth strategy, corporate development, mergers and acquisitions, and industrial economics.

Organizacijski miselni vzorec in konativne kompetence

Posamezniki, njihova znanja, veščine, obnašanja in naravne danosti vplivajo na organizacijsko učenje. Za umestitev individualnega nivoja v organizacijsko učenje predstavljamo koncept organizacijskega miselnega vzorca, ki ga razumemo kot dinamičen koncept, ki se spreminja glede na vpletene ljudi in glede na endogene in eksogene faktorje. Predstavljamo primer treh slovenskih majhnih podjetij s poudarkom na individualnih faktorjih, posebno pa konativnih kompetencah. Konativne kompetence predstavljajo tisti del organizacijskega miselnega vzorca, ki se kot prirojen del človekove osebnosti ne spreminja. Konativne kompetence samo vzpodbujamo, ne moremo pa se jih priučiti, zato bi jih kot take morali tudi upoštevati v organizacijskem učenju. Rezultati raziskave vodijo k zaključku, da bodo osebne lastnosti zaposlenih vplivale na organizacijsko učenje, je pa odprto vprašanje vzročnosti.

Ključne besede: organizacijsko učenje, majhna in srednje velika podjetja, konacija, konativne kompetence, organizacijski miselni vzorec

Internet Marketing Communication and Schools: The Slovenian Case Study

Aleš Tankosič¹, Anita Trnavčević²

¹Technical School Centre Nova Gorica, Cankarjeva 10, 5000 Nova Gorica, Slovenia, ales.tankosic@tsc.si

²University of Primorska, Faculty of Management Koper, Cankarjeva 5, 6000 Koper, Slovenia, anita.trnavcevic@fm-kp.si

Worldwide, some 1.32 billion people now use the Internet (Internet World Stats 2007). In the developed countries the Internet is also present in educational institutions; schools use the Internet as a means of communication with their customers. In Slovenia, however, research focusing on Internet marketing communication are rare in the field of education. This paper provides the theoretical framework and the results of the qualitative case study conducted at a school centre in Slovenia in 2005. Data were collected through group interviews and document analysis. The findings support the School Centre teachers' claim that the Internet does not enable personal contacts and the sensory collection of physical evidence, which are considered to be major disadvantages of Internet marketing communication. The teachers who consider Internet marketing communication to be an advantage stress the importance of virtuality which can function as a simulation of communication in the real world. Their adversaries, on the other hand, stress the importance of the physical world and warn us of the negative sides of virtuality.

Key words: education, marketing, internet marketing, internet marketing communication

1 Introduction

Globalisation and the intensification of competition, changes in demographics regarding birth rate, the comparisons of quality of educational systems and the 'adaptation' to the EU standards, the impact of information (communication) technology (ICT), and focus on customer satisfaction are some of the factors influencing the marketing strategies of schools in Slovenia and worldwide (Snoj 2007). A number of changes have occurred in Slovenian schools, such as a decrease in the birth rate and a related decrease in the number of students enrolled in kindergartens, primary and secondary schools; changes in school management and governance (i.e. changes in the structure of the school board), a greater autonomy that was devolved to schools and a 'call from the government' to make networking between schools more effective than they were in the past (Trnavčević 2007). Moreover, the importance of information technology is being given even greater attention in our nation's schools.

The Internet is a constituent part of information technology. It has changed the view of organisation management greatly and brought fundamental changes in this field (Zinkhan 2005; Weber 2007; Crovella and Krishnamurthy 2006). Internet World Stats (2007) claims

the number of Internet users in Slovenia has increased by 296% between the years 2000 and 2007. The latest data concerning Slovenia show that 64% of its inhabitants are currently using the Internet (Internet World Stats 2007)¹. A growing trend towards the Internet use can be seen in schools as well; for example in the school year 2007/08 The National Education Institute of the Republic of Slovenia (2007) is offering twenty seminars on the Internet. The seminars offer not only a basic knowledge of the Internet as a source of information, but also present it as a tool of marketing communication.

Internet marketing communication is a constituent part of internet marketing, having a considerable number of advantages in comparison with other communication tools: cost efficacy, time and geographic dimensions, massiveness, interaction with users, speed, a high level of segmentation and personalization, and data measurement (Weber 2007; Hanson 2007; Kalyanam and McIntyre 2002). Due to these advantages Internet marketing communication has been introduced into schools. However, no research on its efficacy and attitudes of its users, employees in schools or other school 'customers', has not been conducted in the field of education in Slovenia as of this date.

The purpose of our study was to explore the views, attitudes and perceptions that participants, teachers emplo-

¹ In North America 71% of the population use the Internet, in Europe 43,4%, in Africa only 4.7% of the population use the Internet (Internet World Stats 2007).

yed in the selected School Centre, have regarding Internet marketing communication. The School Centre was chosen because it was the first among all other secondary schools to introduce a free system of e-management (e-markbook etc.) which is available for users on the Internet. The School Centre programmes focus on technical education, e. g. electronics, mechanical engineering, computer science, etc. The average age group of the students is between 15 and 18 years of age.

The development and implementation of the website is entirely the product of the School Centre teachers. The population consisted of 112 school teachers, grouped into three schools. One might argue that multiple views should be included in the study in order to 'avoid' bias and 'singular perspective'. However, teachers who, according to Barnes (1993: 6) and Evans (1995: 16), represent internal providers who are an important group in the process of marketing communication between schools and customers. We argue that if teachers do not accept Internet marketing communication, there are few, if any possibilities that such communication will be successful in its initial stage. Teachers' commitment and understanding of the role of Internet marketing communication and their positive attitude towards this 'kind' of communication form the foundation for the development initiative from the school side.

The presented research is a qualitative case study. Data was gathered by group semi-structured interviews and documentary analysis. For each school of the School Centre we conducted separate group interviews with six teachers. The research questions were derived from theoretical discussions and published research. The analysis was done by a content analysis method (Angrosino 2005; Esterby-Smith, Thorpe and Lowe 2005). Interviews were recorded and transcribed which enabled detailed text analysis. Data, in the form of the transcribed text, was then categorised.

2 Internet marketing communication – theoretical background

Chaffey et. al. (2006: 6) define Internet marketing as »the application of the Internet and related digital technologies to achieve marketing objectives and support the modern marketing concept«. Strehovec (2003: 28) argues that the World Wide Web is a sociable, rather than technical creation intended for people to interact. Chaffey et. al. (2006: 34) state that the Internet enables interactive communication between marketers and customers, customers themselves and the competition. Users can learn more about products, or services by allowing them to interact with the Web site. It also provides for a greater accumulation of customer knowledge as it is customer-oriented concerning his or her needs and wants. Weber (2007: 120) argues that each phase of developing and positioning a product or service on the Internet can provide feedback information to the business from its best experts, that is its customers. Weber (2007: 122) also discusses the essence of this interaction; by offering feedback information, custo-

mers can influence the company's decisions about certain products or services. A customer becomes a team worker, an external expert whose opinion is of crucial importance to the marketer. By promoting interaction through the use of chat, virtual communities, Web conferencing, etc., marketers can have direct access to customer feedback (Allen, Kania and Yaeckel 2001). Certainly this type of interaction and customer feedback is relevant for educational institutions as well.

Nowadays, new programmes are being introduced into Slovenian schools; unfortunately, the opinion of their potential customers is not being considered adequately. The enrolment of students in new programmes is often disappointing. Up-to-date feedback information from customers is recommended, which could increase the efficiency and efficacy in planning and introducing innovative programmes.

The Internet has been proven to be a most useful and effective tool in the field of service marketing (e. g. e-consulting, e-finance, e-education, etc.) and products which can be digitalized (e. g. books, specialized literature, software, music, games, photographs, etc.) and easily transferred, with lowest risk and without any additional costs, to the customers (Hansen 2007; Hart, Greenfield and Johnston 2005; Weber 2007).

On the basis of data concerning Internet user's behaviour, the Internet allows for greater segmentation and personalization (Kalyanam and McIntyre 2002; Hanson 2006). Weber (2007: 79) and Hanson (2006: 297) claim segmentation enables the creation of virtual communities that result from shared interests, relations and transactions. A virtual community is a collection of people whose online interactions are based upon shared enthusiasm for knowledge of a specific activity (Bakardjieva 2003; Solomon 2002). Such sites allow members to congregate online and exchange views on issues of common interest. From the point of view of marketers, virtual communities represent an exceptional source of information for greater knowledge of customer behaviour (Solomon 2002; Weber 2007; Hofacker 2001).

Dreyfus (2001: 104) criticizes virtual communities by warning against anonymous chatterers from all over the world who do not take any risks at all. According to Strehovec (2003: 321), today's world tends to criticize the Internet; namely, the cyber-space experience is far more impoverished than the physical one since it excludes physical contact; hence cyberspace is a platonic environment of pure and ideal identities and processes where because of the lack of physical contact, passions and interests can be fatal. Dreyfus (2001: 55) criticizes cybernetic Platonism where the role of a body is absent, and accumulated information on the World Wide Web makes us think the world is a senseless collection of billions bits of data and a senseless environment defined by bodies, wishes, interests and intentions. The attraction of the World Wide Web is in its disappearing relevance. Consequently Dreyfus (2001: 79) argues that nothing is so trivial that could not be included, and nothing is of such irrelevance that could not be included. We agree that Dreyfus's reproaches are too 'static'

and impractical since Internet marketing communication does not necessarily imply the separation of body and mind. Dreyfus's opinion is opposed by Kotler and Keller's supposition (2006: 493) that even e-organizations use, besides the Internet, the so-called offline; traditional tools of marketing communication. Internet marketing communication cannot entirely replace other forms of marketing communication. On the contrary, the success and efficacy of Internet marketing communication depend on the appropriate integration and use of traditional marketing communication tools which inform the customers about the existence and location of the website on the Internet.

Virtual space can certainly be understood as a place filled with ideal identities, but it is impossible to exclude the physical factor, that is an individual in the 'real' world from the virtual one. Owing to the advantages (gaining potential users), a specific educational organization can idealize its own identity with the help of the Internet. Irrespective of the level of virtuality, the process of communication between schools and its customers needs a physical point of view which can satisfy the need for physical evidence. Yet, it is questionable whether the idealizing of a proper identity is useful and reasonable. It is in the interest of schools to obtain new students who are able to fulfil the demands of a programme and finish their studies.

However, financial and intellectual theft, as well as virtual violence, are some of the disadvantages of the Internet (Weber 2007). Although there is much hype and media attention to the privacy on the Internet, online users are skittish. Customers are concerned about the security and confidentiality of their personal information in the online environment (Svantesson 2007). The fragility of trust is in fact a characteristic of the virtual environment. Trust, which is hard to build, can be easily betrayed (Balkin and Noveck 2006; Skyrme 1998).

The advantage of Internet marketing communication is its cost efficacy in the sense of gaining customers and observing their behaviour, developing relationships with customers and exhibiting a great deal of flexibility when paying attention to the customers' needs and wants (Weber 2007; Strauss, El-Ansary and Frost 2005).

The characteristics mentioned above are a challenge for all schools in general and for the school that is the subject of this study. From 2005 on, the School Centre has been working on the project entitled MoFAS. The new system should enable schools to have greater autonomy and responsibility for the results of the education they offer their customers. It should stimulate greater economy and solutions to identified problems which will improve the quality of its programmes as well as reduce costs, and enable a faster reaction to the needs of the labour market and environment (MoFAS 2004).

2.1 Case study of the School Centre in Slovenia

The School Centre where the study was conducted has its own website which serves as a means of communica-

tion with its customers and the public. The Centre was the first among all other secondary schools to introduce a free system of e-management (e-markbook etc.) which is available for the users on the Internet. The development and implementation of the website is entirely the product of the School Centre teachers. It was developed and implemented in order to increase the 'rational use of resources' and to expand all possible ways of communication. The factors demanding rational communication between the school and its customers are the following: the introduction of new programmes, a cost efficacy demand, greater emphasis on 'satisfied customers', and the size of the Centre itself with 112 teachers. Moreover, there is polarization amongst the staff regarding opinions about the use of the Internet as a means of rational marketing communication.

3 Methodology

The present research is a qualitative case study. Case studies strive to portray 'what it is like' to be in a particular situation, to portray the close-up reality and 'thick description of participants' lived experience of, thoughts about and feelings for, a situation (Stake 2005; Yin 2005; Merriam 2002). The purpose of the case study was to gain an insight into the teachers' perception about Internet marketing communication. For a research community, a case study optimizes understanding by pursuing scholarly research questions (Stake 2005). The research questions are derived from theoretical discussions and published research. The study was guided by the following research questions:

- How do teachers perceive the Internet in comparison with other tools of marketing communication?
- What do the teachers from the School Centre perceive as advantages and disadvantages of Internet marketing communication? A previous survey shows that 71% of the School Centre teachers consider impersonality to be the basic disadvantage of Internet marketing communication. Hence, we were particularly interested in the advantages or disadvantages the participants perceive in Internet marketing communication.
- How do teachers make sense of their own activity, and efficacy within the process of Internet marketing communication in comparison with other tools of marketing communication? We were particularly interested in this question because of the results of a survey conducted in this school in 2005.
- How would teachers/participants in the study improve the role of the Internet as a means of communication between the school and parents? Having analyzed the documents on the use of the forum as a communication tool, we found out that the forum was considered to be too simple of a means of communication as has been identified in some research (Allen, Kania and Yaeckel 2001). How, therefore, can then be intensified the use and role of the Internet be improved in schools?

Data were obtained by a group interview process. The results of a previous survey served as a basis for questions used in the group interviews (Tankosić 2005).

The School Centre consists of three schools identified for the study as A, B and C. School A employs 41 teachers, school B 40, and school C 31 teachers. The School Centre website is the same for all three schools, thus all the schools are presently using the same technology for Internet marketing communication. For each school we conducted a separate group interview with six teachers. The participants were selected according to working groups that are the largest in number within the particular school. Another criterion was the diversity of fields of professions among employees in order to obtain as many different opinions as possible. Each school was represented by three teachers/participants with a technical science background and three teachers/participants with a social science background. All the participants were assigned false names in order to ensure an ethical standard – the anonymity required in qualitative studies (Christians 2005).

To reduce the likelihood of misinterpretation various procedures were employed, two of the most common being redundancy of the data gathering and procedural challenges to explanations. For qualitative casework, these procedures generally are called triangulation (Stake 2005; Yin 2005). Triangulation has been generally considered a process of using multiple perceptions to clarify meaning, and verifying the repeatability of an observation or interpretation (Stake 2005). The case study was carried out using triangulation of data sources (data triangulation) (Yin 2005).

The present case study has methodological, as well as content limitations. The former is represented by the generalization of the findings. Easterby-Smith, Thorpe and Lowe (2005: 64) and Trnavčević (2003: 8) discuss generalization through statistical probability and theoretical abstraction. They stress the importance and the size of the sample structure. The following study does not fulfil criteria for generalization through statistical probability beyond the case, which also is not the purpose of the paper.

One of the authors formed his own general opinion about Internet marketing communication due to his participation in Internet marketing communication at the School Centre, which one could claim to be a biased position.

As for contextual limitation, there are only a few references in Slovenian on Internet marketing communication and Internet marketing in general. Also, the amount of literature from other countries is insufficient in the field of Internet marketing communication in education. The authors (Chaffey et. al. 2006; Strauss, El-Ansary and Frost 2005) claim that the doctrine of Internet marketing communication is changing rapidly, which can be considered an obstacle from the point of view of analyzing the theoretical framework.

4 Findings

Data was analyzed by employing a content analysis method (Easterby-Smith, Thorpe and Lowe 2005). In the process of analysis, data were categorized on the basis of the research questions asked of the participants. Findings are presented in the following sections.

4.1 The importance of the Internet in comparison with other tools of marketing communication

The teachers perceive the Internet as a tool of marketing communication which does not enable personal contact and provide physical evidence². According to Weber (2007: 32), Jarvenpaa and Leidner (1999: 3), these deficiencies have a great influence on the interactions, feelings, emotions and relationships among participants in the process of communication. Furthermore, the lack of physical evidence negatively influences the building of trust gained within relationships (Balkin and Noveck 2006). Trust is particularly important for services, which by their nature are highly intangible (e.g. educational institutions) because there is a need for a minimum level of customer trust before service delivery is initiated (Evans, Jamal & Foxall 2006).

The School Centre teachers consider personal contacts and physical evidence extremely important. They even claim that the 'open-door day', compared to Internet marketing communication, is the most effective tool of marketing communication for the school. In our research the teachers had to rank twelve tools of marketing communication; the Internet is found in third place right after the 'open-door day'.

As for the impersonality of the Internet, opinions differed significantly. Some teachers said it is an advantage in the sense of a relaxed interaction with other participants as well as allowing for a freedom of expression. This is certainly a good point, for Chaffey et. al (2006: 374) argue: »The customers' feedback information is of vital importance in analyzing efficacy and planning improvements.«

At the same time the advantages function as the counterweight to Dreyfus's (2001: 55) criticism, through which the author reproaches the users of the virtual world with the lack of risk. In this case, it is exactly the characteristic of 'no risk' which enables the user of the Internet to gain authentic feedback information.

The teachers argue there is a kind of a generation gap among Internet users. They believe the Internet will have a greater significance in the future. The main reason for that can be seen in the progress of technology development which will enable a higher level of interaction. Weber (2007: 208-214) as well as Haeckel (2001: 16) discuss the impact of technology development on the future

² To reduce uncertainty, customers will look for evidence of quality. They will draw inferences about quality from the place, people, equipment, communication material, symbols, etc. (Kotler and Keller 2006).

and claim that the level of interaction is getting higher and higher due to technology, which involves a wider spectrum of senses. This is why in the future we can expect an increase in the interaction level.

The teachers also mention the importance of the influence of other e-business (e-banking, e-shopping, e-administration) on Internet marketing communication in schools. Chaffey et. al. (2006: 35–43) as well as Strauss, El-Ansary and Frost (2005: 142) argue that the stress on Internet marketing communication is becoming greater and greater due to public relations within different forms of e-services (education, finance, administration, regions etc.) and its links enabling the formation of different communities of interests with global dimensions.

Despite the facts, the teachers still stress the importance of personal contacts and physical evidence for building trust in the future.

4.2 Advantages and disadvantages of Internet marketing communication

Personal contacts and physical evidence enable people to see with their own eyes and thus build trust. Internet marketing communication is a virtual tool, hence it provokes doubt. This is why people need confirmation in the real world. As Skyrme (1998: 32) argues: »In the virtual world, trust is fragile.«

There are big differences among teachers concerning what is needed to build trust in the virtual world. An example of a high level of trust is given by a teacher claiming that he would not buy a car on the Internet without having tested it before. An example of a low level of trust is a teacher who does not trust letters of apology sent via e-mail; in fact, she prefers receiving them in a classical form. Despite the big differences concerning the level of trust, Sheehan (2001: 158) states both men and women mention doubt as well as trust as being problematic in a virtual environment.

The virtual world is not the only environment which enables idealization of identities and cognitive processes, as states Dreyfus (2001: 55). The teachers see that it is possible to idealize in the physical environment as well. Namely, 'open-door days' make the School Centre 'shine' differently than in everyday life. This finding can be reasonably linked to critical remarks given by Kenway and Fitzclarence (1998: 665). The authors argue that when promoting, we expose and stress 'the sunny side of the subject' only. The same holds true for 'open-door days' at the School Centre.

It is evident that technically-oriented³ teachers have a higher level of trust in the virtual world compared to socially-oriented⁴ ones, and a lesser need for physical evidence. Those teachers who have a positive view on Internet marketing communication perceive virtuality as a way of simulating marketing communication in the real world.

Their opponents, on the other hand, stress the importance of the physical world and warn us of the negative sides of virtuality.

4.3 Teachers' activity and efficacy within the process of Internet marketing communication in comparison with other tools of marketing communication

The teachers with a technical science background are more active in Internet marketing communication than they are on 'open-door days' which are considered to be the most effective tool at the School Centre. They take an active part in creating their own websites that contain teaching material as well as information on teachers and subjects. They communicate with the customers via their websites and e-mail. E-mail communications enables a high degree of personalization, and in order to personalize messages it is necessary to understand the attitudinal and behavioral characteristics of each e-mail audience (Cheung 2008; Chaffey et. al. 2006). Personalization has a significant influence on the intensity and duration of the marketer-customer relationship (brand-loyalty) (Weber 2007; Hanson 2006). The fact is important in the field of education as well. In the virtual world the competition is only a 'click' away. The potential customers are becoming present customers who usually develop a long-termed relationship with the school; hence it is of vital importance to maintain the contact between schools and their customers. To be effective, teachers are designing 'enriched', animated, interactive, and personalized messages for their customers. Personalization, however, is a sensitive area and is often intertwined with privacy issues.

Irrespective of the facts regarding the use of e-mail, teachers must be careful that they don't cause resentment among customers who are already overloaded with 'junk e-mail'. Evans, Jamal & Foxall (2006: 303) also reveal a privacy 'paradox' in that some customers are somewhat cynical about 'relational' interaction and concerned about divulging personal information but are participants nevertheless. There might be a desire on the part of schools to develop relationships with customers but customers do not always want to reciprocate. It is likely that the cynicism is predicated upon a lack of trust resulting from business scams, unfulfilled promises and marketing hype.

Teachers and school marketers walk a fine line between adding value for customers and being intrusive. To avoid irritating customers by sending unwanted marketing e-mail, teachers should ask customers for permission to e-mail marketing pitches. This approach, known as permission-based marketing, has become a standard model for e-mail marketing (Kotler and Armstrong 2008). 'Information privacy' refers to the extent to which individuals can control who holds their data, and what is done

³ Computer science engineers, electrical engineers, mechanical engineers, mathematicians, chemists, etc.

⁴ Linguists, psychologists, sociologists, historians, etc.

with those data. Many customers already believe that they have lost all control over how information about them is used (Evans, Jamal & Foxall 2006).

An increase in teacher efficacy is conditioned by the level of trust in privacy or, in other words, identity protection that is expected and needed by the participants in Internet marketing communication before they start to communicate in a virtual way. Trust is relevant for all virtual communities as well since they hold great promise. Virtual communities rely on a 'Web of trust' in which viewers and advisers tend to be matched up over time with people whose opinions they have come to trust: »It mimics the way word-of-mouth works in the real world.« (Slomon 2002: 325). However, there is also great potential for abuse if members can't trust that other visitors are behaving ethically. Many community members are sensitive to interference from companies and react negatively when they suspect that another member may in fact be a shill of a marketer who only wants to influence evaluations of products/services on the site (Solomon 2002).

Internet fraud, including identity theft and financial scams, has become a serious problem. The question of privacy is certainly of great importance since the results of several investigations (Balkin and Noveck 2006; Weber 2007; Bush et. al. 2000) place privacy in third place within categories regarding ethical issues in Internet marketing.

The teachers with a social science background are more active managing marketing communication tools that require personal contact. This group consists of teachers who speak in favour of personal contacts and physical evidence.

These same teachers do not show any interest in future collaboration with Internet marketing communication. Other teachers with a social science background, on the other hand, are interested in Internet marketing communication, but they lack knowledge about using technologies and Internet marketing communication itself. This group of teachers could improve their efficacy with education in the field of Internet technology and Internet marketing communication.

Those teachers who are active within Internet marketing communication will increase their efficacy by improving the knowledge of tools that enable feedback information from customers. Crovella and Krishnamurthy (2006: 99-102) argue that the Internet offers feedback information on how much investment is 'waste' and what is 'waste'.

The teachers promise to increase their own efficacy by identifying Internet marketing communication as a goal of the school and all its employees, not only a couple of avid individuals.

4.4 The Internet in the future

Internet marketing communication is not integrated into the School Centre vision, neither is it an activity planned

and managed by its principals. It concerns, in fact, a group of enthusiastic individuals of the School Centre. The teachers think Internet marketing communication should be integrated into the vision of the School Centre and should be managed by principals (head teachers).

Teachers and parents should be familiar with the advantages and benefits of Internet marketing communication compared to other tools of marketing communication. A course on the basics of the Internet and Internet marketing communication should be offered. The website has to be reorganized; segmentation should be increased and its structure should be simplified. It should be easy to use, professional looking, attractive and useful.

The teachers suggest the introduction of virtual consultations⁵ with the use of a web cam. It is evident that virtual consultations represent an important challenge. As for business communication, Eggert (2001: 10) states: »The experimental results suggest that physical presence is not decisive for a successful meeting or collaboration. A video conference is as useful to employ the favourable features of face-to-face communication as a 'real' conference.«

With regard to virtual consultations, the teachers differ in opinion. Technically oriented teachers have a positive view of them. Their standpoint is that every school should direct changes, which has a positive influence on the school image. Drucker (2001: 76) claims that only the initiators of changes will survive in the period of fast structure changes. Let us mention Kotler and Fox (1995: 350) who say that marketing communication in education should support a better school image. Hence the introduction of virtual consultations at the School Centre is an excellent idea. Technically oriented teachers also stress the importance in integrating Internet marketing with other digital marketing technologies such as mobile phone marketing, podcasts and vodcasts.

Of course we should consider the critiques given by the teachers with a social science background also. They argue that technology cannot and must not replace personal contacts. Trunk Širca and Koren (2003: 201) warn us as well of oversimplification in e-managing. The authors provide examples of schools satisfied with e-markbooks, which reduced the number of parents coming to consultations by half. The case shows that teachers are not aware of the importance of communicating with parents in person, which cannot possibly be limited to informing parents on students' results only. A similar situation can happen with the introduction of virtual consultations.

The forum of the School Centre has not been revived. It is clear it is not the goal of the School Centre. The statements collected from the respondents show that some teachers are even ignorant of its existence, which is, from the point of view of communication between the school and parents, a disadvantage. Weber (2007: 100-103) claims that forums and virtual communities are simple and effective tools of interaction and represent an Internet version

⁵ A means of communication between parents and teachers, virtual consultations are based upon ICT, e.g. video chat, net meeting, etc.

(viral marketing) of word-of-mouth marketing. Since customers pass the message along to others, viral marketing can be very inexpensive.

Online marketing continues to offer both great promise and many challenges for the future. However, for the School Centre, Internet marketing will remain just one important approach to the marketplace that works alongside other approaches in a fully integrated marketing mix for building customer relationships, communicating school information, and delivering services more efficiently and effectively.

5 In conclusion

The case study demonstrated the following:

Firstly, the teachers perceive the Internet as a marketing communication tool that prevents customers from viewing physical evidence and having personal contacts; which, according to Weber (2007: 32), Jarvenpaa and Leidner (1999: 3) has an influence on interaction, feelings, emotions and relationships among all participants in the process of communication. Furthermore, the lack of physical evidence influences the amount of trust built within relationships. Personal contacts and physical evidence enable people to see with their own eyes and thus build trust. Internet marketing communication is a virtual tool, hence it provokes doubt. This is why people need confirmation in the real world. A dominant characteristic of the virtual world is the fragility of trust.

Secondly, it is evident that the teachers with a technical science background have a higher level of trust in the virtual world compared to the teachers with a social science background, and therefore, a lesser need for physical evidence. Those teachers who have a positive view on Internet marketing communication perceive virtuality as a way of simulating marketing communication in the real world. Their adversaries, on the other hand, stress the importance of the physical world and warn us of the negative sides of virtuality.

Thirdly, the teachers with a social science background are more active managing marketing communication tools that enable personal contact. This group consists of teachers who speak in favour of personal contacts and physical evidence. They do not show any interest in future collaboration with Internet marketing communication. Other teachers with a social science background, on the other hand, are interested in Internet marketing communication, but they lack knowledge about using appropriate technologies and Internet marketing communication itself.

Fourthly, the increase of teachers' efficacy is conditioned by the level of trust in privacy or, in other words, identity protection that is expected and needed by the participants in Internet marketing communication before they start to communicate in a virtual way. The question on privacy is certainly of great importance since the results of research (Balkin and Noveck 2006; Weber 2007; Bush et. al. 2000) place privacy in third place within categories regarding ethical issues in Internet marketing. In Internet

marketing privacy and customer permission have become the cornerstones of customer trust, and trust has become the cornerstone to a continuing relationship (Kotler and Armstrong 2008). Therefore, schools must become the custodians of customers trust and protect the privacy of their customers.

The findings show that Internet marketing communication has disadvantages as well since it does not enable personal contact and physical evidence, which are needed to build trust. Therefore we suggest further research on the ways of compensation for personal contact and physical evidence with the intention of gaining trust in virtual world. Moreover, we suggest research on the views, attitudes and perceptions of students and their parents regarding Internet marketing communication. The knowledge of customers' behaviour within the process of Internet marketing communication is significant for analysing the efficiency and efficacy of marketing communication in general (Solomon 2002; Zaltman 2003).

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Aleš Tankosić is a Lecturer at the Nova Gorica Technical School Centre and a PhD candidate at the Faculty of Management Koper, University of Primorska, Slovenia. His research work focuses on marketing communication.

Anita Trnavčević is an Associate Professor at the Faculty of Management Koper, University of Primorska, Slovenia. Her research work focuses on policy analyses in education, marketing in education and qualitative methodology.

Marketinško komuniciranje na internetu v šolstvu: študija primera

Internet je prisoten tudi v izobraževalnih organizacijah, saj šole internet uporabljajo med drugim kot komunikacijsko sredstvo med šolo in uporabniki. Ne glede na to, so v slovenskem prostoru raziskave s področja marketinške komunikacije na internetu na področju izobraževanja še zelo redke. Članek podaja teoretična izhodišča in ugotovitve kvalitativne študije primera izvedene na šolskem centru v Sloveniji. Podatki so bili zbrani s skupinskim intervjujem in analizo dokumentov. Ugotovitve kažejo, da učitelji Šolskega centra izpostavljajo slabost marketinške komunikacije na internetu, saj ta ne omogoča osebnih stikov in fizičnih dokazov. Učitelji, ki imajo pozitiven odnos do marketinške komunikacije na internetu, postavljajo v izhodišče virtualnost, znotraj katere iščejo 'rešitve' za čim učinkovitejšo simulacijo marketinške komunikacije v realnem svetu, medtem kot 'nasprotniki' marketinške komunikacije na internetu postavljajo v izhodišče fizični svet in opozarjajo na negativne strani virtualnosti.

Ključne besede: izobraževanje, marketing, internetni marketing, marketinška komunikacija na internetu

The Role of Information for Recognising Business Opportunities

Andreja Lutar Skerbinjek

Univerza v Mariboru, Ekonomsko-poslovna fakulteta Maribor, Razlagova 14, 2000 Maribor, andreja.lutar@uni-mb.si

Managers need a lot of knowledge and information to make decisions and recognize business opportunities. They can acquire this knowledge and information in different ways. Accounting information, particularly information relating to the creditworthiness of business partners and competitors, is important. Such information, which can contain non-accounting information, is often derived from annual reports. The fastest and cheapest way of accessing information is via the Internet. Because searching for information about different businesses on their Web sites can be time consuming, a quicker, more efficient option is to access this information on databases that contain useful information relating to the majority of businesses in the country. In this paper, we discuss the importance of knowledge and information for recognizing business opportunities. We also analyze the appropriateness of accounting information available from five of the most widely used databases concerning Slovene and Croatian businesses, for estimating the creditworthiness of businesses.

Key words: business opportunities, knowledge, accounting information, creditworthiness information, databases, business partners, competitors, annual reports, appropriate information, reporting agencies.

1 Introduction

It is very important for managers to recognize opportunities for managing a successful business. To support that, they need a lot of knowledge and information of any kind. A vital part of information is that relating to business partners and competitors with whom they already do business or intend doing business with. Accounting information contains a lot of information about businesses.

We live in the 21st century, when living and working without computer support is unimaginable in many different fields. Likewise, in accounting, computers make our work easier and enable us to obtain information faster and more reliably. Using the Internet to access information at the office or at home is cost-effective and saves a lot of time (Lutar Skerbinjek, 2005:76).

The annual reports of many businesses can be accessed on the Internet, usually on the company's own Web sites. However, not all businesses have their own Web sites. To obtain information concerning such businesses, and because it is very time-consuming to search the information about many businesses on their Web pages, it is useful to use databases which feature information relating to the majority of businesses that operate in a particular country. They are created and maintained by reporting agencies and credit reporting agencies, which obtain creditworthiness information as well. Usually, they create

creditworthiness information on the basis of information obtained from annual reports for each business. They create it for many businesses, so they can compare them and make credit scores with which they rank businesses.

In this paper we discuss the importance of knowledge and information for recognizing business opportunities, and do a comparable analysis of two databases created by reporting agencies on a national level. These follow the National Reporting Agency of former Yugoslavia, which is called Služba družbenega knjigovodstva. These are the databases of the Agency for Public Evidence and Statistics (Agencija za javnopravne evidence in statistiko (AJPES)) in Slovenia, and the Financial Agency, Fina (Finančna agencija Fina) in Croatia. Furthermore, we perform a comparable analysis of three databases created by other Credit Reporting Agencies. These are the GVIN database in Slovenia, the BonLine database in Croatia, and the database created by the international business company Creditreform, which operates in Slovenia, Croatia, and many other European countries.

On the basis of the results of our comparative analysis, we made a critical evaluation of those databases, which we explained. We believe that such analysis has not been made, so it will be useful for Slovene and Croatian businesses and companies globally that are doing business with them to choose the database which would be most appropriate for obtaining creditworthiness information.

2 Need for knowledge and information

Drucker and others describe advanced economies as »knowledge« economies because they are becoming progressively less dependent on materials and energy. As Business Week put it, »The traditional factors of production – capital and skilled labor – are no longer the main determinants of the power of an economy. Now economic potential is increasingly linked to the ability to control and manipulate information« (Fitzroy and Hulbert, 2005: 23). In order to make decisions (for either decision management or control), managers require information (Zimmerman, 2000: 652). We live in the information age, in which modern business organizations function in a vastly altered environment. To prosper, these organizations must treat information as a valued resource. A steady stream of information is needed to enable firms to make sound planning decisions and to control their operations. Firms that use information effectively can take advantage of their opportunities and thus gain ground on their competitors (Wilkinson et al., 2000:4). Indeed, information may be the most important organizational resource (Bodnar and Hopwood, 2001: 2). Information has economic value in that it enables decision making, so it contributes to the achievement of a business's goals. The information age classifies information as an important, even dominant, business resource. The normal operation of a business is not possible without information. However, in spite of the huge supply of data and information, they are still relatively rare resources, and are not always available to everyone, so we should use them sparingly (Knez Riedl, 2000a: 31).

The information process of an organization is roughly equivalent to the nervous system of a human being. It permeates every part of the organization, as well as sensitive key areas of the environment. The better the information an organization gathers about its performance, its capabilities, and its environment, the better the organization will perform and the more effectively it will be able to change (Lawler et al., 2006: 119). Firms that gather, assimilate, and evaluate external and internal information most effectively gain competitive advantages over other firms. Recognizing the importance of having an effective management information system (MIS) will not be an option in the future; it will be a requirement. Information is the basis for understanding in a firm. In many industries, information is becoming the most important factor in differentiating successful firms from unsuccessful firms (David, 2005: 301). The wider availability of information will also accelerate the learning of competitors, so advantages gained through experience may be shorter-lived than hitherto. This will inevitably mean organizations will need to revisit and redefine the basis on which they are competing more frequently. In turn, this will put yet more information demands on the organization (Johnson et al., 2005: 458). Decision makers need information, and the more important the decision, the greater the need (Harrison and Horngren, 2001:5). Managers often have more complete information about the products or services they

offer, while outsiders rely on information the manager is willing to share (Bergh et al., 2008:134). However, information acquisition is costly (Schnatterly et al., 2008: 219). An organization's capability for creating knowledge depends on the extent to which managers and other knowledge employees can combine and exchange information (Goll et al., 2007).

Information is data with context. Knowledge is information with meaning. Wisdom is knowledge plus insight and sound judgement. When applied to any community, these concepts refer to the sum total experience and learning residing within an individual, group, enterprise, or nation. The new source of wealth is knowledge, not labor, land, or financial capital. It is the intangible, intellectual assets that must be managed (Leibold et al., 2002:14). Knowledge structures order an information environment in a way that enables subsequent interpretation and action; they are built on past experience, and represent organized knowledge about a given concept or type of stimulus (Kabanoff and Brown, 2008: 149).

Meso and Smith (2000) understand knowledge management as the creation of sustainable advantage through continued organizational learning. According to Kerste and Muizer (2002), knowledge management is dealing with the structural supply of, and demand for, knowledge within an enterprise. This knowledge can be developed in an enterprise or obtained from external sources. Knowledge can be defined as the awareness, consciousness, or familiarity gained by experience or learning. However, in the context of organizations, it is not just individual knowledge that matters, but the knowledge of groups of people in the organization, or the organization as a whole. Organizational knowledge is the collective and shared experience accumulated through systems, routines, and activities of sharing across the organization (Johnson et al., 2005: 133). Training and development improve quality and make organizations more efficient; they also develop future talent and reduce staff turnover (Pardey, 2007:16). The evidence is that sharing knowledge and experience is essentially a social process that relies on 'communities of interest' developing and sharing information because they see it as mutually beneficial. This could happen through formal systems such as the Internet (and indeed does), but it is also facilitated by social contact and trust (Johnson et al., 2005: 134). The Internet is an extremely important new technology, and it is no surprise that it has received so much attention from entrepreneurs, executives, investors, and business observers. The Internet is an enabling technology – a powerful set of tools that can be used, wisely or unwisely, in almost any industry and as a part of almost any strategy (Leibold et al., 2002:79). Internet technology provides better opportunities for companies to establish distinctive strategic positionings than previous generations of information technology did (Leibold et al., 2002:80). The Internet is an excellent source of information about industries as well as individual companies (Wheelen and Hunger, 2004: 351). The Internet is supposed to be the great equalizer, allowing small and medium-

sized enterprises to compete on a more equal footing with larger firms (Murphy et al., 2007: 58).

Information about competitors is also very important for assessing business opportunities as described in detail below.

3 Information about competition

Recognizing business opportunities means gaining advantage over competitors. Typically, managers take too parochial a view as to the sources of competition, usually focusing their attention on direct competitive rivals. But

there are many other factors in the environment which influence this competitiveness. A model of forces that drive industry competition, also known as Porter's five forces framework, is presented in Figure 1. Porter's model was originally developed as a way of assessing the attractiveness (profit potential) of different industries. As such it can help identify sources of competition in an industry or sector (Johnson et al., 2005: 78). In the face of increasing globalization, managers are forced to reevaluate their competitive options in a more holistic manner, and to consider expansion abroad as a legitimate strategic alternative (Wiersema and Bowen, 2008: 118).

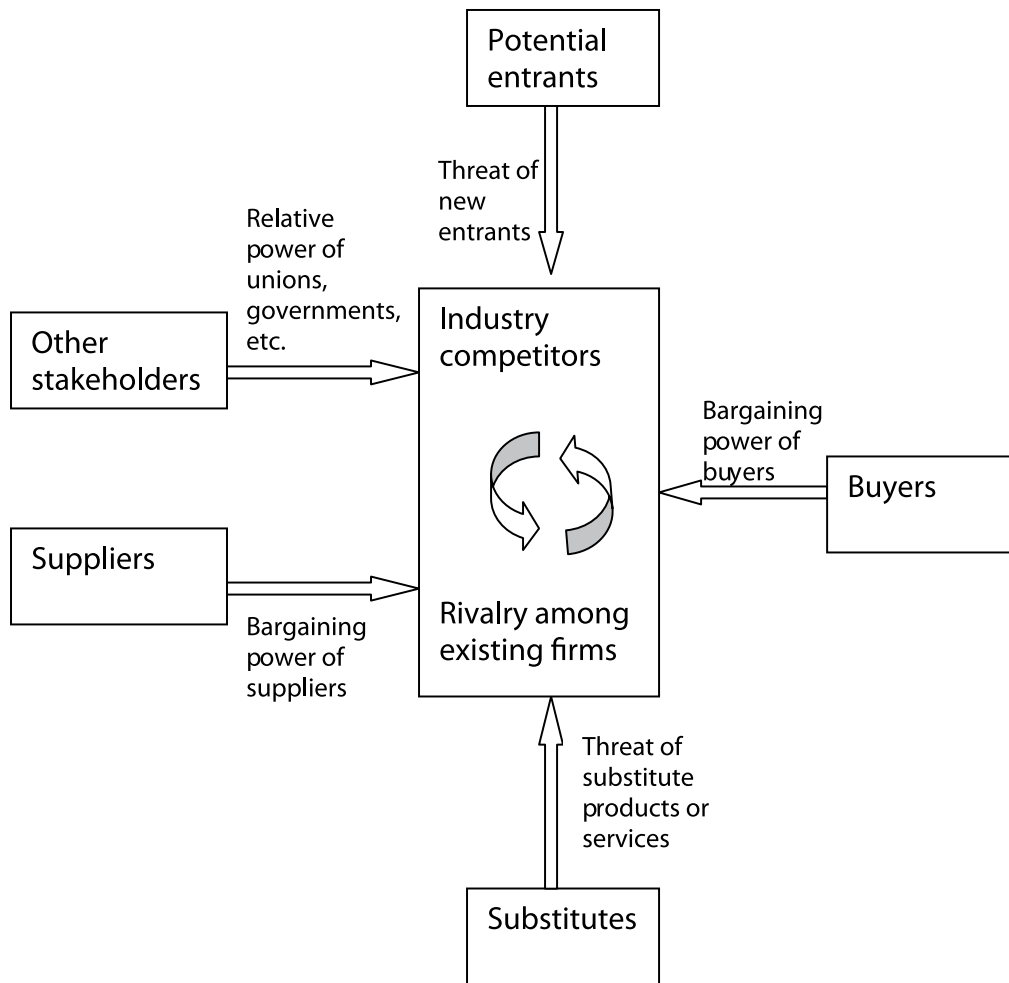


Figure 1: Forces Driving Industry Competition. Source: Wheelen and Hunger, 2002: 61.

As shown in Figure 1, the nature of competitiveness in a given industry can be viewed as a composite of five presented forces (David, 2005: 94). They do not involve only competitors, but all other business partners, as well. Competitive advantage stems from a firm's ability to leverage its internal strengths to respond to external environ-

mental opportunities while avoiding external threats and internal weaknesses. Thus, like a distinctive competence, a competitive advantage must be difficult to imitate to be sustainable. Unlike a distinctive competence, a competitive advantage must also enable a firm to outperform the firms to which it is compared (Mooney, 2007). The way to

beat low-cost competitors that have the potential to become serious competitors is to identify and deal with them early, before they get a foothold in a market (Morehouse et al., 2008).

So, for a business to gain competitive advantage, it must obtain information about all the business partners with which it has or intends to have business relationships. All of them could have a crucial influence on the financial success or failure of the business. So it is important to obtain as much information about competitors as possible.

Common data sources can include (Reuvid, 2000: 9):

- statutory accounts, returns, and filings
- credit agency reports
- trade of corporate directories
- online databases, including the Internet – an increasingly useful source of information on both industries and potential partners
- other publications, eg. trade magazines and newspapers
- prospect lists, contacts, etc. of outside advisers.

A wealth of strategic information is available to organizations from both the published and unpublished sources listed above. The Internet has made it easier for firms to gather, assimilate, and evaluate information. It offers consumers and businesses a broad range of services and information resources from all over the world. Interactive services offer users not only access to information worldwide but also the ability to communicate with the person or company that created the information. Historical barriers to personal and business success – time zones and diverse cultures – are being eliminated. The Internet has become as important to our society as television and newspapers (David, 2005: 96).

A very important part of information for decision making is accounting information. Managers of businesses use accounting information to set goals, evaluate progress toward those goals, and to take corrective action, if necessary (Harrison, Horngren, 2001: 5). Accounting information is crucial in deciding whether to invest money, make a loan, go into business with a potential partner, or analyze the financial statements of potential business partners or their ability to meet scheduled payments or other obligations. So management needs accounting information for all businesses it is involved with (business partners, competitors, businesses to invest in etc.). Developments within the global economic environment require that finance professionals are not only adept at analyzing internal operations but that they are also exposed to, and thus experienced in, generating information relating to operations outside their own organisations (Chivaka, 2007:24).

Basic accounting information about business can be found in financial statements of the business, which are included in the annual report. The objective of financial statements is to provide information about the financial position, performance, and changes in financial position (i.e. cash flow) of an entity that is useful to a wide range of users in making economic decisions. The financial statements show the results of the stewardship or account-

ability of management for the resources shareholders entrust to them (Collier, 2006: 110). Financial statements, footnotes, and supplementary schedules constitute the company's financial report, and all significant information should be included in the financial report. Additionally, other relevant information, which can assist in understanding the financial report, is presented in narrative form. Examples of these types of items are management's discussion and analysis and the letter to stockholders (Schroeder et al., 2005: 550).

According to Company Law (Zakon o gospodarskih družbah ZGD-1, 2006) an annual report in Slovenia must contain a balance sheet, income statement, cash flow statement, capital flow statement, supplements to the financial statements, and a business report. Small businesses that don't sell their shares on the organized capital market are excluded from these requirements. Their annual report must contain a balance sheet and an income statement.

Besides the annual report (balance sheet, income statement, cash flow statement) other data such as data related to a branch, for example, are important for a better understanding of the business partner's other data (Čančer and Knez Riedl, 2005:147). This means that much external and internal data are needed. These data are components of creditworthiness information.

4 Creditworthiness information

Creditworthiness is the ability of a business to exist and sustainably develop its business (Knez Riedl 2000b). Estimating creditworthiness, also known as corporate rating, is designed to give investors a relative indication of the ability of an issuer of a fixed-interest security to repay interest and capital on the security on time and in full. Ratings are intended to be comparable across different industries, groupings, and across issuers from different countries, although the underlying assessments vary from industry sector to sector. The rating process reflects a review of the key underlying strengths and weaknesses of the company being rated and is typically based on five years' past financial data, plus sector information, management forecasts, and discussion of future performance and strategic direction. The rating methodology for industrial companies may be divided into two broad areas: business risk and financial risk. Business risk is a qualitative risk, whereas financial risk is a quantitative risk. Rating on credit quality is looking into future ability to repay debt (Fight, 2001: 137-138).

The most relevant quantitative and qualitative factors of creditworthiness should be taken into account to ensure high-quality decision making. The quantitative factors are presented mainly by financial ratios, based on annual statements. There are many different, and at the same time similar, financial ratio systems, with a limited number of selected ratios, which are fixed in their mutual interdependencies and hierarchy. They are divided into subgroups, depending on the depth of the analysis goals and the expectations and demands of decision makers (Čančer and Knez Riedl 2005).

To estimate quantitative factors of creditworthiness, eleven groups of ratios can be used (Knez Riedl, 2000:56-58):

- capacity ratios (number, structure, and changes of employees; efficiency of working time; technical capacity)
- existing structure and changes of branch ratios (capacity, structure, and changes of production; capacity, structure, and changes of sale; capacity, structure, and changes of export and import)
- ratios of products' and services' quality (rate of products with defects; number of reclamation; quality costs in operating revenue; number of suggestions for improvement of quality)
- financing and investment ratios (value, structure, and changes of assets and liabilities; equity financing rate; debt financing rate; share capital rate; long-term financing rate; short-term financing rate; operating fixed assets rate; operating current assets rate; long-term assets rate; short-term assets rate; equipment to labor ratio; accumulated depreciation rate; equity to fixed assets ratio; equity to long-term assets ratio; long-term financing to long-term assets and normal inventories ratio; acid test ratio; quick ratio; current ratio)
- turnover ratios (current assets turnover ratio; inventory turnover ratio; trade receivables turnover ratio)
- revenue, expenses, and income ratios (value and structure of revenues, expenses, and income; changes on revenues; rate of revenues to employees)
- efficiency ratios (quantitative capacity of production to employee; valued extent of production to employee; revenues to employee)
- profitability ratios (net return on equity ratio; expanded return on assets ratio; net return on share capital ratio)
- liquidity ratios (net cash flow rate; investment to net cash flow ratio; debt to net cash flow ratio; equity to net cash flow ratio; cash flow per share ratio)
- ratios of investing in development and innovation activities (rate of research and development costs in revenues; rate of new products/services in business program; number of innovations to employees; innovations revenue in revenue rate; savings from innovations compared to expenses); and
- environment ratios (containing materials in product; packaging to sales wage rate; rate of defective products to produced quantity; rate of recycled material in defective products; energy consumption; voter consumption; special emissions; environmental investments to all investments rate).

Within quantitative analysis lately there has been more and more important cash flow analysis, assisted by properly designed ratios, as well as analysis of financial flexibility and long-term and short-term efficiency. This means there are more and more important reports for shorter periods than a year, even temporary short-term reports and not only audited annual reports. Besides classical financial ratios, series of ratios, calculated on the basis

of up-to-date accounting standards and data on strategic accounting, can be found (Knez Riedl, 2006:26).

Qualitative factors are descriptive and can be divided into five groups (Knez Riedl, 2000:59-62):

- general characteristics (comprising legal form, ownership, age, size, location, organizational structure, business relationships, information system)
- business activity (standard industrial classification, business program, product and service quality, technology)
- resources/potentials (e.g. employees, management, facilities, innovations and investment activity)
- market orientation (buyers, suppliers, competitors); and
- other qualitative factors (e.g. business morale, organizational culture, reputation, strategies, environmental awareness).

So, qualitative analysis takes into account many qualitative factors relating to the business and its environment (branch and direct business environment), market position, management, and accounting of the business. The risk and perspective of the branch is also taken into account. Also considered are the businesses' market position, competitors' ability, diversification of programs, extent of selling, diversification of buyers and suppliers, cost position, and intangible assets. Management is important, especially in relation to managing a business, strategy, risks, and goals of the business (Knez Riedl, 2006:26).

Furthermore, we have done a comparative analysis of five databases in Slovenia and Croatia which offer creditworthiness information.

5 Assessment of databases with creditworthiness information

For the comparative analysis, we choose the five most widely used databases in Slovenia and Croatia. The first two are databases on a national level: AJPES in Slovenia and Fina in Croatia. Businesses are obliged by law to give these databases annual reports because they are based on official national reporting agencies. Furthermore, we choose two databases that are widely used in those two countries: GVIN in Slovenia and BoneLine in Croatia, as well as Creditreform, an international database that is used in Slovenia and in Croatia.

Information on these databases can be found on the Internet (AJPES, 2008; FINA, 2008; GVIN, 2008; BonLine, 2008; and Creditreform, 2008), and although their information could be considered comparable or equal, detailed research has shown vital differences among them.

From the AJPES, FINA, and GVIN databases we can obtain whole annual reports. The BonLine and Creditreform databases contain only some basic data from annual reports. Fina's database contains the most detailed information relating to financial statements for small and middle-sized businesses. The reason for this is that Croatia's businesses use international accounting standards and Slovenia uses our local standards, which allows more

synthetic information in financial statements for smaller businesses. Only the AJPES database contains supplements to the financial statements.

In Table 1 our assessment of the appropriateness of creditworthiness information for these five databases is shown. In our assessment we have estimated the number of calculated ratios in each group of ratios, which we note when defining creditworthiness information and ranking factors. We researched qualitative and quantitative factors

separately, and each group of included ratios. For each group of ratios we made a rank from 0 to 5. Zero (0) means that the database does not consider any ratio from the estimated group, 1 means it considers 1% -25 % ratios, 2 means that it considers 26%-50% of ratios, 3 means that it considers 51%-75% of ratios, 4 means that it considers 76%-99% of ratios, and 5 means that it considers all ratios from the group.

Table 1: Assessment of appropriateness of creditworthiness information

	AJPES	FINA	GVIN	BonLine	Creditreform
Quantitative ratios:					
1 capacity ratios	0	0	0	0	0
2 existings structure and changes of branch ratios	0	0	0	0	0
3 ratios of products' and services' quality	0	0	0	0	0
4 financing and investment ratios	2	1	2	1	1
5 turnover ratios	0	3	2	1	3
6 revenue, expenses, and income ratios	2	2	2	1	1
7 efficiency ratios	2	1	1	2	4
8 profitability ratios	3	2	2	2	2
9 liquidity ratios	0	0	1	0	0
10 ratios of investing in development and innovation	0	0	0	0	0
11 environment ratios	0	0	0	0	0
Qualitative ratios:					
12 general characteristics	3	2	3	3	3
13 business activity	1	1	1	1	1
14 resources/potentials	1	0	1	2	2
15 market orientation	0	0	0	2	3
16 other qualitative factors	0	0	0	0	0
Final assessment of appropriateness	0,88	0,75	0,94	0,94	1,25

Final assessment of appropriateness is calculated as an arithmetic proportion of values of included ratios into groups.

We can conclude that only a small range of ratios is included in the creditworthiness rank of researched databases. There is no database which would include all ratios. And there is no group of ratios with all ratios involved in ranking. Ratios in all databases are mostly the same ones – those which could be calculated or obtained from annual reports of businesses or registration data. So the-

re is no database which would include capacity ratios, existing structure, and changes of branch ratios, ratios of products' and services' quality, ratios of investing in development and innovation, environment ratios, and other qualitative ratios. Liquidity ratio is only partly involved in the GVIN database; no other database involves it.

Qualitative factors are limited to legal form, ownership, establishment, and founders. They only mention the business activity without specific data. Resources/potentials are limited to the number of employees, and some

databases involve a list of managers. Only the BonLine and Creditreform databases offered some information about more important buyers. Important suppliers are mentioned only in the Creditreform database. The reason for that is also the fact that data for obtaining such information is not included in the annual reports of businesses.

Because all databases include pretty much the same ratios, only the Creditreform database includes some more qualitative ratios. We believe, therefore, that the Creditreform database is the most appropriate for estimating the creditworthiness of Slovene and Croatian businesses.

The GVIN database is more appropriate for branch analysis, because it includes a comparison with four other businesses, the economy as a whole, and the branch in the country. No other database does this. In the GVIN database we can also find a comparison of the basic categories from annual reports and some ratios for the chosen business for the previous five years, and the same comparison for the branch to which the business belongs. In the balance sheet and income statement we can find calculations of similar ratios for the past two years. So we can conclude that the GVIN database is the most appropriate for branch analysis. But we must take into account the fact that this includes information only about Slovene branches.

The information contained in all five databases is based on historical data, so it is very risky to predict the future operation of businesses. A ranking of the businesses could be found in all databases. The Creditreform database provides the most specific one, because the rank is set between 100 and 600, while the other databases have a much tighter range. Because Creditreform contains information concerning most businesses all over the world, in our opinion it is the most appropriate database among those we researched.

6 Needed changes of analysed databases to be more dependable

Very important creditworthiness information which can not be found in any database is:

- capacity, structure, and changes of production;
- capacity, structure, and changes of sale;
- value and structure of revenues, expenses, and income;
- changes on revenues;
- liquidity ratios, especially net cash flow rate;
- ratios of investing in development and innovation activities, especially rate of new products/services in business program and savings from innovations compared to expenses;
- ratios of products' and services' quality, especially rate of products with defects and number of suggestions for improvement of quality;
- environment ratios;
- resources/potentials, especially information about facilities, innovations and investment activity;

- market orientation which include information about buyers, suppliers and competitors;
- information about reputation, strategies and environmental awareness.

Each database should include the information listed above, which is essential for assessment of businesses creditworthiness.

For better information it should be created from short-term reports and audited annual reports. And planned information about next periods should be added.

7 Conclusion

The success of a business is highly dependent on the recognition of business opportunities. Management and other employees need a lot of knowledge to support that recognition. Knowledge and information become the most important resources for any organization.

Information about the competition is also crucial for business success. This includes accounting and nonaccounting information, of which creditworthiness information plays a special role. Qualitative and quantitative factors are important for the purpose of ranking a business and estimating its creditworthiness. Databases which offer information about the creditworthiness of a business seldom include quantitative factors.

Our research analyzed the AJPES, FINA, GVIN, BonLine, and Creditreform databases. Among them, Creditreform takes into account the most ratios from all groups and offers the widest rank, so their ranking is the best. Consequently, we believe it is the best database for estimating the creditworthiness of a business. In our view such a research has not been conducted for Slovenia and Croatia, so we believe it could be useful for all users of research databases.

The GVIN database is the most appropriate for doing an analysis of a Slovene company, because it includes more comparisons among businesses and with branches and the economy as a whole.

At the end of the paper we recommended which information should be added to analysed databases to make them more dependable.

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Andreja Lutar Skerbinjek has been employed at the University of Maribor, Faculty of Economics and Business since 1993, initially as an assistant, and since 2003 as Assistant Professor in Accounting. She has lectured on Basic Accounting, Cost Accounting, and Computer Support of Accounting and Auditing. She has the degree of Specialist for Auditing of Annual Reports at the Faculty of Economics, University of Ljubljana, and a master's and doctoral degree of Business Science at the Faculty of Economics and Business, University of Maribor. She was awarded her doctoral degree in 2002. In 1995, she got the Fulbright Scholarship for research work and worked for five months at the Graduate School of Business, Fordham University, New York. Her bibliography contains 117 bibliographical units.

Pomen informacij za prepoznavanje poslovnih priložnosti

Za odločanje in prepoznavanje poslovnih priložnosti potrebujejo managerji veliko znanja in informacij. Pridobijo jih lahko na različne načine. Pomemben del informacij predstavljajo računovodske informacije med katerimi imajo poseben pomen bonitetne informacije o poslovnih partnerjih in konkurentih. Zajemajo informacije iz letnih poročil in mnoge druge informacije. Bonitetne informacije lahko vključujejo tudi neračunovodske informacije. Najhitrejši in najcenejši način pridobivanja informacij je preko interneta. Iskanje informacij o podjetjih iz posameznih spletnih strani vsakega izmed proučevanih podjetij je lahko zelo zamudno, zato lahko koristno uporabimo baze podatkov, ki vključujejo podatke o večini podjetij v določeni državi. Na internetu lahko najdemo veliko število takšnih baz podatkov. Nekatere izmed njih vsebujejo bolj uporabne, druge pa manj uporabne informacije. V prispevku proučujemo pomen znanja in informacij za prepoznavanje poslovnih priložnosti in primerjalno analiziramo primernost računovodskih informacij vsebovanih v petih najbolj uporabljenih bazah podatkov z informacijami o slovenskih in hrvaških podjetjih za oceno bonitete podjetij.

Ključne besede: poslovne priložnosti, znanje, računovodske informacije, bonitetne informacije, baze podatkov, poslovni part-

Cost Optimal Project Scheduling

Uroš Klanšek, Mirko Pšunder

University of Maribor, Faculty of Civil Engineering, Smetanova 17, 2000 Maribor
uros.klansek@uni-mb.si, mirko.pšunder@uni-mb.si

This paper presents the cost optimal project scheduling. The optimization was performed by the nonlinear programming approach, NLP. The nonlinear total project cost objective function is subjected to the rigorous system of the activity precedence relationship constraints, the activity duration constraints and the project duration constraints. The set of activity precedence relationship constraints was defined to comprise Finish-to-Start, Start-to-Start, Start-to-Finish and Finish-to-Finish precedence relationships between activities. The activity duration constraints determine relationships between minimum, maximum and possible duration of the project activities. The project duration constraints define the maximum feasible project duration. A numerical example is presented at the end of the paper in order to present the applicability of the proposed approach.

Key words: project management, scheduling, optimization, nonlinear programming, NLP

1 Introduction

Project scheduling is an important phase in the planning process of the project. While general project scheduling is performed before the submission of a tender, the executive project scheduling is performed before or during the realization of a project (Pšunder and Rebolj, 1991). Each activity within project network is characterized by its precedence relations, duration and resource requirements. In this way, execution of each project activity in normal duration requires employment of certain resources. In cases when faster execution of an activity is required, the additional resources at extra cost must be utilized. Traditional methods for cost optimal project scheduling include either Critical path method (CPM) or program evaluation and review technique (PERT) combined with trial-and-error procedure. This way, the cost optimal project schedule is achieved in the time-consuming analysis of various alternatives for start times and durations of activities.

To surmount the mentioned disadvantages, various different optimization methods have been proposed for the cost optimal project scheduling. Considering the exact mathematical programming methods, the cost optimal project scheduling has been handled mainly by different linear programming methods (e.g. Demeulemeester *et al.*, 1998; Achuthan & Hardjawidjaja, 2001; Möhring *et al.*, 2001; Vanhoucke *et al.*, 2002;). In these studies, the nonlinear cost functions were approximated with piece-wise linear functions. The nonlinear programming methods have been also proposed to solve optimal project scheduling problems with continuous nonlinear cost functions. A survey of literature and nonlinear time/cost trade-off models in this field were presented by Deckro *et al.*

(1995). However, in most of the published research works the cost optimal project scheduling was performed considering only the finish-to-start precedence relationships between project activities.

This paper presents the cost optimal project scheduling performed by the nonlinear programming approach, NLP. The nonlinear total project cost objective function is subjected to the rigorous system of the activity precedence relationship constraints, the activity duration constraints and the project duration constraints. The set of activity precedence relationship constraints is defined to comprise Finish-to-Start, Start-to-Start, Start-to-Finish and Finish-to-Finish precedence relationships between activities. The activity duration constraints determine relationships between minimum, maximum and possible duration of the project activities. The project duration constraints define the maximum feasible project duration. A numerical example is presented at the end of the paper in order to present the applicability of the proposed approach.

2 NLP problem formulation

The cost optimal project scheduling was performed by the nonlinear programming approach, NLP. The general NLP optimization problem may be formulated in the following form:

$$\begin{aligned} & \text{Min } z = f(x) \\ & \text{subjected to:} \\ & \quad h(x) = 0 \quad (\text{NLP}) \\ & \quad g(x) \leq 0 \\ & \quad x \in X = \{x \mid x \in R^n, x^{LO} \leq x \leq x^{UP}\} \end{aligned}$$

where x is a vector of the continuous variables, defined within the compact set X . Functions $f(x)$, $h(x)$ and $g(x)$ are the (non)linear functions involved in the objective function z , the equality and inequality constraints, respectively. All the functions $f(x)$, $h(x)$ and $g(x)$ must be continuous and differentiable.

In the context of the project scheduling optimization problem, the continuous variables define schedule parameters such as activity durations, start times, direct costs, etc. Equality and inequality constraints and the bounds of the continuous variables represent a rigorous system of precedence relationship constraints, the activity duration constraints and the project duration constraints of the project scheduling optimization problem.

3 NLP model formulation

Considering the general NLP formulation, the NLP model formulation for project scheduling optimization problem is more specific, particularly in terms of variables and constraints. This way, the proposed NLP model formulation consists of the objective function, the precedence relationship constraints, activity duration constraints and the project duration constraints.

The optimal project scheduling may include various objectives worthy of consideration. The most frequently used objectives for the optimal project scheduling are: the minimum project completion time and the minimum total project cost. In this paper, the following total project cost objective function is defined for the optimal project scheduling:

$$CT = \sum_{i \in I} C_i(D_i) + C_0 + C_1 \cdot DP \tag{1}$$

where objective variable CT represents the total project cost, set I comprises the project activities i , $i \in I$, $C_i(D_i)$ denotes the activity direct cost-duration function, C_0 is the initial project cost, C_1 is the daily project cost and DP is the project duration. This way, the total project cost objective includes direct cost of all project activities, the initial project cost and the indirect daily expenditures. The total project cost objective function is subjected to the rigorous system of the activity precedence relationship constraints, the activity duration constraints and the project duration constraints.

Each project activity i , $i \in I$, is connected with its succeeding activities j , $j \in J$ by fulfilling at least one of the following precedence relationship constraints:

Finish-to-Start:

$$S_i + D_i + L_{i,j} \leq S_j \tag{2}$$

Start-to-Start:

$$S_i + L_{i,j} \leq S_j \tag{3}$$

Start-to-Finish:

$$S_i + L_{i,j} \leq S_j + D_j \tag{4}$$

Finish-to-Finish:

$$S_i + D_i + L_{i,j} \leq S_j + D_j \tag{5}$$

where S_i is the start time of activity, D_i is the activity duration, $L_{i,j}$ is the lag/lead time between activity i , $i \in I$, and the succeeding activity j , $j \in J$.

Duration of each activity defined within project network is constrained not to pass defined minimum and maximum possible activity duration:

$$D_i - D_{min_i} \leq 0 \tag{6}$$

$$D_i - D_{max_i} \leq 0 \tag{7}$$

where D_{min_i} and D_{max_i} denote minimum and maximum possible duration of activity i , $i \in I$.

The project duration DP is determined as follows:

$$DP = S_{i\omega} + D_{i\omega} - S_{i\alpha} \tag{8}$$

where $S_{i\omega}$ and $D_{i\omega}$ represent the start time and the duration of the last project activity $i\omega$, $i\omega \in I$, and $S_{i\alpha}$ denotes the start time of the first project activity $i\alpha$, $i\alpha \in I$.

Project must be completed before the predetermined date. This way, the project duration is constrained not to exceed a given maximum feasible project duration:

$$S_{i\omega} + D_{i\omega} - S_{i\alpha} \leq D_{Pmax} \tag{9}$$

where D_{Pmax} denotes the maximum feasible project duration.

It should be noted that the start times of activities S_i , the activity durations D_i and the activity direct cost-duration functions $C_i(D_i)$ are included into NLP model formulation as positive variables.

4 Modelling and solving the NLP optimization problem

The developed NLP model formulation must be transformed into suitable modelling software. The spreadsheet-oriented optimizers, such as MS Excel Solver and What'sBest, are applicable tool for formulating small- and medium-sized models with reasonable number of parameters to be filled on a spreadsheet. On the other hand, the mathematical modelling languages, such as AMPL, GAMS, LINGO and MPL may be used for large, complex, one-of-a-kind optimization problems which may require many revisions to establish an accurate model. The modelling languages are especially applicable in cases where large number of functional constraints of the same type follow the same pattern. This way, the modelling language may simultaneously formulate all the constraints of the same type by simultaneously dealing with the variables of each type. Moreover, the modelling language hastens a number of model management tasks, such as accessing the

data, transforming the data into model parameters, modifying the model, and analyzing solutions from the model.

After the optimization model formulation is transformed into modelling software, the defined optimization problem may be solved by the use of a suitable solver. A general NLP class of optimization problems can be solved by several commercially available NLP solvers, such as CONOPT, KNITRO, LANCELOT, MINOS, NPSOL, etc.

5 Numerical example

In order to present the applicability of the proposed NLP approach, the paper presents an example of the cost optimal project scheduling. The considered example project consists of 14 non-splittable activities. The precedence

relationships and the lag times between succeeding activities are presented in Table 1. The initial project cost of 5500,00 € and the daily project cost of 2000,00 € are defined in the input data. The minimum durations, the maximum durations and the direct cost-duration functions of example project activities are given in Table 2. Maximum project duration is set to be 17 working days.

The objective of the optimization is to find a project schedule with optimal activity start times and durations so as to minimize total project cost, subjected to the activity precedence relationship constraints, the activity duration constraints and the project duration constraints.

The proposed optimization NLP model formulation was applied. A high-level language GAMS (General Algebraic Modelling System) (Brooke *et al.*, 1988) was used for modelling and for data inputs/outputs. CONOPT

Table 1: Precedence relationships and the lag times between project activities

Activity	Succeeding activity	Precedence relationship	Lag time (day)
1	2	Finish-to-Start	0
2	3	Start-to-Start	2
	4	Start-to-Start	2
3	5	Finish-to-Finish	3
4	6	Start-to-Finish	2
	7	Finish-to-Finish	4
5	8	Finish-to-Start	0
6	9	Start-to-Start	1
7	13	Finish-to-Start	0
8	10	Finish-to-Finish	4
	11	Finish-to-Finish	2
9	13	Finish-to-Start	2
10	12	Finish-to-Start	0
11	14	Finish-to-Start	0
12	14	Finish-to-Finish	1
13	14	Finish-to-Start	0

Table 2: Minimum duration, maximum duration and direct cost-duration functions of the project activities

Activity	Minimum duration (day)	Maximum duration (day)	Direct cost-duration function (€)
1	1	2	$5500 - 80D_1 - 40D_1^2$
2	1	3	$4300 - 65D_2 - 30D_2^2$
3	4	7	$5300 - 75D_3 - 35D_3^2$
4	1	4	$3400 - 50D_4 - 25D_4^2$
5	1	5	$4400 - 65D_5 - 25D_5^2$
6	2	6	$4600 - 70D_6 - 30D_6^2$
7	2	5	$4400 - 65D_7 - 25D_7^2$
8	1	3	$3100 - 40D_8 - 20D_8^2$
9	1	5	$4400 - 65D_9 - 25D_9^2$
10	2	6	$5100 - 75D_{10} - 30D_{10}^2$
11	7	9	$6700 - 100D_{11} - 50D_{11}^2$
12	1	2	$2600 - 40D_{12} - 15D_{12}^2$
13	4	8	$6700 - 90D_{13} - 40D_{13}^2$
14	2	5	$3800 - 55D_{14} - 20D_{14}^2$

D_1 to D_{14} denote the durations of the project activities labelled 1 to 14 measured in days.

(Generalized reduced-gradient method) (Drud, 1994) was used for the optimization.

Since the NLP denotes the continuous optimization technique, the optimization of the project schedule was performed in two successive steps. In the first step, the ordinary NLP optimization was performed to calculate the optimal continuous variables (e.g. start times, durations, etc.) inside their upper and lower bounds. In the second step, the calculation was repeated/checked for the fixed and rounded variables (from in the first stage obtained continuous values to their nearest upper discrete values). In this paper, a day was selected to be the discrete time unit for the example project schedule.

The minimum total project obtained by the NLP optimization cost was found to be 88555,00 €. The gained opti-

mal results include the optimal start times, durations and direct costs of the project activities. Table 3 summarizes the optimum results for the example project. The optimal project schedule is presented in Figure 1.

The obtained cost optimal solution was determined by the activity precedence relationship constraints, the minimum activity duration constraints (activities 1, 3, 4, 8, 12 and 14, see Table 2 and Fig. 1.), the maximum activity duration constraints (activities 2, 5, 6, 7, 9, 10, and 11, see Table 2 and Fig. 1.) and the project duration constraints. Since the calculated optimal duration of the 13th activity was equal to 7 days, the duration constraints on this activity were not decisive for the optimum solution in this case, see Table 2 and Fig. 1.

Table 3: Optimal results

Activity	Start time (day)	Duration (day)	Direct cost (€)
1	1	1	5380,00
2	2	3	3835,00
3	4	4	4440,00
4	4	1	3325,00
5	6	5	3450,00
6	1	6	3100,00
7	4	5	3450,00
8	11	1	3040,00
9	2	5	3450,00
10	10	6	3570,00
11	5	9	1750,00
12	16	1	2545,00
13	9	7	4110,00
14	16	2	3610,00
Direct project cost (€):			49055,00
Indirect project cost (€):			39500,00
Total project cost (€):			88555,00

Project scheduling with CPM and PERT methods considers only time dimension of the project activities. Accordingly, the minimization of the total project cost with traditionally used CPM and PERT methods must be performed in a time-consuming trial-and-error procedure of analysing different project schedule alternatives by varying the start times and the durations of the project activities. Moreover, doubt always exists as to whether or not the obtained project schedule is optimal.

On the other hand, the presented example shows that the total cost optimization of the project schedule performed by the NLP approach is carried out in a single uniform calculating process, where the start times and durations of project activities are considered simultaneously in order to obtain the minimum total project cost. The obtained maximum values for durations of the project activities 2, 5, 6, 7, 9, 10, and 11 demonstrate that the cost optimization of project schedules not necessarily minimize the project duration. In this way, the additional feature

of the total project cost optimization represents the advantage of the proposed NLP approach to project scheduling over the traditionally used CPM and PERT methods.

6 Conclusion

This paper presents the cost optimal project scheduling performed by the nonlinear programming approach, NLP. The nonlinear continuous total project cost objective function was subjected to the rigorous system of the activity precedence relationship constraints, the activity duration constraints and the project duration constraints. The set of activity precedence relationship constraints was defined to comprise Finish-to-Start, Start-to-Start, Start-to-Finish, and Finish-to-Finish precedence relationships between activities. The activity duration constraints were included to determine relationships between minimum, maximum and possible duration of the project activities. The project

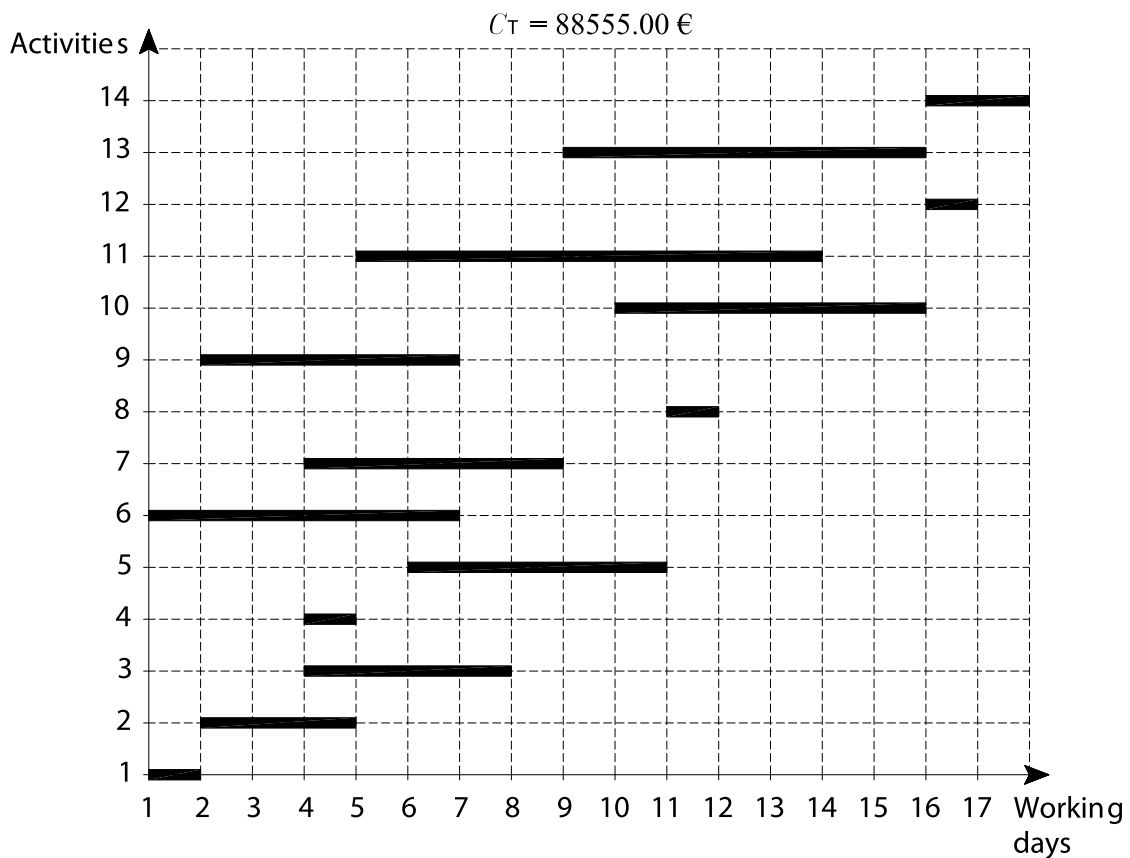


Figure 1: Optimal project schedule

duration constraints were defined to constrain the maximum feasible project duration.

The NLP model formulation was developed and applied for the cost optimal project scheduling. The input data within proposed NLP optimization model include: the project network with determined preceding and succeeding activities, the precedence relationships and the lag/lead times between activities, the minimum and the maximum durations of the activities, the initial project cost, the daily project cost, and the direct cost-duration functions of the activities. Linear or nonlinear functions may be used for direct cost-duration relationships of the project activities. For specified input data, the proposed NLP optimization model yields the minimum total project cost. The gained optimal results also include the optimal start times, durations and direct costs of the project activities. On account of the additional feature of the total project cost optimization, the proposed NLP approach to the project scheduling surpasses traditionally used CPM and PERT methods. Furthermore, the contribution provided an alternative tool which enables the cost optimal project scheduling to be carried out fast and in a single uniform calculating process. Since the proposed optimization approach enables an insight into the interdependence between the project duration and the total project cost, the decision-maker can more effectively estimate the effect of the project deadline on a total project cost before the sub-

mission of a tender. Finally, the project schedule can also be updated and compressed during the project execution in such a way to cause the minimum additional costs or to make maximum additional cost savings.

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Appendix

Notations

C_i	activity direct cost (variable)
CT	total project cost (objective variable)
C_0	initial project cost (constant)
C_1	daily project cost (constant)
D_i	activity duration (variable)
$Dmax_i$	maximum duration of activity (constant)
$Dmin_i$	minimum duration of activity (constant)
DP	project duration (variable)

$DPmax$	maximum project duration (constant)
I	set of project activities
J	set of succeeding project activities
L_{ij}	lag/lead time between the preceding and the succeeding activity (constant)
R^n	n-dimensional space of real numbers
S_i	start time of activity (variable)
X	compact set
x	vector of continuous variables
z	objective function

Subscripts

i	project activity (index)
j	succeeding project activity (index)

Superscripts

LO	lower bound
UP	upper bound

Uroš Klanšek is Assistant Professor of the Construction Management at the University of Maribor, Faculty of Civil Engineering. His current research interest is mainly focused on the optimization methods and their applications in engineering. He has presented his research work at several national and international conferences. He is also a co-author of several scientific papers published in national and international journals.

Mirko Pšunder is Professor of the Construction Management and Construction Economics and the Chair of Operational Civil Engineering at the University of Maribor, Faculty of Civil Engineering. His current professional and research interest is primarily in construction management and economics. He has introduced his research work at several national and international conferences. He is also author or co-author of several textbooks and research papers published in national and international journals.

Stroškovno optimalno planiranje projektov

V članku je predstavljeno stroškovno optimalno planiranje projektov. Optimiranje je izvedeno s pristopom nelinearnega programiranja, NLP. Nelinearna namenska funkcija celotnih stroškov projekta je podvržena rigoroznemu sistemu pogojnih neenačb časovnih odvisnosti med aktivnostmi, trajanja aktivnosti in trajanja projekta. Množica pogojnih neenačb časovnih odvisnosti med aktivnostmi vključuje časovne povezave konec-začetek, začetek-začetek, začetek-konec in konec-konec. Pogojne neenačbe trajanja aktivnosti določajo odnose med minimalnim, maksimalnim in možnim časom trajanja projektnih aktivnosti. Pogojne (ne)enačbe trajanja projekta omejijo maksimalni možni čas trajanja projekta. Za predstavitev uporabnosti predlagane ga pristopa je na koncu članka prikazan računski primer.

Ključne besede: projektni management, planiranje, optimizacija, nelinearno programiranje, NLP

Analiza vpliva dejavnikov izbire metod spreminjanja na evolucijsko spreminjanje gradbenih podjetij v Sloveniji

Peter Friedl¹, Roberto Biloslavo²

¹GRADIS skupina G, d.d. Ljubljana, Šmartinska 134 a, 1000 Ljubljana, Slovenija; peter.friedl@gradis-skupinag.si

²Univerza na Primorskem, Fakulteta za management Koper, Cankarjeva 5, 6000 Koper, Slovenija; roberto.biloslavo@fm-kp.si

Temeljni namen raziskave je proučiti vpliv dejavnikov izbire metod spreminjanja na uspešnost evolucijskega načina spreminjanja podjetij v slovenski gradbeni panogi. Pri zasnovi in izvedbi empirične raziskave smo uporabili kombinacijo kvalitativnega in kvantitativnega pristopa k raziskovalnemu delu. Ugotovitve raziskave o značilnostih uporabe proučevanih dejavnikov izbire metod evolucijskega načina spreminjanja bodo managementu omogočile učinkovitejšo izbiro izmed množice razpoložljivih metod spreminjanja ter uspešnejšo uporabo le-teh. Posledično lahko pričakujemo, da se bo izboljšala poslovna uspešnost podjetij, kar bo omogočilo njihovo bolj enakovredno soočenje s tujimi konkurenti, ki je za poslovne subjekte gospodarstva v post-tranziciji ključnega pomena.

Ključne besede: management spreminjanja organizacij, strateški management, Slovenija, gradbena panoga, dejavniki izbire metod spreminjanja.

1 Uvod

Spreminjanje podjetja lahko izhaja iz spontanih, intuitivnih managerskih ukrepov, kar je mogoče v enostavnih in preglednih podjetjih ter stabilnih zunanjih okoljih (Češnovar, 2003, str. 1). V kompleksnejših zunanjih in notranjih okoljih podjetja pa je primernejši zavesten, načrtovan in formaliziran proces spreminjanja, ki temelji na predpisanih pravilih spreminjanja procesov, struktur in sistemov, kar lahko poimenujemo tudi metoda ali "pristop k spreminjanju" (Strebel, 1992; Champy, 1996; Nohria, 1996; Mintzberg, 1996; Grint, 1997; Rigby, 2001; Drucker, 1995).

Svetovna literatura navaja tudi do 65 različnih pristopov k spreminjanju (Rigby, 2001, str. 1-3). Ob tem je velik pritisk na nastajanje novih pristopov, saj naj bi po Grintu (1997, str. 33) v zadnjih štiridesetih letih vsako leto nastal vsaj en nov pristop k spreminjanju. Po raziskavah svetovne hiše Bain & Company (Rigby, 2001, str. 3-11), ki je leta 2000 zajela 451 svetovnih podjetij v Severni in Južni Ameriki, Evropi in Aziji, so proučevana podjetja uporabljala povprečno 10 različnih metod spreminjanja. Iz literature (Nohria, 1996; Rigby, 2001) s področja managementa spreminjanja podjetij pa je razvidno, da na izbor optimalne metode vplivajo številni in različni dejavniki, povezani z zunanjim in notranjim okoljem podjetja.

Žal je malo metodološko primerno podprtih znanstvenih raziskav, ki bi vršnem managementu svetovale, katera

metoda je v danih okoliščinah najprimernejša, kakšni so lahko pozitivni in negativni učinki posamezne metode, katere metode se dopolnjujejo in katere izključujejo, katera so potrebna izhodiščna znanja ter nenazadnje, kakšna je primernost posamezne metode v odvisnosti od obstoječe kulture in interesnih koalicij v notranjem in zunanjem okolju podjetja (Češnovar, 2003, str. 1; Rosenzweig, 2007). Pravilen izbor metode spreminjanja omogoča izboljšanje značilnosti podjetja in posledično večjo poslovno uspešnost, medtem ko napačni izbor metode lahko povzroči prekomerno porabo sredstev podjetja, zmanjšanje finančne uspešnosti poslovanja, poslabšanje delovne klime in v skrajnem primeru tudi propad podjetja.

Po Mintzbergu (1996, str. 67) je management v vedno hitreje spreminjajočem se okolju dovzeten za najnovejša spoznanja iz teorije managementa in izbira tiste metode spreminjanja, ki mu ponujajo hitre in enostavne rešitve problemov. Kar 72 % anketiranih vršnih managerjev v raziskavi svetovne hiše Bain & Company (Rigby, 2001, str. 3-11) meni, da je za poslovni uspeh treba uporabljati le najnovejše metode spreminjanja. V isti raziskavi kar 81 % managerjev trdi, da pristopi obljublajo precej več, kot je dejanski učinek njihove uporabe (Rigby, 2001a). Poplava številnih metod spreminjanja, ki jih različni gurugi managementa, svetovne hiše in prodajalci informacijske tehnologije zaradi povečevanja svojega zaslužka priporočajo za rešitev skoraj vseh problemov podjetja, pa pri vršnem

managementu še dodatno vzbujajo nerealna pričakovanja (Češnovar, 2003, str. 2). Za vršni management je torej nad vse pomembno, da pozna temeljne zakonitosti uporabe metod spreminjanja, kar mu omogoča ločitev uporabnih metod za svoje podjetje od modnih muh, s čimer se lažje izogne uporabi neustreznih metod. Tezo potrjujejo ugotovitve raziskave Harvard Business School (Nohria, 1996, str. 216-217; Rigby, 2001) o uporabi pristopov k spreminjanju med 100 ameriškimi podjetji, kjer je bilo z doseženimi učinki nezadovoljnih kar 75 % anketiranih.

2 Management spreminjanja: primer gradbene panoge v Sloveniji

Raziskovalni problem, ki ga obravnavamo v članku, je proučiti vpliv dejavnikov izbire metod spreminjanja na uspešnost evoliucijskega načina spreminjanja organizacij. Temeljite spremembe zunanjega okolja, s katerimi so se soočila slovenska gradbena podjetja po letu 1991 (izguba nekdanjih jugoslovanskih trgov, soočenje z novimi investitorji na drugih trgih, spremenjene zahteve kupcev doma, vstop globalnih konkurentov na slovenski trg, prilagajanje poslovanja zahtevam EU, itd.), so podjetjem narekovale notranje prilagajanje v smislu tržne konkurenčnosti. Ker je bilo prilagajanje novim pogojem poslovanja v slovenskih podjetjih zaradi različnih vzrokov prepočasno in premalo intenzivno, je več podjetij na področju gradbeništva zašlo v težave, ki se kažejo kot občasne motnje v tekočem poslovanju ali celo v stečajih. Čeprav je od slovenske osamosvojitve minilo že več kot poldrugo desetletje, delež gradbenih podjetij v stečajnem postopku in podjetij, ki so v zaključnem računu izkazala izgubo, še vedno narašča. Povprečna zamuda pri plačevanju računov v podjetjih se ni izboljšala in je še vedno na ravni od 25 do 30 dni, delež zamujenih računov pa ostaja med 50 in 60 odstotki. Po povprečnem dnevnem znesku neporavnanih obveznosti (Ramovš et al., 2006, str. 19) se gradbeništvo med vsemi dejavnostmi nahaja na četrtem mestu, za predelovalnimi dejavnostmi, v katerih se nahaja tudi industrija gradbenega materiala. Vse navedeno nakazuje, da v slovenskem gradbeništvu obstaja velika verjetnost ene od oblik podjetniških kriz. Dolgoročno pozitivno poslovanje je mogoče uspešno rešiti in zagotoviti le v četrtini primerov, ko je kriza v podjetju že nastopila (Slatter, 1984, str. 19). Zato je smiselno krize preprečiti, še preden postanejo neobvladljive, k čemur lahko izdatno pripomore uporaba ustreznih metod spreminjanja podjetij.

Podjetje se na spremembe okolja lahko odziva z (Ansoff, 1990, str. 327) evoliucijskim prilagajanjem, ki vključuje prilagajanje podjetja spremembam v okolju, ali revolucijskim spreminjanjem usmeritev, ki terja velike in korenite spremembe dosedanjih usmeritev in načina dela (inovacijska in podjetniška odzivnost). Strebel (1992, str. 111-112) deli metode spreminjanja podjetij na manj tvegane – evoliucijske, ker so odporni proti spremembam majhni, in bolj tvegane – revolucijske, kjer lahko pričakujemo večje odpore. Podobno so po Buchananu (1997, str. 466) evoliucijski načini spreminjanja primerni, ko so potrebne

majhne spremembe v podjetju, ko je na voljo še dovolj časa za prilagoditev spremembam in ko so jim ključni udeleženci še naklonjeni.

Ker je bilo v tranzicijskem obdobju za slovensko gradbeno panogo značilno, da je prevladovala prenizka produktivnost in premajhna ustvarjena bruto dodana vrednost, slaba kvalifikacijska struktura zaposlenih, nepoznavanje tujih trgov, doseganje srednjih cenovnih razredov ter neustrezno zagotavljanje kakovosti vhodnih materialov, smo za proučevanje evoliucijskega načina spreminjanja v gradbeni panogi (predvsem dejavnikov in metod evoliucijskega načina spreminjanja organizacij) izbrali desetletno časovno obdobje od 1995 do 2005.

3 Namen in cilj raziskave

Temeljni namen je s kombinacijo kvantitativne in kvalitativne raziskave proučiti vpliv dejavnikov (zaposleni, posredni ekonomski interesi, skladnost s strateškimi usmeritvami podjetja, neposredni ekonomski interesi, socialnoekonomski in politični interesi, težnje k načrtovani realizaciji, vršni management, popularnost metod spreminjanja, razpoložljivi parametri za uvedbo sprememb) izbire metod spreminjanja na uspešnost evoliucijskega načina spreminjanja podjetij v slovenski gradbeni panogi, s ciljem vršnemu managementu zagotoviti informacije, ki jih potrebuje za optimalen izbor in uspešno uvedbo metod spreminjanja v podjetju. Veliko dejavnikov, ki vplivajo na uspešnost izvedbe načrtovanih sprememb, otežuje njihovo delovanje, zato je spreminjanje podjetja kompleksno in tvegano. Nabor dejavnikov izbire metod spreminjanja, ki ga bomo za potrebe raziskave razdelili v smiselne skupine, pomembno vpliva na izbor načina spreminjanja podjetja in uvajanja sprememb. Iz opredeljenega raziskovalnega problema je glavni cilj raziskave ugotoviti, ali je uporaba večjega nabora dejavnikov izbire metod spreminjanja pogojena z velikostjo podjetja in kako dejavniki izbire vplivajo na končni izbor metode spreminjanja.

4 Hipoteze

Iz predstavljenega temeljnega problema proučevanja ter dosegljivih relevantnih teoretičnih in empiričnih ugotovitev smo za doseg ciljev kvantitativne raziskave oblikovali naslednje temeljne znanstvene hipoteze raziskave, in sicer:

- *Hipoteza 1:* velikost podjetja vpliva na dejavnike izbire metod spreminjanja podjetja.
- *Hipoteza 2:* velikost podjetja vpliva na število uporabljenih metod evoliucijskega načina spreminjanja.
- *Hipoteza 3:* dejavniki izbire metod spreminjanja vplivajo na izbiro posamezne metode.

5 Metodologija

Za prepoznavanje vseh relevantnih dejavnikov izbire metod spreminjanja ter pridobivanje primarnih virov smo

v raziskavo vključili *polstrukturiran intervju* v vzorcem štirih vršnih managerjev. Interpretacija podatkov, pridobljenih s pomočjo intervjujev (ugotavljanje problemskega stanja v panogi in podjetjih, zbiranje potrebnih nenapisanih podatkov itd.) bo osnova za oblikovanje anketnega vprašalnika, namenjenega osrednji kvantitativni raziskavi.

Z vidika triangulacije je veljavnost predhodne kvantitativne raziskave zagotovljena z respondenti iz štirih različnih gradbenih podjetij. Kriteriji za izbiro vzorca so bili velikost proučevane populacije v raziskavi (22,5 % majhnih, 40 % srednjih in 37,5 % velikih podjetij) kot tudi dosežen ugled blagovne znamke podjetja v gradbeni panogi (Priznanje Republike Slovenije za poslovno odličnost, 2003), njegova finančna uspešnost ter doseženi certifikati serije SIST ISO 9001:2000 (kakovost poslovanja) in SIST EN 14001:1997 (ravnanje z okoljem).

Mere enakovrednosti (angl. *Equivalence Reliability*) kvantitativne raziskave smo zagotovili z metodo notranje konsistentnosti (angl. *Internal Consistency Method*). Napovedno veljavnost (angl. *Predictive Validity*) smo povečali oziroma zagotovili s predhodno opravljenimi polstrukturiranimi intervjuji. Anketni vprašalnik je vseboval dva sklopa zaprtih vprašanj s področja vplivov proučevanih metod spreminjanja na poslovanje podjetja. S pomočjo vprašalnika smo ugotavljali intenzivnost uporabe metod evolucijskega spreminjanja podjetij v slovenski gradbeni panogi in merili pogostost pojavljanja dejavnikov, ki vplivajo na izbiro posamezne metode spreminjanja v podjetju.

S prvim sklopom vprašanj smo ugotavljali, ali je bila v obdobju 1995–2005 določena proučevana metoda spreminjanja oziroma njeni posamezni elementi uporabljena v podjetjih slovenske gradbene panoge. Struktura prvega sklopa je temeljila na ključnih karakteristikah posamezne evolucijske metode spreminjanja. Za preverjanje hipoteze 2 je bilo v anketnem vprašalniku uporabljeno prvo vprašanje v obliki dihotomne lestvice z dvema možnima odgovoroma (da, ne) za vsako proučevano metodo spreminjanja podjetij. Vprašanje je bilo sledeče: *Katero izmed naslednjih metod spreminjanja podjetja ste uporabili v obdobju 1995–2005?* Anketirancem so bile na razpolago naslednje metode:

1. Skrajševanje pretočnih časov.
2. Strateško načrtovanje.
3. Celovito ravnanje s kakovostjo (angl. *Total Quality Management*).
4. Snovanje vizije in poslanstva.
5. Zunanje izvajanje (angl. *Outsourcing*).
6. Primerjalno presojanje (angl. *Benchmarking*).
7. Vertikalna integracija.
8. Oblikovanje ključnih konkurenčnih sposobnosti.
9. Merjenje nivoja zadovoljstva naročnikov.
10. Strategija rasti.
11. Reinženiring (angl. *Business Process Reengineering*).
12. Optimiranje stroškov po aktivnostih poslovnega procesa (ABC metoda).
13. Upravljanje odnosov s strankami (angl. *Customer Relationship Management*).
14. Upravljanje z znanjem (angl. *Knowledge Management*).

15. Strateško zavezištvo.

16. Sistem uravnoteženih kazalnikov (angl. *Balance Scorecard*).

Glavni namen drugega sklopa vprašanj je bil ugotoviti vzroke v notranjem in zunanem okolju podjetja, ki so pomembno vplivali na izbor proučevanih metod spreminjanja. Strukturo tega sklopa smo zasnovali na osnovi izhodišč za diagnozo stanja v podjetjih pred spreminjanjem, opredeljenih konceptov odzivanja podjetja na spremembe okolja, vpliva kulture podjetja na njegovo spreminjanje ter zasnovanih meril izbiranja in uvajanja metod spreminjanja.

Podatke za preverjanje hipotez 1 in 3 smo pridobili s pomočjo drugega vprašanja v anketnem vprašalniku: *V kolikšni meri so na izbiro metode spreminjanja v Vašem podjetju vplivali naslednji dejavniki?* Vprašalnik je ponudil naslednje možne dejavnike:

1. Intenzivnost sprememb v okolju.
2. Razpoložljiv čas za odziv podjetja na vplive okolja.
3. Nedoseganje postavljenih ciljev podjetja.
4. Razpoložljiva sredstva podjetja (finančna, človeška, materialna).
5. Znanje zaposlenih.
6. Pričakovani odpori k spremembam.
7. Skladnost s cilji podjetja.
8. Skladnost s strategijami, ki jih podjetje že izvaja.
9. Skladnost z metodami spreminjanja, ki jih podjetje že uporablja.
10. Kultura podjetja: vrednote, navade, običaji, vedenje, norme zaposlenih.
11. Kultura družbenega okolja: odnos do sprememb, pravica do dela, sprejemanje tveganja.
12. Interesi zaposlenih.
13. Interesi vršnega managementa.
14. Interesi sindikatov.
15. Interesi kupcev.
16. Interesi dobaviteljev.
17. Interesi lastnikov.
18. Interesi bank upnic.
19. Interesi države.
20. Interesi širše družbe.
21. Potreben čas za uvedbo spremembe v podjetju.
22. Potrebna sredstva za uvedbo spremembe v podjetju.
23. Spremembe v vršnem managementu podjetja.
24. Spremembe v odnosih moči znotraj poslovno-funkcijskih enot podjetja.
25. Poznavanje metode spreminjanja s strani vršnega managementa podjetja.
26. Predhodne izkušnje vršnega managementa z uvajanjem sprememb.
27. Popularnost metode spreminjanja v podjetju.
28. Popularnost metode spreminjanja v panogi.
29. Priporočila strokovne javnosti.
30. Pričakovane koristi od uporabe metode spreminjanja za podjetje.

V smislu jasnosti in razumljivosti vprašanj oziroma morebitnih podvajanj smo anketni vprašalnik pred pričetkom raziskave pilotsko testirali s pomočjo kontrolne sku-

pine, ki jo je sestavljalo šest vršnih managerjev, vključenih v raziskavo.

5.1 Vzorčni okvir

V registru Gospodarske zbornice Slovenije (2006) je bilo po kriteriju števila zaposlenih v gradbeništvu na dan 1. januarja 2005 (Ramovš et al., 2006, str. 46) po standardni klasifikaciji dejavnosti (SKD) iz panog 45.210 – Splošna gradbena dela in 45.230 – Gradnja cest, železniških prog, letališč in športnih objektov vpisano 85 podjetij z več kot 50 zaposlenimi. Od teh podjetij jih je imelo 5 oznako "v stečajju", zaradi česar so bila iz raziskave izločena. To pomeni, da je v raziskavo vključenih 80 podjetij, kar obenem predstavlja velikost proučevane populacije.

Na osnovi povprečnega števila delavcev, čistega prihodka od prodaje ter velikosti aktive ob koncu poslovnega leta kriterij 55. člena Zakona o gospodarskih družbah (ZGD-1) razvršča gospodarske družbe na mikro, majhne, srednje in velike (Državni zbor Republike Slovenije, 2006, str. 4405). Upošteva kriterije 55. člena ZGD-1 sestavlja proučevano populacijo v raziskavi 18 majhnih¹ (22,5 %), 32 srednje velikih (40,0 %) in 30 velikih podjetij (37,5 %).

5.2 Omejitve raziskave

Za potrebe raziskovalnega dela smo izbrali gradbena podjetja z več kot 50 zaposlenimi, ki zagotavljajo enakomerno zastopanost gospodarskih družb po kriteriju velikosti 55. člena ZGD-1. Pri razlagi ugotovitev empirične raziskave je treba upoštevati, da je izvedena v panogi, ki se v proučevanem obdobju nahaja v krizi (Ramovš et al., 2006) in se uvršča med najmanj rentabilne panoge slovenskega gospodarstva nasploh. Zaradi omejitev raziskave na proučevanje uspešnosti evlucijskega načina spreminjanja podjetij, desetletno časovno obdobje ter slovensko gradbeno panogo, rezultatov ne gre interpretirati kot splošne zakonitosti uporabe metod spreminjanja.

5.3 Izvedba raziskave

Med potekom anketiranja se je izkazalo, da je eno majhno podjetje šlo v likvidacijo (2005) in eno majhno v stečaj (2006), kar je pomenilo dve neustrezni enoti. Štiri podjetja so sodelovanje v raziskavi odklonila. V kvantitativni raziskavi je tako sodelovalo 78 gradbenih podjetij. Prejetih je bilo 74 veljavnih odgovorov oziroma dosežena 94,87 % odzivnost.

¹ ZGD-1 navaja: *majhna družba je družba, ki ni mikro družba in izpolnjuje vsaj dve od naslednjih meril: povprečno število delavcev v poslovnem letu ne presega 50, čisti prihodki od prodaje ne presegajo 7.300.000 EUR in vrednost aktive ne presega 3.650.000 EUR. Ker je 18 proučevanih podjetij od treh možnih meril izpolnilo obe drugi dve zakonsko opredeljeni merili: višino čistih prihodkov od prodaje ter vrednost aktive, so si v skladu z ZGD-1 pridobila status majhnih družb. Po drugi strani so ta podjetja presegla povprečno število delavcev 50, zato so bila avtomatično uvrščena v proučevano populacijo raziskave. Članek torej obravnava tudi majhna podjetja, ne le srednja in velika.*

Pri pregledu strukture realiziranega vzorca po velikosti gradbenih podjetij lahko ugotovimo, da je v raziskavi sodelovalo 15 majhnih podjetij (83,33 % odzivnost), 30 srednje velikih (93,75 % odzivnost) in 29 velikih podjetij (96,66 % odzivnost), kar pomeni, da je bila največja odzivnost dosežena med velikimi podjetji.

6 Ugotovitve raziskave

6.1 Metode evlucijskega načina spreminjanja

Anketirana podjetja so v preučevanem obdobju (1995–2005) v povprečju uporabila nekaj manj kot 9 metod evlucijskega načina spreminjanja, kar predstavlja nekaj več kot polovico (54,90 %) vseh šestnajstih proučevanih metod v raziskavi. Rezultat se bistveno ne razlikuje glede na velikost podjetja, saj so velika in majhna podjetja uporabila v povprečju približno 9 metod, srednja pa nekaj več kot 8. V nadaljevanju so predstavljeni rezultati za vsako metodo spreminjanja posebej glede na velikost podjetja po kriteriju 55. člena ZGD-1. Največkrat uporabljena metoda spreminjanja je formalizirano strateško načrtovanje, ki jo je uporabilo 77,00 % vseh podjetij v raziskavi.

Med velikimi podjetji je to metodo skupaj s snovanjem vizije in poslanstva uporabilo 86,20 % podjetij, med majhnimi pa štiri petine. Za slednje velja, da jih je enak delež uporabilo metodo optimiranje stroškov po aktivnostih poslovnega procesa ter metodo oblikovanje ključnih konkurenčnih sposobnosti. Za srednja podjetja to ni največkrat uporabljena metoda, saj jo je poleg snovanja vizije in poslanstva ter oblikovanja ključnih konkurenčnih sposobnosti uporabilo 66,70 % podjetij, za razliko od metode optimiranje stroškov po aktivnostih poslovnega procesa, ki jo je uporabilo 76,70 % podjetij. Omenimo naj še, da sta najmanjkrat uporabljeni metodi sistem uravnoteženjih kazalnikov in primerjalno presojanje, ki ju je uporabilo manj kot tretjina slovenskih gradbenih podjetij v raziskavi.

6.2 Dejavniki izbire metod spreminjanja

Anketiranci so s pomočjo Likertove petstopenjske lestvice od 1 (popolnoma nepomembno) do 5 (zelo pomembno) ocenjevali pomembnost tridesetih dejavnikov, ki vplivajo na izbor metod evlucijskega spreminjanja gradbenih podjetij. Dejavniki so bili oblikovani na podlagi interpretacije podatkov, pridobljenih s pomočjo predhodno izvedenih polstrukturiranih intervjujev in kontrolne skupine šestih vršnih managerjev.

V nadaljevanju so predstavljene povprečne vrednosti glede na velikost podjetij skladno s kriterijem 55. člena ZGD-1. Gradbena podjetja so dejavnike na splošno ocenila kot srednje pomembne – skupna povprečna ocena namreč znaša 3,32. Kljub temu je pomembnost dejavnikov ocenjena precej različno: interesi države so najmanj pomembni (2,31), najbolj pa interesi lastnikov (4,23), za katere velja, da njihova pomembnost narašča z velikostjo podjetja. Za srednja podjetja so poleg interesov lastnikov (4,20) najpomembnejši interesi vršnega managementa (4,27). Pri majhnih podjetjih po pomembnosti izstopa predvsem znanje zaposlenih (4,13), pomembni pa so še interesi lastnikov (3,87), razpoložljiva sredstva podjetja (3,73) ter kultura podjetja (3,67). V splošnem velja trditev, da pri izbiri metod spreminjanja tovrstne dejavnike najmanj upoštevajo majhna podjetja.

Zaradi premajhnega števila enot, zbranih v vzorcu, statistična metoda analiza glavnih komponent (angl. *Component Analysis*) ni bila izvedljiva za sklop vseh tridesetih dejavnikov izbire metod spreminjanja skupaj, zato smo jih po vsebinskem ključu trditev razdelili na dve skupini. V nadaljevanju smo analizo glavnih komponent izvedli za vsako skupino posebej. Iz prve skupine se je izoblikovalo po šest, iz druge skupine pa po tri dimenzije, kar pomeni, da smo skupaj izoblikovali devet *dimenzij* dejavnikov izbire metod evolucijskega spreminjanja (glej tabelo 1).

Vrednosti Cronbachovih koeficientov so sprejemljive (nad 0,60), razen pri dveh dimenzijah, sestavljenih zgolj iz po dveh trditev. Omenjenih dimenzij zaradi vsebinskih razlogov ne moremo združiti s katero od preostalih dimenzij.

Najpomembnejšo vlogo (glej tabelo 2) pri izbiri najustreznejše metode igrajo neposredni ekonomski interesi

Tabela 1: Mere enakovrednosti z metodo notranje konsistentnosti

Dimenzije dejavnikov izbire metod spreminjanja gradbenih podjetij	Cronbachov koeficient konsistentnosti lestvice (α) ²	Število trditev
Zaposleni	0,675	5
Posredni ekonomski interesi	0,696	4
Skladnost s strateškimi usmeritvami podjetja	0,732	3
Neposredni ekonomski interesi	0,678	4
Socialnoekonomski in politični interesi	0,559	2
Težnje k načrtovani realizaciji	0,755	2
Vršni management	0,757	5
Popularnost metod spreminjanja	0,671	3
Razpoložljivi parametri za uvedbo sprememb	0,514	2

Tabela 2: Povprečne vrednosti dimenzij dejavnikov izbire metod spreminjanja

Dimenzije dejavnikov izbire metod spreminjanja gradbenih podjetij	Velikost podjetij po ZGD-1			Skupaj
	Velika	Srednja	Majhna	
Zaposleni	3,2760	3,4270	3,3730	3,3570
Posredni ekonomski interesi	2,9655	3,1583	2,9667	3,0439
Skladnost s strateškimi usmeritvami podjetja	3,7356	3,4778	3,3778	3,5586
Neposredni ekonomski interesi	4,0345	3,9000	3,5333	3,8784
Socialnoekonomski in politični interesi	2,5517	2,3000	2,1000	2,3581
Težnje k načrtovani realizaciji	3,6207	3,6500	3,5667	3,6216
Vršni management	3,6138	3,5333	3,2133	3,5000
Popularnost metod spreminjanja	2,6667	2,8222	2,5556	2,7072
Razpoložljivi parametri za uvedbo sprememb	3,2414	3,5167	3,4333	3,3919

² Kakovost merjenja v raziskavi smo ocenili s pomočjo kriterijev za ocenjevanje kakovosti merjenja (Ferligoj et al., 1995, str. 159) oziroma Cronbachovega koeficienta zanesljivosti α (vzorna kakovost: $\alpha \geq 0.80$; zmerna kakovost: $0.60 \leq \alpha < 0.80$; slaba kakovost: $\alpha < 0.60$ ali ni podatkov).

(3,88). Njihova pomembnost narašča z velikostjo podjetja. Naslednja po vrsti najpomembnejša je dimenzija, ki se nanaša na težnje k načrtovani realizaciji (3,62). Vse tri kategorije podjetij jo ocenjujejo zelo podobno.

Sledita dimenziji skladnost s strateškimi usmeritvami podjetja (3,56) ter vršni management (3,50) – njuna pomembnost narašča z velikostjo podjetja. Pomembni sta še dimenziji razpoložljivi parametri za uvedbo sprememb in zaposleni, ocenjeni nad srednjo vrednostjo 3 (srednje pomembno). Dimenziji socialnoekonomski in politični interesi (2,36) ter popularnost metod spreminjanja (2,71) sta manj pomembni.

6.3 Vrednotenje rezultatov

6.3.1 Hipoteza 1

Hipotezo smo preverili s pomočjo analize variance, s katero primerjamo povprečne vrednosti pomembnosti dimenzij posameznih dejavnikov izbire metod spreminjanja glede na kriterij velikosti podjetja po 55. členu ZGD-1. Za uporabo te metode je treba upoštevati predpostavko enakosti varianc, kar pomeni, da Levenov F-preizkus homogenosti varianc (angl. *Levene's Test for Equality of Variances*) ne sme biti statistično značilen.

Tabela 3: Analiza variance dejavnikov izbire metod spreminjanja podjetij glede na kriterij velikosti podjetja po 55. členu ZGD-1

Dimenzije dejavnikov izbire metod spreminjanja gradbenih podjetij	df	Povprečje kvadratov	F ³ -preizkus	α
Zaposleni	2	0,170	0,442	0,645
Posredni ekonomski interesi	2	0,330	0,568	0,569
Skladnost s strateškimi usmeritvami podjetja	2	0,798	1,393	0,255
Neposredni ekonomski interesi	2	1,253	2,587	0,082
Socialnoekonomski in politični interesi	2	1,094	1,212	0,304
Težnje k načrtovani realizaciji	2	0,035	0,038	0,963
Vršni management	2	0,821	1,765	0,179
Popularnost metod spreminjanja	2	0,395	0,736	0,483
Razpoložljivi parametri za uvedbo sprememb	2	0,595	0,996	0,374

Tabela 4: Analiza variance dejavnikov glede na kriterij števila zaposlenih v podjetju

Dimenzije dejavnikov izbire metod spreminjanja gradbenih podjetij	df	Povprečje kvadratov	F-preizkus	α
Zaposleni	2	0,064	0,166	0,848
Posredni ekonomski interesi	2	0,739	1,297	0,280
Skladnost s strateškimi usmeritvami podjetja	2	0,564	0,973	0,383
Neposredni ekonomski interesi	2	0,393	0,772	0,466
Socialnoekonomski in politični interesi	2	3,467	4,149	0,020
Težnje k načrtovani realizaciji	2	0,180	0,197	0,822
Vršni management	2	0,796	1,710	0,188
Popularnost metod spreminjanja	2	0,224	0,414	0,663
Razpoložljivi parametri za uvedbo sprememb	2	0,524	0,906	0,409

³ Predpostavko o enakosti (homogenosti) varianc preizkušamo z Levenovim F-preizkusom. Izvedemo ga v dveh korakih, in sicer: (1) v vseh skupinah izračunamo vrednosti nove spremenljivke V, ki so enake absolutnim vrednostim odklonov vrednosti spremenljivke Y od ocene pripadajoče aritmetične sredine skupine; (2) izvedemo postopek analize variance: na podlagi vrednosti nove spremenljivke V izračunamo vrednost Levenovega preizkusa FL kot razmerja med oceno variance med skupinami in oceno variance znotraj skupin (Košmelj in Rovar, 2000).

V kolikor ta predpostavka ne velja, je treba uporabiti neparametričen Tamhanov Post Hoc test (angl. *Tamhane's T2 test*). Izkazalo se je, da se povprečne vrednosti pomembnosti dimenzij dejavnikov statistično značilno ne razlikujejo glede na velikost podjetja (glej tabelo 3).

Z velikostjo podjetja pomembnost dimenzije socialnoekonomski in politični interesi narašča (majhna 2,10; srednja 2,30; velika 2,55). Z vsebinskega vidika to pomeni, da imajo večja podjetja močnejše in bolj organizirane sindikate, a tudi večje davčne obveznosti. S političnim vplivom je država še vedno večinska lastnica kapitala v večjih podjetjih, v nasprotju z majhnimi in srednjimi podjetji, ki so že lastninjena.

Na osnovi rezultatov hipoteze 1 ne moremo potrditi, prav tako ne v katerem koli njenem delu. Hipotezo 1 smo v nadaljevanju preverili tako, da smo z analizo variance skušali ugotoviti, ali se aritmetične sredine razlikujejo glede na človeški dejavnik – kriterij števila zaposlenih v podjetju (glej tabelo 4). Predhodno smo preverili še enakost (homogenost) varianc.

Le pomembnost dimenzije dejavnikov socialnoekonomski in politični interesi statistično značilno povečuje z velikostjo podjetja ($F = 4,15$; $\alpha = 0,02$), v tem primeru s poudarkom na človeškem faktorju. Povprečna vrednost te dimenzije v podjetjih s 50–75 zaposlenimi znaša 1,96, v podjetjih s 76–180 zaposlenimi 2,46 ter v podjetjih z več kot 180 zaposlenimi 2,69. Tudi upošteva ta kriterij hipoteze 1 ne moremo potrditi v celoti, lahko pa jo v delu, ki se nanaša na to dimenzijo. Rezultati testiranj hipoteze 1 so pokazali, da med dejavniki izbire metod spreminjanja na velikost podjetja vpliva le dimenzija socialnoekonomski in politični interesi, toda le po kriteriju števila zaposlenih, ne pa tudi po kriteriju 55. člena ZGD-1. Hipotezo 1 lahko torej potrdimo le delno.

6.3.2 Hipoteza 2

Rezultati so pokazali (glej tabelo 5), da najmanjše število podjetij uporablja 0–4 metode spreminjanja; teh je deset

oziroma 13,50 % sodelujočih podjetij, od katerih eno sodi v skupino majhnih, šest v skupino srednjih in tri v skupino velikih. Največje število – sedemindvajset oziroma 36,50 % sodelujočih gradbenih podjetij uporablja 5–8 metod spreminjanja, od katerih sodi pet v skupino majhnih, dvanajst v skupino srednjih in deset v skupino velikih podjetij. Triindvajset oziroma 31,10 % sodelujočih podjetij uporablja 9–12 metod spreminjanja, od katerih sodi sedem podjetij v skupino majhnih, pet v skupino srednjih in enajst v skupino velikih podjetij. Štirinajst oziroma 18,90 % sodelujočih podjetij uporablja 13–16 metod spreminjanja, od katerih sodita dve v skupino majhnih, sedem v skupino srednjih in pet v skupino velikih.

Samo eno od majhnih podjetij uporablja 0–4 proučevane metode in le dvoje majhnih gradbenih podjetij uporablja 13–16 metod spreminjanja podjetij.

Pregled pridobljenih podatkov po skupinah podjetij je pokazal (glej tabelo 6), da od majhnih podjetij 6,60 % uporablja 0–4 metod spreminjanja, 33,30 % jih uporablja 5–8 metod spreminjanja, 46,60 % jih uporablja 9–12 in 13,30 % majhnih podjetij uporablja 13–16 metod.

Od sodelujočih srednje velikih gradbenih podjetij jih 20,00 % uporablja 0–4 metode spreminjanja, 40,00 % jih uporablja 5–8 metod spreminjanja, 16,70 % jih uporablja 9–12 metod spreminjanja, medtem ko 13–16 metod spreminjanja uporablja 23,3 % srednjih podjetij. Velika podjetja v 10,30 % uporabljajo 0–4 metod spreminjanja, 5–8 metod spreminjanja jih uporablja 34,50 %, 13–16 metod spreminjanja jih uporablja 17,20 %, medtem ko jih največ, kar 37,90 % velikih podjetij, uporablja 9–12 metod spreminjanja).

Iz pridobljenih podatkov pri preverjanju hipoteze 2 je s pomočjo opisne statistike razvidno, da velika podjetja po kriteriju 55. člena ZGD-1 – razen v tretji skupini metod (9–12), kjer so v večini (47,80 %) – ne uporabljajo večjega števila metod spreminjanja podjetij, zato postavljene hipoteze ne moremo potrditi. Na podlagi vrednosti Hi kvadrat statistike (angl. *Chi-Square Tests*), ki znaša 6,06, torej ne moremo potrditi povezanosti med številom uporabljenih

Tabela 5: Uporaba metod spreminjanja v odvisnosti glede na velikost podjetja

Število metod	Uporabniki 0-4 metod		Uporabniki 5-8 metod		Uporabniki 9-12 metod		Uporabniki 13-16 metod		Uporabniki skupaj	
	Število	% ^a	Število	% ^a	Število	% ^a	Število	% ^a	Število	% ^a
Majhna	1	10,00	5	18,50	7	30,40	2	14,30	15	20,30
Srednja	6	60,00	12	44,40	5	21,70	7	50,00	30	40,50
Velika	3	30,00	10	37,00	11	47,80	5	35,70	29	39,20
Skupaj	10	100,00	27	100,00	23	100,00	14	100,00	74	100,00
Skupaj %		13,50		36,50		31,10		18,90		100,00

^a Delež sodelujočih podjetij v raziskavi.

Tabela 6: Struktura uporabljenih metod spreminjanja po skupinah podjetij

Število metod	Uporabniki 0-4 metod		Uporabniki 5-8 metod		Uporabniki 9-12 metod		Uporabniki 13-16 metod		Uporabniki skupaj	
	Števílo	% ^a	Števílo	% ^a	Števílo	% ^a	Števílo	% ^a	Števílo	% ^a
Majhna	1	6,60	5	33,30	7	46,60	2	13,30	15	100,00
Srednja	6	20,00	12	40,00	5	16,70	7	23,30	30	100,00
Velika	3	10,30	10	34,50	11	37,90	5	17,20	29	100,00
Skupaj	10		27		23		14		74	

^a Delež uporabljenih metod spreminjanja po skupinah podjetij.

metod in velikostjo podjetij, saj je tveganje več kot 5-odstotno ($\alpha = 0,42$).

Hipotezo 2 lahko potrdimo v delu, ki se nanaša na reinženiring. Med velikimi podjetji jih kar 58,30 % uporablja metodo reinženiranja, medtem ko ta delež med srednjimi podjetji znaša 33,30 %, med majhnimi pa le 8,30 %. Na tej podlagi lahko sklepamo, da uporaba te metode narašča z velikostjo podjetij.

Rezultat Hi kvadrat statistike je pokazal vrednost 6,28, kar pomeni relativno močno povezanost med uporabo metode reinženiranja in velikostjo podjetij, ob manj kot 5-odstotnem tveganju (dejansko 0,04). Obrazložitev za dobljene rezultate izhaja iz teoretičnih izhodišč. Ta narekujejo, da metoda reinženiranja ne pomeni le manjših sprememb, temveč korenito preoblikovanje obstoječega načina dela ali pogosto oblikovanje poslovnega procesa na popolnoma novih temeljih, s čimer se doseže znatno nižje stroške, višjo kakovost, boljši servis investitorja in hitrejšo odzivnost.

Zanimiva je tudi ugotovitev, da se med tistimi podjetji, ki uporabljajo največ metod spreminjanja (13 do 16), nahaja kar polovica srednje velikih podjetij. To je posledica dejstva, da so srednje velika podjetja bolj fleksibilna in prilagodljiva od velikih in pogosto togih sistemov, ki so bolj rigidni in se na daljši (proučevani) rok tudi težje spreminjajo. Po drugi strani imajo za razliko od manjših srednje velika podjetja na voljo več sredstev (finančnih, človeških, materialnih). Majhna podjetja kljub vsemu ne zaostajajo mnogo. To obenem zavrača bojazen, da s svojo majhnostjo morda ne bi bila dovolj reprezentativna za proučevani vzorec oziroma z (ne)izpolnjenimi rubrikami v anketi nekoristna za empirično raziskavo. Pri preverjanju hipoteze 2 je bilo ugotovljeno, da majhna slovenska gradbena podjetja uporabljajo pretežno 9–12 metod spreminjanja (46,60 %), pri srednjih podjetjih prevladujejo uporabniki 5–8 metod spreminjanja (40,00 %), medtem ko pri velikih podjetjih približno enakomerno prevladuje uporaba 9–12 (37,90 %) in 5–8 (34,50 %) metod spreminjanja podjetij.

Rezultati raziskave pri preverjanju hipoteze 2 se ujemajo z ugotovitvami raziskave ameriške svetovalne hiše Bain & Company, v kateri je leta 2000 sodelovalo 451 sve-

tovnih podjetij. Raziskava je pokazala, da manjša podjetja zaradi nižje kompleksnosti poslovanja in manjšega obsega sredstev uporabljajo manjši nabor pristopov (Rigby, 2001, str. 11). V podjetjih, ki uporabljajo 0-4 metode spreminjanja, vršni management politike podjetja ne dokumentira. Načrtovanje in izvajanje obvladuje v glavi. Neformalni načini vodenja politike podjetja so možni v enostavnih in preglednih podjetjih ter enostavnih zunanjih okoljih (Inkpen, 1995, str. 314-319).

Povzamemo lahko, da hipoteze 2 o vplivu velikosti podjetja na število uporabljenih metod spreminjanja ne moremo z dovolj veliko gotovostjo potrditi. Vendarle pa se izkaže, da obstaja povezanost med velikostjo podjetja in uporabo metode reinženiranja. Delež uporabnikov te metode je namreč najvišji med velikimi, najnižji pa med majhnimi podjetji.

6.3.3 Hipoteza 3

Kljub dejstvu, da proučevane metode spreminjanja sodijo v globalni okvir evolijskega načina spreminjanja, jih niti s statističnega niti z vsebinskega vidika ni bilo mogoče združiti v skupine. Pri dokazovanju hipoteze 3 smo sprva preverili Levenov F-test homogenosti varianc. Hipotezo smo testirali s pomočjo Studentovega t-preizkusa, ob upoštevanju predpostavke t. i. enakosti varianc (angl. *Equal Variances assumed*). V kolikor tej predpostavki ni zadoščeno oziroma je Levenova F statistika statistično značilna, se za preizkus uporabi neparametrično izvedbo t-preizkusa, ki homogenosti varianc ne predpostavlja (angl. *Equal Variances not assumed*).

Zanimalo nas je, ali se povprečne vrednosti pomembnosti posameznih uvedenih dimenzij dejavnikov izbire metod spreminjanja statistično značilno razlikujejo glede na to, ali so podjetja uvedla določeno metodo spreminjanja ali ne. V kolikor je povprečna vrednost posameznega dejavnika višja pri podjetjih, ki so uvedla posamezno metodo spreminjanja, gre sklepati, da je ta dejavnik pomembno vplival na izbor metode.

V hipotezi 3 smo predpostavili, da dejavniki izbire metod spreminjanja vplivajo na izbiro posamezne meto-

de spreminjanja. Rezultati Studentovega t-testa so podali naslednje ugotovitve:

- v primeru uvajanja metode 1 (skrajševanje pretočnih časov) obstajajo razlike med naslednjimi dejavniki: neposredni ekonomski interesi, težnje k načrtovani realizaciji in vršni management;
- v primeru uvajanja metode 2 (strateško načrtovanje) se je kot pomembnejša dimenzija dejavnikov izbire metod izkazala le dimenzija neposredni ekonomski interesi;
- pri uvajanju metode 3 (celovito ravnanje s kakovostjo) lahko izpostavimo dimenziji dejavnikov izbire metod spreminjanja vršni management in razpoložljivi parametri za uvedbo sprememb ($t = 2,03$; $\alpha = 0,05$);
- pri uvajanju metode 7 (vertikalna integracija) so se kot pomembnejše dimenzije dejavnikov izbire metod spreminjanja izkazale štiri, in sicer zaposleni, skladnost s strateškimi usmeritvami podjetja, neposredni ekonomski interesi in vršni management;
- za uvajanje metode 9 (merjenje nivoja zadovoljstva investitorjev) je bila najpomembnejša dimenzija dejavnikov izbire metod spreminjanja socialnoekonomski in politični interesi – z vsebinskega stališča je jasno razvidno, da proučevana dimenzija smiselno sovпада s potrošniškimi interesi investitorjev in posledično z njihovim zadovoljstvom;
- pri uvajanju metode 11 (reinženiring) sta se kot pomembnejši dimenziji dejavnikov izbire metod spreminjanja izkazali socialnoekonomski in politični interesi ter vršni management;
- pri uvajanju metode 16 (sistem uravnoveženih kazalnikov) se je kot pomembnejša dimenzija dejavnikov izbire metod spreminjanja ponovno izkazala le ena: skladnost s strateškimi usmeritvami podjetja ($t = 3,66$; $\alpha = 0,00048$).

Zasedem metod spreminjanja lahko potrdimo pomembnost dejavnikov izbire, za ostalih devet pa ne. To pomeni, da hipotezo 3 lahko le delno potrdimo.

7 Razprava

Metode spreminjanja so orodja za spreminjanje podjetja, kar je zahtevna in tvegana naloga, saj obsega obvladovanje veliko med seboj odvisnih dejavnikov. Anketirana podjetja so v proučevanem obdobju (1995–2005) empirične raziskave v povprečju uporabila 8,78 metod evlucijskega načina spreminjanja, kar predstavlja nekaj več kot polovico (54,90 %) vseh šestnajstih proučevanih metod v raziskavi. Rezultat se bistveno ne razlikuje glede na velikost podjetja, saj so velika podjetja uporabila v povprečju 9,21 metode, majhna 9,07 ter srednja 8,23 metode.

Največkrat uporabljena metoda spreminjanja je formalizirano strateško načrtovanje, ki jo je uporabilo kar 77,00 % vseh podjetij v raziskavi. Najmanjkrat uporabljene metode sta sistem uravnoveženih kazalnikov in primerjalno presojanje, ki ju je uporabilo manj kot tretjina vseh slovenskih gradbenih podjetij v raziskavi. Vsak pristop spreminjanja je optimalen v drugačnih okoliščinah in na

njegov izbor vplivajo mnogi dejavniki v zunanjem in notranjem okolju podjetja (Currid, 1994, str. 17). Omenjeno teoretično izhodišče je podlaga za izvedbo faktorske analize tridesetih dejavnikov izbire metod evlucijskega spreminjanja gradbenih podjetij. Pokazala je, da se dejavniki združujejo v devet dimenzij. Najpomembnejšo vlogo pri izbiri najustreznejše metode imajo neposredni ekonomski interesi (3,88), za katere velja, da njihova pomembnost narašča z velikostjo podjetja. Naslednja najpomembnejša je dimenzija, ki se nanaša na težnje k načrtovani realizaciji (3,62) in jo vse tri kategorije podjetij ocenjujejo zelo podobno.

S hipotezo 1 smo predvideli, da velikost podjetja vpliva na dejavnike izbire metod spreminjanja podjetja. To domnevo smo preverili z analizo variance. V prvem delu smo za velikost podjetja izbrali kriterij obsega podjetja po 55. členu ZGD-1. Izkazalo se je, da velikost na nobeno od dimenzij dejavnikov ne vpliva. V tem delu je torej hipoteza 1 v celoti zavržena.

V drugem delu smo za velikost podjetja izbrali število zaposlenih. V tem primeru se je izkazalo, da se skupine podjetij, razvrščene po omenjenem kriteriju, razlikujejo po pomembnosti dimenzije socialnoekonomski in politični interesi, saj pomembnost te dimenzije z velikostjo podjetja narašča. Vsebinska obrazložitev je enostavna: v podjetjih z večjim številom zaposlenih so namreč sindikati delavcev močnejši in pomembneje vplivajo na odločitve o spremembah.

Hipoteza 2 predpostavlja, da velikost podjetja vpliva na število uporabljenih metod evlucijskega načina spreminjanja. Preverili smo jo s pomočjo Hi kvadrat statistike. Izkazalo se je, da je predpostavka napačna, saj je statistično tveganje za njeno potrditev preveliko.

Analiza povezanosti uporabe posameznih metod z velikostjo podjetja je pokazala, da je delež uporabnikov metode reinženiringa najvišji med velikimi in najnižji med majhnimi podjetji. Na uporabo ostalih metod velikost podjetja ne vpliva. V hipotezi 3 smo predpostavili, da dejavniki izbire metod spreminjanja vplivajo na izbiro posamezne metode spreminjanja. Na podlagi rezultatov Studentovega t-testa lahko za sedem metod spreminjanja potrdimo pomembnost dejavnikov izbire, za ostalih devet pa ne. To pomeni, da hipotezo 3 lahko le delno potrdimo.

8 Sklep

Testiranje hipotez je pokazalo, da velikost podjetja ne vpliva na nobeno od dimenzij dejavnikov izbire metod spreminjanja. Podrobnejša analiza povezanosti uporabe posameznih metod z velikostjo podjetja je pokazala, da je delež uporabnikov metode reinženiringa najvišji med velikimi in najnižji med majhnimi podjetji. Za sedem evlucijskih metod spreminjanja so rezultati raziskave potrdili pomembnost dejavnikov izbire, za ostalih devet pa ne. Optimalen izbor metode spreminjanja zahteva dobro poznavanje ključnih lastnosti posamezne metode, značilnosti notranjega in zunanjega okolja, vplivov metode na notranje okolje podjetja ter skladnosti metode s cilji podjetja in obstoječimi metodami spreminjanja. Zgolj z opti-

mizacijo obstoječih procesov (inkrementalne spremembe) in posnemanjem najboljših praks tujih konkurentov slovenska gradbena podjetja ne bodo nikoli konkurenčna tujemu trgu.

Rezultati empirične raziskave, proučitev teoretičnih modelov za izbiranje metod spreminjanja in celovit prikaz značilnosti dejavnikov izbire metod spreminjanja podjetij slovenskemu vršnemu managementu zagotavljajo lažjo identifikacijo potencialno uporabnih metod spreminjanja. Podajajo možnost izbora optimalne metode, kreativno prilagoditev metode glede na specifičnost okolja ter uspešnejšo uvedbo in integracijo metode z obstoječimi metodami v podjetju. Zaradi omejitev raziskave na slovensko gradbeno panogo rezultatov ne gre interpretirati kot splošne zakonitosti uporabe metod spreminjanja. Posplošena prepričanja v specifični in občutljivi panogi, kot je gradbena, namreč ne veljajo. Iz tega sledi, da so nadaljnje raziskave o vplivu dejavnikov izbire metod spreminjanja na uspešnost evolucionjskega načina spreminjanja nujne tudi v ostalih panogah slovenskega gospodarstva.

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Peter Friedl je inženir gradbeništva, diplomirani organizator, specialist managementa in magister znanosti. Ob delu nadaljuje z doktorskim študijem managementa na Fakulteti za management Univerze na Primorskem. Po višješolski diplomski letu 1994 na Fakulteti za gradbeništvo in geodezijo Univerze v Ljubljani se je 8 let intenzivno ukvarjal s problematiko projektnega managementa na področju gradbene komercialne, s katerega ima številne reference. Od leta 2004 pa v novoustanovljenem gradbenem koncernu GRADIS skupina G, d.d. Ljubljana na delovnem mestu pomočnika člana uprave za trženje vodi izvedbo vseh razvojnih projektov na področju visokih gradenj, in sicer od njihove idejne zasnove pa do same pridobitve pravnomočnega gradbenega dovoljenja. Njegovo ožje področje raziskovalnega dela vključuje razvijanje oziroma vpeljavo konceptov managementa spreminjanja v specifično in kompleksnost storitvenih dejavnosti gradbenih inženiring organizacij.

Roberto Biloslavo je izredni profesor za področje managementa na Fakulteti za management Univerze na Primorskem. Njegovo raziskovalno delo je usmerjeno v področje strateškega managementa, managementa znanja in managementa ekspertnih organizacij.

Vplivne skupine udeležencev v slovenski prehrambeni panogi

Roland Rusjan Figelj¹, Roberto Biloslavo²

¹Ulica Ivana Suliča 14/a, 5290 Šempeter pri Gorici, rusjanfigeljroland@gmail.com

²Univerza na Primorskem, Fakulteta za management Koper, Cankarjeva 5, 6000 Koper

Interesna teorija ima v managementu veliko privrženecov, pa tudi številne kritike, zato ne preseneča, da ostaja odprtih še veliko raziskovalnih vprašanj, na katera poskušajo raziskovalci odgovoriti. V pričujočem prispevku poskušamo odgovoriti na vprašanje, kako managerji v slovenskih podjetjih zaznavajo pomen posameznih udeležencev. Ti udeleženci so lastniki, management, zaposleni, odjemalci, dobavitelji in država. V prispevku so najprej predstavljeni rezultati raziskave v okviru tričlanske ekspertne skupine, nato rezultati raziskave, opravljene med slovenskimi managerji srednje velikih in velikih podjetij v predelovalni dejavnosti, v zadnjem delu pa rezultati primerjalne analize med ekspertno skupino in slovenskimi managerji. Rezultati primerjalne analize kažejo presenetljivo usklajenost med ekspertno skupino in slovenskimi managerji glede pomena posameznih udeležencev.

Ključne besede: strateški management, interesna teorija, vplivne skupine udeležencev, predelovalna dejavnost

1 Uvod

Vse od dela Freemana (1984) z naslovom *Strategic Management: A Stakeholder Approach* ima t. i. interesna teorija organizacije osrednji položaj v proučevanju managementa in organizacije. Interesno teorijo lahko povzamemo z nekaj naslednjimi definicijami: Organizacija je odprt hierarhični urejen družbeni sistem, ki ga ljudje oblikujejo zaradi lažjega uresničevanja lastnih interesov. Člani organizacije lastne interese dosegajo posredno preko doseganja trajnejših ciljev organizacije, organizacija pa jim v zameno zagotavlja nižje stroške iskanja, koordinacije in negotovosti, kot bi jih imeli, če bi na trgu nastopali kot posamezniki. Med organizacijo in njenimi člani se torej vzpostavi neko menjalno razmerje in kakovost tega razmerja vpliva na uspešnost doseganja ciljev organizacije. Organizacija pa ni vase zaprt sistem, izoliran od zunanje okolja (Scott, 1987), ampak je z okoljem povezana in od okolja tako ali drugače odvisna (Pfeffer, 1994), zato so njeni cilji in uspešnost njihovega doseganja posredno ali neposredno odvisni tudi od kakovosti menjalnih razmerij med organizacijo ter posamezniki, skupinami in drugimi organizacijami v njenem okolju (ti so t. i. zunanji udeleženci organizacije).

Na podlagi navedenega lahko zaključimo, da menjalna razmerja med organizacijo in njenimi člani ter med organizacijo in posamezniki, skupinami ter drugimi organizacijami v okolju temeljijo na interesih, ki izhajajo iz fizioloških in psihosocialnih potreb, želja in vrednot

udeležencev. Organizacija torej opravičuje svoj obstoj in dokazuje svojo uspešnost z izpolnjevanjem interesov udeležencev (Tavčar, 2002: 3), pri čemer pa so si ti interesi velikokrat nasprotujoči. Management ima za razrešitev teh nasprotij nekaj različnih možnosti, kot so zadovoljitev vseh različnih interesov, oblikovanje kompromisa med različnimi interesi, časovna izmenjava med različnimi interesi ali oblikovanje nove ustvarjalne rešitve, ki v osnovi razreši vprašanje nasprotij interesov.

Ker se zdi, da management še ne zmore oblikovati nove ustvarjalne rešitve, ker časovna izmenjava med različnimi interesi lahko dolgoročni politiki organizacije bolj škodi kot ne, in ker realno gledano ni mogoče enakovredno zadovoljiti vseh interesov, se zdi kompromis kljub njegovim omejitvam edina sprejemljiva možnost. Zato mora management opredeliti, katere interese katerih udeležencev bo prednostno zadovoljil in tako dosegel maksimalen možen pozitiven vpliv na delovanje organizacije. Seveda pri tem vrednote managerjev in njihovo razumevanje poslanstva organizacije pomembno vplivajo na način, kako managerji razvrstijo udeležence in njihove interese.

V nadaljevanju našega prispevka bomo najprej predstavili nekatera teoretična izhodišča interesne teorije organizacije, nato pa rezultate raziskave o tem, kdo so najpomembnejši udeleženci organizacije po mnenju slovenskih managerjev v predelovalni dejavnosti in primerjali te rezultate z mnenjem ekspertne skupine. Na podlagi tako pridobljenih rezultatov bomo oblikovali zaključke in priporočila za prakso in nadaljnje raziskave.

2 Interesna teorija

Na organizacijo lahko gledamo z različnih vidikov zato v strokovni literaturi zasledimo različne metafore o organizaciji, s katerimi avtorji poskušajo zajeti in opisati sicer nezdružljive poglede na organizacije kot take (Morgan, 1997; Bolman in Deal, 1997). V tem prispevku bomo izhajali iz interesne metafore o organizaciji, ki jo Morganova (1997) opisuje kot: »... delovanje organizacij izhaja iz interesov ljudi v notranjem in zunanjih okoljih ter vpliva na interese sodelavcev in drugih posameznikov, skupin itn.; organizacije so torej dinamično ravnovesje interesov.«

Da za uspešnost organizacije niso pomembni zgolj interesi lastnikov zasledimo v literaturi že leta 1976, ko sta Edmonds III in Hand (1976) izvedla raziskavo med ameriškimi podjetji na temo »Kateri so resnični dolgoročni cilji podjetij?« V tej raziskavi je bila sicer potrjena osnovna hipoteza, da je najpomembnejši cilj podjetja maksimiranje dobička. Poleg tega pa je veliko v raziskavi sodelujočih managerjev navedlo, da potrebujejo tudi kakovosten proizvod, da morajo biti dober delodajalec in drugo. Ideja o odgovornosti managementa do številnih udeležencev in ne samo do lastnikov je bila tako široko sprejeta, čeprav podrejena primarnemu cilju maksimiranja dobička.

Zamisel o tem, da se morajo podjetja zavedati, da ne obstajajo zgolj zaradi zadovoljevanja interesov lastnikov in managementa, ampak tudi zaradi interesov drugih skupin udeležencev znotraj in izven podjetja, je danes precej bolj široko sprejeta. Kot pravi Handy (2007: 7): »Podjetja, ki se vidijo le kot stroji za pridelavo denarja in ne upoštevajo potreb družbe, bodo slabo končala.« Mintzberg (2007) se pridružuje kritiki tistih managerjev, ki se ne ozirajo na interese širšega števila udeležencev, ampak jih zanima le osebni dohodek in njihov družbeni status. Kot pravi, je t. i. vrednost za delničarje grozen pojav, ki nima mesta v resnično demokratični družbi. Takšnega mnenja je tudi Handy (2007: 9–10), ko pravi: »Podjetja morajo spoznati, da so zelo pomemben del družbe. Njihova naloga ni samo ustvarjanje dobička za delničarje. Ljudi morajo prepričati, da podjetje koristi družbi, to pa vpliva na njihove vrednote in cilje ter jih spreminja. Še vedno velja, da je treba trdo delati in ustvarjati denar, vendar morajo ljudi znotraj in zunaj podjetja prepričati, da to počnejo pošteno in častno – da ne onesnažujejo okolja, ne goljufajo svojih strank idr. Staromodni managerji se na to požvižgajo. Verjamejo, da je vseeno, kako pridejo do denarja, dokler jim to uspeva. Trudim se, da bi ljudi prepričal, da bo zanje slabo, če ne bodo upoštevali družbenega vidika.«

Bistvo interesne teorije so različne skupine, ki so v razmerju z organizacijo (Thompson et al., 1991 v Mitchell, Agle in Wood, 1997), pri čemer je management, ki je edina skupina udeležencev, ki je v razmerju z vsemi ostalimi skupinami (Hill in Jones, 1992 v Mitchell, Agle in Wood, 1997), odgovoren za usklajevanje posameznih interesov udeležencev za doseganje uspešnosti in učinkovitosti organizacije. Podobno Clarkson (1994 v Clarke, 1998: 187) opredeljuje interesni pristop kot: »Podjetje je sistem udeležencev, delujočih v širšem družbenem sistemu, ki podjetju zagotavlja potrebno pravno in tržno infrastrukturo. Smo-

ter podjetja je zato ustvarjanje vrednosti za udeležence s preoblikovanjem njihovega vložka v dobrine in storitve.« Scholes in Clutterbuck (1998: 227) pa navajata, da se v sodobnem poslovnem svetu povečuje kompleksnost povezav med udeleženci podjetja in moč nekaterih, še pred časom marginalnih skupin. Ob tem pa ne gre pozabiti, da ima interesna teorija tudi veliko kritikov. Interesni teoriji tako očitajo (npr. Argenti, 1997), da s postavljanjem različnih udeležencev v enak položaj managementu ne daje jasnih usmeritev, katerim smotrom naj ta sledi.

Tudi po dobrih dveh desetletjih, odkar se je uradno oblikoval pojem interesne teorije, ostajajo odprta še številna vprašanja. Jones (1980 v Mitchell, Agle in Wood, 1997) je že pred časom postavil nekaj pragmatičnih vprašanj, na katera interesna teorija še vedno išče odgovor. Ta vprašanja so: »Kaj so te interesne skupine? Koliko skupin moramo zadovoljiti? Kateri njihovi interesi so najpomembnejši? Kako morajo biti njihovi interesi uravnoteženi? Koliko finančnih sredstev lahko nameni organizacija za zadovoljitev teh interesov?« V literaturi zasledimo različne odgovore na ta vprašanja. O tem, kaj so te skupine, meni Alkafaji (1989 v Mitchell, Agle in Wood, 1997), da so to skupine, ki jim je organizacija odgovorna, medtem ko je Freemanova (1984 v Mitchell, Agle in Wood, 1997) klasična definicija: »Udeleženec v organizaciji je vsaka skupina ali posameznik, ki lahko vpliva ali na katerega vpliva uspešno doseganje ciljev organizacije.« Kralj (1999: 70), pa pravi, da: »Vsi posamezniki, skupine in organizacije, ki imajo svoje interese v delovanju podjetja in morejo nanj tudi pomembno vplivati, so udeleženci podjetja.«

V splošnem zasledimo v literaturi različna mnenja o tem, kdo so najpomembnejši udeleženci. V zadnjih 15 letih smo se večkrat srečali s splošno znano izjavo, kot je: »Odjemalci pridejo vedno prvi na vrsto,« oziroma »kupec je kralj.« Prav na to izjavo je hotel odgovoriti Jackson (2001) z raziskavo o najvplivnejših udeležencih organizacije. V raziskavo je vključil sedem udeležencev organizacije, to so lastniki, managerji, zaposleni, odjemalci, tekmeči, lokalna skupnost in banke, ter poskušal ugotoviti, kdo so najpomembnejši. Z raziskavo je hotel predvsem izpodbiti izjavo, da so odjemalci vedno prvi. Rezultati raziskave so naslednji: na prvem mestu po pomembnosti udeležencev organizacije so managerji, na drugem mestu so zaposleni, na tretjem mestu so odjemalci, na četrtem mestu so tekmeči, na petem mestu je lokalna skupnost, na šestem mestu so lastniki in na zadnjem mestu so banke. Na podlagi te raziskave ne moremo potrditi znane izjave o odjemalcih. Enako mnenje srečamo tudi pri Brownu (1996), ki meni, da organizacija mora zadovoljiti interese zaposlenih pred interesi odjemalcev. Tudi Galbreath (2006) meni, da vsako podjetje mora gledati na zaposlene kot najpomembnejše udeležence.

Da bi lahko potegnili ločnico med tistimi, ki imajo večji interes v zvezi s podjetjem, in tistimi, ki imajo manjšega, ter med tistimi, ki imajo več moči vplivanja, in tistimi, ki je imajo manj, se posamezni avtorji odločajo za delitev med aktivne in pasivne udeležence (Campbell, 1997: 447), drugi pa med primarne in sekundarne udeležence (Mitchell, Agle in Wood, 1997). Winn (2001) tako navaja, da so

primarni udeleženci organizacije zaposleni, odjemalci, lastniki, lokalna skupnost, naravno okolje, dobavitelji, javne interesne skupine, mediji in država, pri tem pa opozarja, da je zelo tvegano posamezne skupine udeležencev obravnavati kot homogene skupine, ker se znotraj posamezne skupine med posamezniki prepletajo različni interesi.

Po drugi strani različni avtorji, kot so Mitchell, Agle in Wood (1997), menijo, da se pomembnost udeležencev lahko s časom spreminja, da pa je sicer pomembnost udeležencev odvisna od njihove moči za uresničitev lastnih interesov, legitimnosti in nujnosti njihovih interesov. Udeleženec, ki ima vse tri lastnosti, je zelo pomemben udeleženec, tisti, ki ima dve lastnosti, je srednje pomemben, in tisti z eno lastnostjo je manj pomemben udeleženec organizacije. Tudi Biloslavo (2006: 19) se pridružuje mnenju, da so udeleženci po pomembnosti različni, in navaja, da: »vplivni udeleženci (tisti, ki imajo interes, moč in željo svoj interes uresničiti) lahko svoje interese spremenijo v vplive, ki bolj ali manj pomembno delujejo na organizacijo – odvisno od tega, koliko moči in zavzetosti imajo udeleženci za uresničitev svojih interesov. Ker so na splošno možnosti, da bi ljudje uresničili interese, omejene in ker obstajajo med ljudmi individualne razlike glede potreb in vrednot, ti pri uresničevanju lastnih interesov drug drugega omejujejo ali podpirajo (oblikujejo interesna razmerja) glede na trenutne okoliščine.«

3 Empirična raziskava

3.1 Cilji

V naši raziskavi smo sledili štirim ciljem, in sicer:

- na osnovi teorije opredeliti najpomembnejše (primarne) skupine udeležencev,
- ugotoviti pomen posameznih skupin udeležencev podjetja po mnenju ekspertne skupine,
- ugotoviti pomen posameznih skupin udeležencev podjetja po mnenju slovenskih managerjev,
- primerjati rezultate o pomenu posameznih skupin udeležencev podjetja med ekspertno skupino in slovenskimi managerji.

3.2 Metodologija

Na podlagi pregleda strokovne literature o interesni teoriji smo v našo raziskavo vključili šest najpomembnejših udeležencev organizacije. Izbrali smo tri udeležence iz notranjega okolja in tri udeležence iz zunanjega okolja. Iz notranjega okolja smo izbrali lastnike, management in zaposlene, iz zunanjega okolja pa odjemalce, dobavitelje in državo/lokalno skupnost.

Za uresničitev drugega cilja smo uporabili AHP (*Analytic Hierarchy Process*) metodo ali metodo hierarhičnega analitičnega procesa. Avtor metode je ameriški matematik Thomas Saaty, namen metode pa je hierarhična razvrstitev posameznih skupin. Metoda¹ sloni na parni medsebojni primerjavi odločitvenih spremenljivk z uporabo 9-stopenjske preferenčne lestvice, ki je najbližja simulacija človeškega odločanja pri primerjavi »predmetov«. Ocene v 9-stopenjski preferenčni lestvici so po pomenu razvrščene na naslednji način: 1 = dejavnika sta enakovredna, 3 = dejavnik je nekoliko bolj pomemben, 5 = dejavnik je bolj pomemben, 7 = dejavnik je mnogo bolj pomemben, 9 = dejavnik je neizmerno bolj pomemben.

V okviru te metode smo v naši raziskavi uporabljali naslednje korake, kot jih navajata Biloslavo in Prevodnik (2006: 66–67):

1. Paroma primerjamo vse kriterije med seboj in jim tako določimo relativne preference glede na podano lestvico.
2. Relativne preference zapišemo v obliki obratno simetrične kvadratne matrike.
3. Izračunamo vsoto relativnih preferenc po posameznem stolpcu.
4. Vrednosti v tabeli normaliziramo tako, da jih delimo s posameznimi vsotami.
5. AHP vrednost za posamezno spremenljivko izračunamo kot aritmetično sredino po vrsticah. Kriterij oz. spremenljivka z najvišjo AHP vrednostjo je najpomembnejša za obravnavano zadevo.

Za uresničitev tretjega cilja raziskave smo uporabili 7-stopenjsko Likertovo ordinalno lestvico z ocenami, ki so segle od 1 (se popolnoma ne strinjam) do 7 (se popolnoma strinjam). Managerji so za vsako posamezno skupino izmed petih² opredeljenih skupin udeležencev presojali trditev: »Podjetja poskušajo med različnimi udeleženci primarno zadovoljiti interese X«.

Anketne vprašalnike smo obdelali tako, da smo za posamezno skupino udeležencev sešteli vse ocene in nato vsoto delili s številom anketirancev (teh je bilo 44). Tako smo dobili povprečno vrednost, ki smo jo nato normalizirali tako, da smo povprečno oceno za skupino udeležencev delili s skupno vsoto vseh povprečnih ocen.

3.3 Vzorec

Za izpeljavo raziskave smo potrebovali primarne podatke iz dveh vzorcev. Prvi vzorec je bil sestavljen iz ekspertne skupine, ki so jo sestavljali trije slovenski profesorji, in sicer en profesor s področja managementa, en profesor s področja marketinga in poslovne politike organizacije ter en profesor s področja računovodstva. S takšno sestavo ekspertne skupine smo dosegli strokovno različnost, kar

¹ Podrobnejši opis AHP metode bi presejal okvir tega dela, zato vabimo bralca, ki ga ta metoda posebej zanima, da si prebere številna dela avtorja metode Thomasa Saatyja ali delo Forman, E.H. & Selly, M.A. (2001). *Decision by Objectives: How to Convince Others that You are Right*, World Scientific Publishing, Singapore.

² Ker smo predpostavili, da managerji ne morejo verodostojno presojati o pomembnosti lastnih interesov za organizacijo, jih v ta del raziskave nismo vključili kot vplivno skupino udeležencev.

pomeni, da smo zajeli tako vidik managementa, zaposlenih, odjemalcev, dobaviteljev kot tudi finančni vidik to je predvsem vidik lastnikov in države. Anketiranje (pošiljanje vprašalnika) je potekalo po elektronski pošti.

Drugi vzorec je bil sestavljen iz managerjev srednje velikih in velikih podjetij s področja predelovalnih dejavnosti DA 15, tj. proizvodnja hrane, pijač in krmil (Standardna klasifikacija dejavnosti) v Sloveniji v letu 2007. V tej dejavnosti je 49 takšnih podjetij, v raziskavi je sodelovalo 44 podjetij, kar pomeni 90 odstotno odzivnost. Anketiranje (pošiljanje vprašalnika) je potekalo po elektronski pošti, po navadni pošti in na podlagi osebnih obiskov.

3.4 Omejitve raziskave

Raziskava ima nekaj omejitev, ki jih je treba pri tolmačenju rezultatov ustrezno upoštevati. Prva omejitev izhaja iz dejstva, da so v raziskavo vključeni zgolj managerji srednje velikih in velikih slovenskih podjetij iz predelovalne dejavnosti, torej posploševanje na druge panoge ni možno.

Raziskava je po svoji vsebini statična in ne dinamična. Realno je pričakovati, da se pomen posameznih udeležencev spreminja ne samo glede na panogo, ampak tudi glede na neko časovno obdobje. Odgovora na to vprašanje raziskava ne nudi in interpretacija rezultatov je možna zgolj na sedanje časovno obdobje.

Raziskava ne ločuje med posameznimi skupinami udeležencev oz. predpostavlja, da so te skupine homogene, kar je lahko vprašljivo, saj se posamezni akterji (tj. posamezniki, skupine in organizacije) znotraj ene skupine v določenih pogojih z vidika organizacije lahko med seboj bistveno razlikujejo. Vendar bi tak pristop k raziskavi onemogočil primerjavo med različnimi organizacijami, kar pa je v nasprotju s cilji te raziskave.

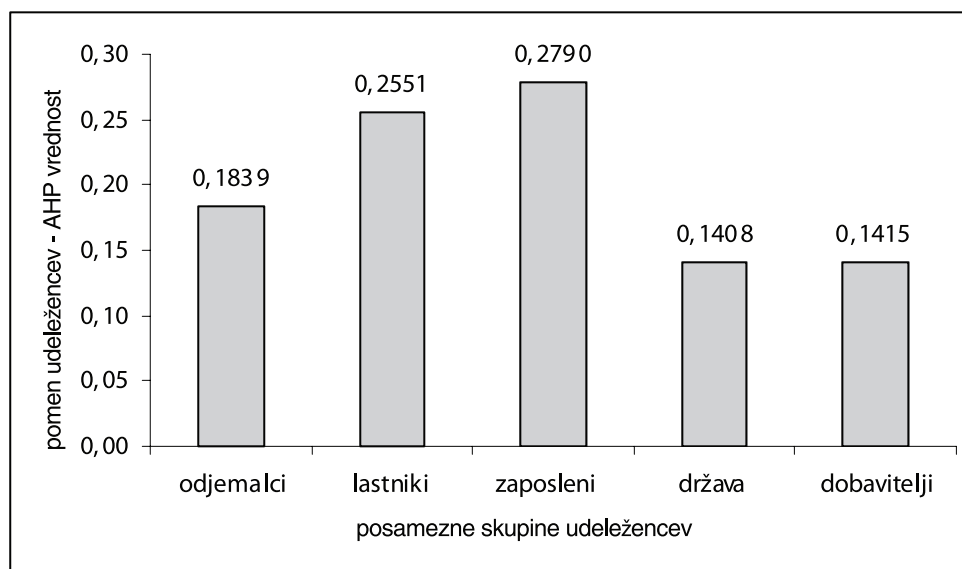
3.5 Rezultati

3.3.1 Rezultati ekspertne skupine

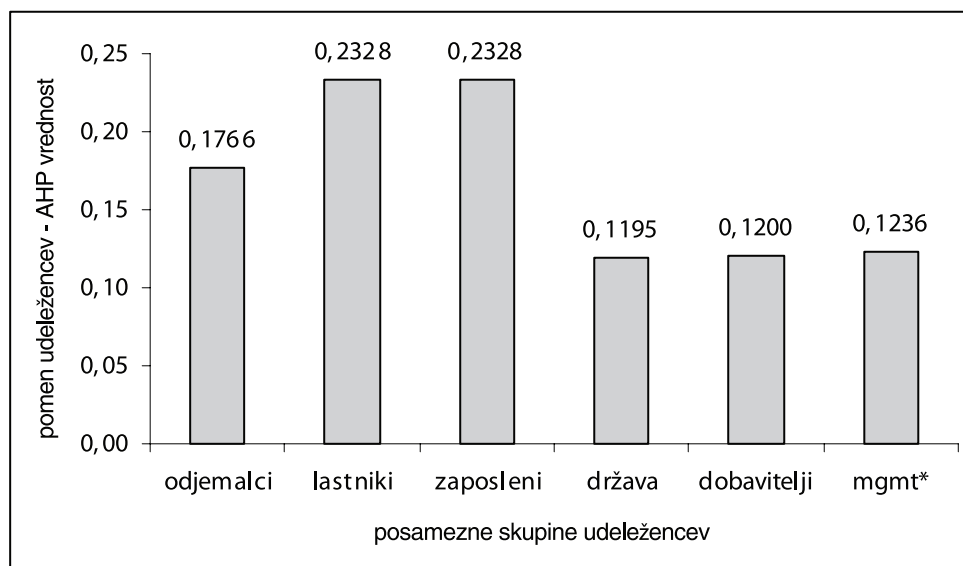
Kot smo predhodno omenili, smo najprej izvedli raziskavo pri ekspertni skupini, kjer smo uporabili metodo AHP. Rezultati raziskave o pomenu posameznih skupin udeležencev podjetja po presoji ekspertne skupine so prikazani v sliki 1 in sliki 2. V sliki 1 so prikazani rezultati brez managementa, ki smo ga izključili iz raziskave zaradi skladnosti posameznih skupin pri primerjanju z rezultati slovenskih managerjev. V sliki 2 so prikazani rezultati vseh šestih skupin udeležencev. Glede na to, da ekspertna skupina lahko verodostojno presoja o vseh šestih skupinah udeležencev, nas je zanimalo tudi, kakšen je pomen managementa v podjetju.

Kot je razvidno iz slike, meni ekspertna skupina, da so najpomembnejši oziroma najvplivnejši udeleženci organizacije zaposleni in lastniki. Ekspertna skupina postavlja na prvo mesto zaposlene z AHP vrednostjo 0,279. Na drugem mestu so lastniki z AHP vrednostjo 0,2551. Nadalje ekspertna skupina postavlja na tretje mesto odjemalce z AHP vrednostjo 0,1839. Po presoji ekspertne skupine so najmanj vplivni udeleženci dobavitelji ter država/lokalna skupnost. Tako na predzadnje mesto postavljajo dobavitelje z AHP vrednostjo 0,1415 in kot najmanj vplivne udeležence postavlja ekspertna skupina na zadnje mesto državo/lokalno skupnost z AHP vrednostjo 0,1408.

Kot vidimo iz slike, se vrstni red udeležencev po vključitvi managementa (mgmt*) v presojo ni bistveno spremenil, in sicer: med prvimi tremi najvplivnejšimi udeleženci ostajajo zaposleni, lastniki in odjemalci. Na prvih dveh mestih ostajajo zaposleni in lastniki, obe dve skupini imata enako AHP vrednost, tj. 0,2328. Na tretjem mestu ostajajo odjemalci, ki imajo nižjo vrednost za več kot 0,05 deleža, in sicer 0,1766. Prvi trije najvplivnejši udeleženci, ki so zaposleni, lastniki in odjemalci, imajo skupaj več kot



Slika 1 Presojanje vplivnih udeležencev s strani ekspertne skupine



Slika 2 Presojanje ekspertne skupine o vplivnih udeležencih vključno z managerji

0,64 AHP vrednosti, kar pomeni skoraj dve tretjini vpliva na organizacijo. Na četrtem mestu je management, ki ima AHP vrednost 0,1236, na petem mestu so dobavitelji z AHP vrednostjo 0,12 ter na zadnjem mestu najvplivnejših udeležencev je država/lokalna skupnost z AHP vrednostjo 0,1195. Kot vidimo, so ti trije udeleženci (management, dobavitelji in država/lokalna skupnost) dokaj izenačeni po vplivu na organizacijo oziroma po pomenu, ki ga imajo za presojo uspešnosti poslovanja. AHP vrednost teh treh udeležencev je okrog 0,12, medtem ko je skupna AHP vrednost okrog 0,36, kar predstavlja dobro tretjino vpliva na uspešnost organizacije, če uresničujemo njihove interese.

3.3.2 Rezultati raziskave med slovenskimi managerji

Drugo raziskavo na to temo smo izvedli med slovenskimi managerji srednje velikih in velikih podjetij s področja predelovalnih dejavnosti DA 15, tj. proizvodnja hrane, pijač in krmil (Standardna klasifikacija dejavnosti). V raziskavo smo vključili enake udeležence kot pri ekspertni skupini brez managementa. Management smo izključili iz nabora udeležencev, ker predpostavljamo, da managerji ne morejo verodostojno presojati o pomenu lastnih interesov za organizacijo. Tako smo v okviru tega dela raziskave imeli naslednje udeležence: lastnike, zaposlene, odjemalce, dobavitelje in državo/lokalno skupnost.

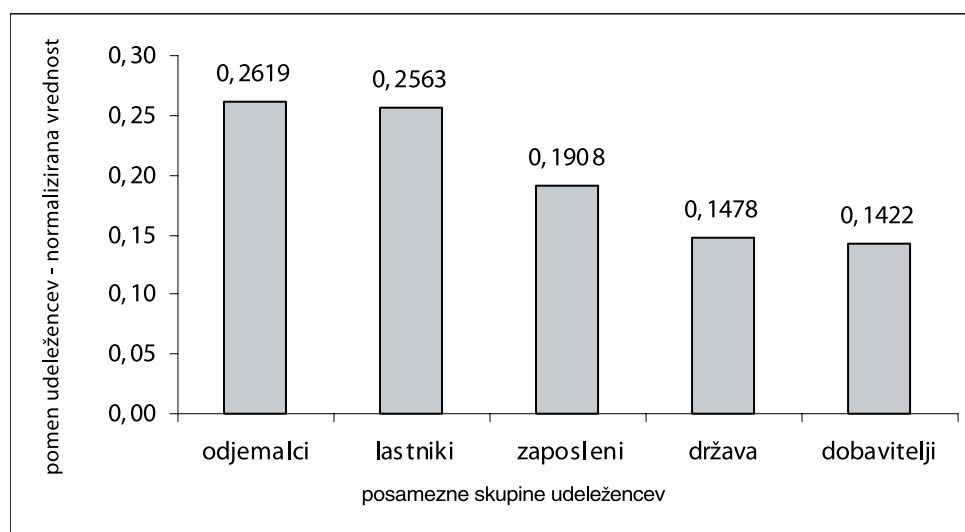
Rezultati raziskave, v kateri je sodelovalo 44 slovenskih managerjev, o pomenu posameznih skupin udeležencev podjetja so prikazani v sliki 3.

Iz slike 3 je razvidno, da slovenski managerji menijo, da zadovoljitev interesov odjemalcev največ prispeva k uspešnosti podjetja, njihova normalizirana vrednost je 0,2619. Takoj za odjemalci so lastniki podjetja, pri katerih je normalizirana vrednost 0,2563. Managerji so na tretje

mesto postavili zaposlene z normalizirano vrednostjo 0,1908. Iz tega ugotavljamo, da trije najpomembnejši udeleženci odjemalci, lastniki in zaposleni predstavljajo skupaj okrog 0,70 normalizirane vrednosti. Nadalje je na četrtem mestu država/lokalna skupnost z normalizirano vrednostjo 0,1478 in na zadnjem petem mestu po pomenu so dobavitelji z normalizirano vrednostjo 0,1422. Kot je razvidno iz slike 3, je pomen države/lokalne skupnosti približno enak pomenu dobaviteljev, to je okrog 0,14 po normalizirani vrednosti.

V nadaljevanju bomo poskušali utemeljiti, zakaj so slovenski managerji razvrstili udeležence po takšnem vrstnem redu. Slovenski managerji, ki so presojali pomen udeležencev, izhajajo s področja predelovalnih dejavnosti DA 15, tj. proizvodnja hrane, pijač in krmil po standardni klasifikaciji dejavnosti. Ta panoga je leta 2004 zašla v krizo, glavni razlog je bil vstop Slovenije v Evropsko unijo, kar je v to panogo posledično prineslo večjo, predvsem tujo konkurenco.

Tržne možnosti so se povečale tako za tuja kot za slovenska podjetja, vendar, kot kažejo podatki, so tuja podjetja pri tem bolj uspešna. Po podatkih AJPEŠ-a (Agencija Republike Slovenije za javnopravne evidence in storitve) o izvozi usmerjenosti podjetij vidimo, da je bil delež izvoza v prodaji v letu 2002 18,3 %, v letu 2004 16,6 % in v letu 2005 16,8 %. Kot ugotavljamo iz podatkov, se je s povečanjem tržnih možnosti po vstopu Slovenije v EU delež izvoza celo zmanjšal. Glavni razlog je v institucionalnih spremembah zunanjetrgovinskih režimov na trgih bivše Jugoslavije. Poleg tuje konkurence se je v obdobju od leta 2002 do 2006 povečala tudi domača konkurenca, in sicer je bilo v letu 2002 v tej panogi 390 gospodarskih družb, medtem ko smo imeli leta 2006 v tej panogi že 441 gospodarskih družb. Zanimiv je tudi podatek o donosnosti prodaje, ki je v letu 2003 znašala 2,3 %, v letu 2004 je bila -0,5 %, medtem ko je bila v letu 2005 donosnost



Slika 3 Presojanje udeležencev s strani managerjev

prodaje 0,1 %. Zgoraj predstavljeni podatki utemeljujejo, zakaj so slovenski managerji v prehrabeni industriji na prvo mesto postavili odjemalce kot najpomembnejše udeležence.

Na podlagi ugotovljenih razmer v panogi lahko nadalje sklepamo, zakaj so slovenski managerji postavili dobavitelje na zadnje mesto. Delno gre to prepisati dejstvu, da v prehrabeni industriji obstaja močna konkurenca med ponudniki surovin, deloma pa je vzrok temu to, da prehrabena industrija sodi med nizko tehnološko zahtevne dejavnosti³, kar ima za posledico, da podjetja iščejo dobavitelje, ki jim nudijo čim boljše finančne pogoje prodaje, kot so cene, plačilni pogoji idr. Podjetja so torej usmerjena predvsem v doseganje čim boljših nakupnih pogojev pri posameznem nakupu, dolgoročni odnosi z dobavitelji pa jih ne zanimajo.

Nadalje ugotavljamo, da slovenski managerji postavljajo lastnike takoj za odjemalce. V raziskavi, ki smo jo izvedli, se kar 86 % slovenskih managerjev strinja s trditvijo, da je primarni smoter vsakega podjetja povečevanje donosov lastniškega kapitala. Povečevanje vrednosti vloženega kapitala pa je interes lastnikov kapitala (Ulrich in Fluri, 1995 v Biloslavo, 2006), kar posledično pomeni, da slovenski managerji poskrbijo za zadovoljitev interesov lastnikov. To lahko utemeljujemo s splošnim dejstvom, da so lastniki tisti, ki postavijo managerje in jim zaupajo odgovornost za poslovanje organizacije. Če management ne zadovoljuje interesov lastnikov, ga ti odstavi.

Državo/lokalno skupnost postavljajo slovenski managerji med manj pomembne udeležence, kljub temu pa je ta skupina uvrščena pred dobavitelji. Utemeljitev te presoje managerjev lahko izhaja iz dejstva, da podjetja poslujejo v močni konkurenci ter morajo najprej zadovoljiti interese skupin, ki neposredno oziroma najbolj vplivajo na obstoj

podjetja. Uvrstitev države/lokalne skupnosti pred dobavitelji potrjuje dejstvo, da so dobavitelji najmanj pomembni udeleženci za slovenske managerje v prehrabeni industriji. Iz izkušenj pri vsakdanjem poslovanju se to še posebej izraža skozi finančno nedisciplino, ki je na slovenskem trgu še vedno prisotna. Posledično lahko rečemo, da so dobavitelji kot udeleženci posameznega podjetja deležni najmanj koristi.

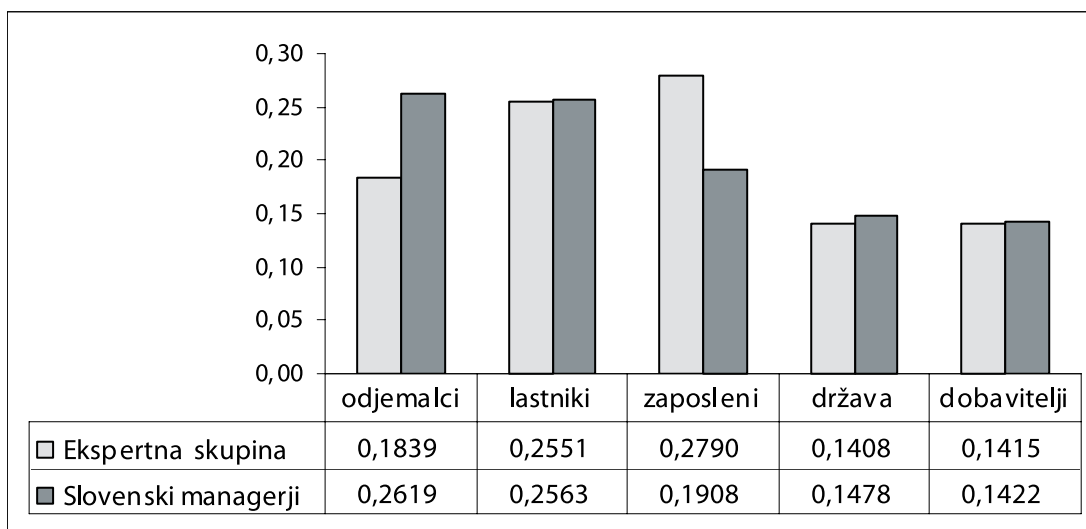
Nazadnje ostajajo še zaposleni, ki so jih slovenski managerji uvrstili na tretje mesto oziroma v sredino med vsemi udeleženci. Glede na razmere v panogi je nekako pričakovano, da so slovenski managerji uvrstili zaposlene za odjemalci in lastniki ter pred državo/lokalno skupnost in dobavitelji. Zadovoljitev interesov zaposlenih lahko razberemo iz podatka o stroških dela (v odstotkih) v dodani vrednosti, ta je bil v letu 2002 61,1 % ter v letu 2005 66,7 %. Podatek nam pove, da so stroški dela rasli hitreje kot dodana vrednost, kar lahko interpretiramo s povečevanjem interesov zaposlenih v primerjavi z interesi managementa.

3.3.3 Primerjava rezultatov med obema skupinama

Rezultati obeh raziskav, opravljenih med ekspertno skupino in slovenskimi managerji, so prikazani kot primerjalna analiza v sliki 4.

Po mnenju ekspertne skupine so najpomembnejši udeleženci zaposleni z vrednostjo 0,279, slovenski managerji pa se s tem ne strinjajo, saj jih oni postavljajo na tretje mesto z vrednostjo 0,1908. Drugi najpomembnejši udeleženci so tako po mnenju ekspertne skupine (z vrednostjo 0,2551) kot slovenskih managerjev (z vrednostjo 0,2563) lastniki. Na tretje mesto ekspertna skupina postavlja odje-

³ Razvrstitev gospodarskih družb glede na tehnološko intenzivnost po metodologiji OECD (Revision of the High-Technology and Product Classification).



Slika 4 Primerjava pomena udeležencev med ekspertno skupino in slovenskimi managerji

malce z vrednostjo 0,1839, medtem ko slovenski managerji postavljajo odjemalce na prvo mesto z vrednostjo 0,2619. Nadalje ekspertna skupina uvršča na četrto mesto dobavitelje z vrednostjo 0,1415, slovenski managerji pa jih postavljajo z vrednostjo 0,1422 na zadnje mesto. Po mnenju ekspertne skupine je najmanj vplivni udeleženec država/lokalna skupnost, ki jo uvrščajo na zadnje mesto z vrednostjo 0,1408, slovenski managerji pa državo/lokalno skupnost presenetljivo uvrščajo na predzadnje mesto z vrednostjo 0,1478, celo pred dobavitelji.

Kljub temu, da so ekspertna skupina in slovenski managerji na isto mesto uvrstili zgolj enega udeleženca, in sicer lastnike na drugo mesto, ugotovimo presenetljivo usklajenost med ekspertno skupino in slovenskimi managerji glede pomena posameznih udeležencev.

Kot ugotavljamo iz slike 4, je opazna velika usklajenost pri presoji pomembnih udeležencev pri treh od petih primarnih udeležencev. Po pomembnosti udeležencev vrednoti ekspertna skupina lastnike s približno vrednostjo 0,25, enako jih vrednotijo slovenski managerji, nadalje ekspertna skupina vrednoti državo/lokalno skupnost s približno vrednostjo 0,14, z enako vrednostjo jih vrednotijo tudi slovenski managerji. In nazadnje ekspertna skupina vrednoti dobavitelje s približno vrednostjo 0,14, enako jih vrednotijo tudi slovenski managerji. Med dvema skupinama prevladuje enotno mnenje, da so dobavitelji in država/lokalna skupnost med manj pomembnimi udeleženci. Takšne ugotovitve zasledimo tudi v raziskavi, ki jo je izvedel Jackson v letu 2001.

Ekspertna skupina in slovenski managerji se strinjajo s pomembnostjo primarnih udeležencev, kot so lastniki, država/lokalna skupnost in dobavitelji. Med ekspertno skupino in slovenskimi managerji v prehranski industriji ugotovimo razlike zgolj pri dveh udeležencih, in sicer pri zaposlenih in pri odjemalcih. Tako postavlja ekspertna skupina, kot smo že zgoraj navedli, zaposlene na prvo mesto, medtem ko slovenski managerji postavljajo na prvo mesto odjemalce, ekspertna skupina pa slednje

postavlja na tretje mesto, slovenski managerji pa na tretje mesto postavljajo zaposlene.

4 Zaključek

V okviru naše raziskave smo ugotavljali, kdo so najpomembnejši vplivni udeleženci organizacije tako v zunanjem kot v notranjem okolju na podlagi presoje ekspertne skupine in managerjev v slovenski prehranski industriji. Pri tem ugotavljamo, da so si člani ekspertne skupine in slovenski managerji enotnega mnenja, da so trije najvplivnejši udeleženci zaposleni, lastniki ter odjemalci. Razlika med ekspertno skupino in slovenskimi managerji je predvsem v dveh udeležencih, in sicer ekspertna skupina meni, da so zaposleni »največje bogastvo« za organizacijo, kar sicer zasledimo tudi v tuji literaturi, kot npr. pri Brownu (1996), Jacksonu (2001) in Galbreathu (2006). Nasprotno pa slovenski managerji menijo, da odjemalci pridejo vedno prvi na vrsto. Vendar obe skupini, tako ekspertna skupina kot slovenski managerji, postavljata odjemalce in zaposlene med najbolj vplivne udeležence. Ravno tako sta skupini enotnega mnenja, da med manj vplivne udeležence sodijo dobavitelji in država/lokalna skupnost. Na podlagi te raziskave lahko predpostavljamo, da se pogleda stroke in prakse na temo o najpomembnejših udeležencih podjetja v Sloveniji ob upoštevanju omejitev raziskave prav posebej ne razlikujejo. Pri managerjih je zaznati bolj tržno dojemanje organizacije, ki je usmerjeno navzven k odjemalcem in kjer je poudarek na kakovosti in inovativnosti proizvoda, tržnih poteh in cenovni privlačnosti, pri strokovnjakih pa je bolj izrazit humanistični pristop, ki poudarja zaposlene oz. človeški kapital kot temeljni vir trajnostne konkurenčne prednosti organizacije.

Je pa primerno ob tem poudariti mnenje Jacksona (2001), ki predlaga, da naj podjetja skladno z lastnimi potrebami spreminjajo prioriteto posameznih skupin udeležencev, ter mnenje Mitchella, Aglea in Wooda (1997),

ki opozarjajo managerje, naj ti nikoli ne pozabijo, da se pomembnost udeležencev spreminja od časa do časa v odvisnosti od njihovih interesov ter intenzivnosti potrebe po zadovoljitvi teh interesov.

Longitudinalna študija, ki bi spremljala dinamični vidik spreminjanja pomena posameznih skupin udeležencev, bi nam lahko ponudila odgovor o tem, kako učinkovito in uspešno slovenska podjetja usmerjajo in izrabljajo koalicije znotraj sebe in v okolju, v katerem delujejo.

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Roland Rusjan Figelj je leta 2003 diplomiral na UP, Fakulteti za management Koper. Po diplomiji je nadaljeval študij v vpisom na podiplomski magistrski študijski program Management. Trenutno pripravlja magistrsko nalogo iz področja strateškega managementa. Svoja znanja koristi v podjetju, ki posluje v mednarodnem okolju, v tem podjetju opravlja funkcijo vodje komercialne.

Roberto Biloslavo je izredni profesor za področje managementa na UP, Fakulteta za management Koper. Njegovo raziskovalno delo je usmerjeno v področje managementa, strateškega managementa, managementa znanja in družbene odgovornosti gospodarskih družb.

Uvajanje novosti za doseganje boljše usposobljenosti zaposlenih na železnicah po direktivah Evropske unije in interesih lastnika

Franc Zemljčič¹, Eva Jereb²

¹Pavlovski vrh 40a, 2259 Ivanjokovci, Slovenske železnice d.o.o., Kolodvorska 11, 1000 Ljubljana, franc.zemljic@slo-zeleznice.si

²Fakulteta za organizacijske vede, Univerza v Mariboru, Kidričeva c. 55a, 4000 Kranj, Slovenija eva.jereb@fov.uni-mb.si

V prispevku je predstavljeno dejstvo o obveznem prenosu evropske zakonodaje, ki jo Evropski parlament in Svet izdaja za področje transporta in infrastrukture, v nacionalne pravne rede ter prilagoditev nacionalnih predpisov in standardov. Zato je potrebno znanje zaposlenih nadgraditi, oziroma jih dodatno strokovno in jezikovno usposobiti v skladu z zahtevami nacionalne in evropske zakonodaje - direktiv. Na podlagi dognanih ugotovitev o razlikah in odstopanjih posameznih načinov usposabljanja, izvedenih s preučevanjem sistemov usposabljanj na železnicah v evropskih državah, je v prispevku poleg izdelanega modela za usposabljanje zaposlenih v skladu z direktivami Evropske skupnosti opredeljeno tudi preoblikovanje spremljajočih dejavnikov usposabljanja in uvedba novosti pri usposabljanju, ki imajo vpliv na kakovost usposabljanja za doseganje boljše usposobljenosti zaposlenih na železnicah.

Ključne besede: usposabljanje na železnici, direktive Evropske unije, model usposabljanja, uvajanje novosti, interesi lastnika.

1 Uvod

Podjetja se danes srečujejo z močno konkurenco, zato morajo za uspešno poslovanje in preživetje na trgu veliko vlagati v svoj razvoj, tehnologijo in zlasti v znanje in usposobljenost svojih zaposlenih. V veliko podjetjih so začeli reorganizirati funkcijo usposabljanja, da bi pridobili konkurenčno prednost pred drugimi na tržišču (Treven, 1998: 208 – 209). Liberalizacija trga prometnih storitev in prost pristop do železniške infrastrukture vzpostavlja konkurenčnost tudi na področju železniškega prometa v Evropi.

V interesu vsakega podjetja je, da bi imel izdelan takšen sistem razvoja napredovanja in usposabljanja kadrov, ki bi optimalno izkoristil svoje znanje, obstoječe kadrovske potenciale ter jih z nenehnim spremljanjem, izobraževanjem in usposabljanjem strokovno nadgrajeval in razvrščal na ustrezna delovna mesta ter prispeval k hitrejšemu razvoju podjetja. Usposabljanje kadrov pri delu bo zaposlenim omogočilo, da (Florjančič, 1998: 217):

- prevzamejo nove naloge,
- izboljšajo kakovost svojega dela,
- razvijejo nove sposobnosti,

- odpravljajo probleme,
- krepijo samozavest.

Stalno učenje in usposabljanje je nujno potrebno zaradi nenehnega tehničnega napredka in novih znanj, ki jih morajo obvladovati zaposleni, ne glede na to, kakšno delo opravljajo. Predvsem vodstveni kadri bodo morali spoznati, da je potrebno več vlagati v znanje, kajti nova znanja lahko veliko pripomorejo k boljšemu delu. Čeprav je (Možina idr., 1994: 471) usposabljanje aktivnost, ki organizacije veliko stane, vendar so mnoge spoznale, da gre za nepogrešljiv del njihovega življenja. V mnogih organizacijah po svetu posvečajo usposabljanju na delovnem mestu prav tolikšno pozornost kot rezultat. Zato je usposabljanje na delovnem mestu redno na delovnih urnikih, v nekaterih organizacijah celo zelo pogosto – vsaj enkrat na mesec. To sicer predstavlja določen strošek, vendar so povsod prepričani, da se vložek v usposabljanje splača.

Uspešnost vsake organizacije je v glavnem odvisna od smotrnega usklajevanja in razvijanja obstoječih virov; kadrovskih, finančnih, tržnih, tehnoloških in drugih, glede na postavljene cilje. Ti viri so različni in vsak po svoje prispeva k uspehu organizacije v skladu s potrebami, možnostmi in posebnostjo dane situacije. Kadrovske viri obsegajo

posebno področje dejavnosti, s katero želimo optimizirati človekove zmogljivosti, tako da bi izpolnili osebne in organizacijske cilje.

2 Zakonska določila in pravne podlage za usposabljanje na železnicah

Nacionalni predpisi. V skladu s potrebami delovnega procesa imajo delavci - zaposleni na železnicah, zaposleni na delovnih mestih povezanih z varnostjo in urejenostjo prometa (izvršilni železniški delavci; delavci - poklici, ki neposredno sodelujejo pri opravljanju železniškega prometa; vlakovni odpravnik – prometnik, strojevodja, premikač, vlakovodja ...), po internih določitih železniških predpisov, pravico in dolžnost do stalnega izobraževanja, izpopolnjevanja in usposabljanja ter so dolžni svoje znanje in usposobljenost nenehno dopolnjevati in poglobljati. Usposabljanja delavcev, ki neposredno sodelujejo v prometu, obsega: permanentno dopolnjevanje, širjenje in poglobljanje posameznih sestavin strokovnih znanj, seznanjanje s spremembami in dopolnitvami veljavnih predpisov ter z novimi predpisi, s tehničnimi dosežki, z delovno tehnologijo in drugimi novostmi ter s tvornim sodelovanjem pri zagotavljanju varnosti in urejenosti železniškega prometa.

Direktive Evropske unije. Slediti je potrebno tudi najnovejšim spoznanjem po usposabljanju zaposlenih za doseganje nivoja v okviru Evropske direktive o varnosti. Tako morajo železnice evropskih držav pri izvajanju usposabljanja zaposlenih za varno delo po direktivah Evropske unije upoštevati zakonodajo in predpise UIC (International Union of Railways), mednarodne konvencije, standarde in pravila, ki jih UIC (franc. Union International des Chemines de Fer, angl. International Union of Railways – mednarodna železniška unija) kot samostojni subjekt v mednarodni skupnosti izdaja za področje transporta in infrastrukture. Zaposleni pa se morajo dodatno strokovno in jezikovno usposobiti v skladu z zahtevami nacionalne in evropske zakonodaje, predvsem v skladu z Direktivo o varnosti na železnicah (2004/49), podsistemom Vodenje in upravljanje železniškega prometa Direktive 2001/16 ter Direktivo Evropskega parlamenta in Sveta o izdaji spričeval strojevodjem, ki upravljajo lokomotive in vlake na železniškem omrežju Skupnosti (2007/59).

Dostop do sredstev za usposabljanje. Države članice Skupnosti morajo zagotoviti, da imajo prevozniki v železniškem prometu, ki predložijo vlogo za varnostno spričevalo, enakopraven in nediskriminatoren dostop do sredstev za usposabljanje osebja (osebje, ki opravlja ključne varnostne naloge), ki izpolnjuje pogoje pridobitve varnostnega spričevala.

Strokovno usposabljanje. Izvršilni železniški delavci morajo biti strokovno usposobljeni za delo, ki ga opravljajo, ter izpolnjevati posebne zdravstvene in druge pogoje. Za dela, ki jih opravljajo v železniškem prometu, morajo imeti strokovni izpit in se morajo strokovno izpopolnjevati. Njihova strokovna usposobljenost se mora redno,

po potrebi pa tudi izredno, preverjati z izpiti ali na drug ustrezen način.

Delodajalec ne sme dovoliti opravljanja dela izvršilnemu železniškemu delavcu, ki pri preverjanju znanja ni pokazal zadovoljive strokovne usposobljenosti ali čigar strokovna usposobljenost za to delo ni bila preverjena.

Pridobitev strokovne izobrazbe. Zaradi zagotovitve varnosti in urejenosti železniškega prometa, ki ga opravlja železniško podjetje, in enotne rabe predpisanih pravil za urejanje in opravljanje železniškega prometa, se določajo po enotnih kriterijih, potrebna strokovna usposobljenost delavcev in način za njeno ugotavljanje in preverjanje, kakor tudi delovna mesta, na katerih bodo delavci neposredno sodelovali pri opravljanju železniškega prometa.

Delavci, ki neposredno sodelujejo pri opravljanju železniškega prometa, morajo biti posebno strokovno usposobljeni za dela, ki jih opravljajo.

3 Problematika pri usposabljanju

Dejstvo je, da spremembe v okolju močno vplivajo na sam obstoj, spreminjanje in poslovno delovanje podjetja. Različna gibanja, ki prihajajo od zunaj, silijo podjetja v krepitve sposobnosti prilagajanja okolju na vedno nov in izviren način ter na hitro reagiranje.

Organizacijska struktura predstavlja podjetje, vendar brez odvijanja procesov poslovanje ni možno. Ključni dejavnik, ki daje dinamiko procesom, je aktiven človek. Za njegovo aktivnost je pomembna tudi njegova ustrezna usposobljenost.

Železnice evropskih držav, večinoma kot največja in javna podjetja, se srečujejo z veliko problemi in težavami. Večina teh problemov je povezanih z ekonomskimi, organizacijskimi in tržnimi spremembami. Sodobne tehnologije spreminjajo vsebino dela in strukturo znanja zaposlenih, predvsem pa zahtevajo širšo in višjo raven strokovne izobrazbe delavcev.

Spremembe na trgu in tekmovanje zahtevajo izvirne rešitve, ki jih je skoraj nemogoče doseči z ustaljenim znanjem.

Organiziran lastni izobraževalni sistem železnic, ki je bil zgrajen v obdobju industrializma, sedaj ni več primeren. Skladno z dinamičnim in hitro razvijajočim okoljem, ki zahteva vedno večjo fleksibilnost, si je potrebno prizadevati za spodbujanje inventivnega in ustvarjalnega razmišljanja.

Vsak zaposleni bi moral dati svoj maksimum in se zavedati, da dela za sebe in celotno podjetje, prevzemati iniciativo za izboljšanje produktivnosti in odnosov, biti lojalen sodelavcem in ciljem podjetja ter prevzemati odgovornosti za rezultate podjetja. Na ta način je potrebno zgraditi podjetje, v katerem vsakdo sprejema in uporablja znanje in sposobnosti drugih ljudi ter se uči od drugega, ne da bi ga pri tem omejevala hierarhija ali kakšni drugi zadržki.

Ker je vsako znanje osebni ter hkrati družbeni kapital, se mora prisluhniti tudi željam in potrebam posameznikov za izobraževanje ter doseči optimum tako, da se bodo želje in potrebe posameznikov ujemale z željami in

potrebami podjetja. Prvi korak pa morajo narediti vodilni v podjetju seveda brez avtokratskega vedenja na železnicah in z več svobode in omogočanjem izvirnosti pri delu vsakemu delavcu.

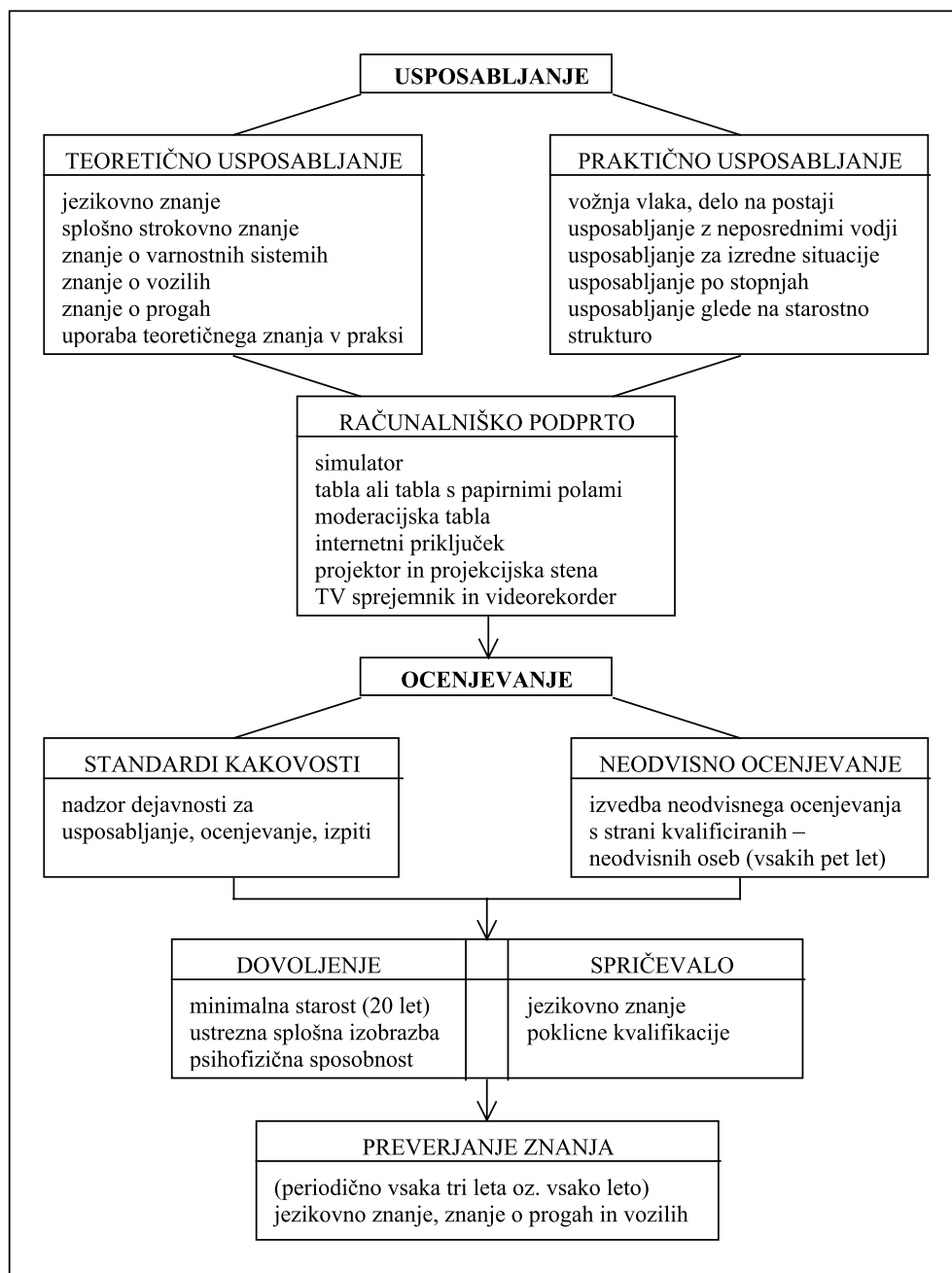
4 Model usposabljanja po direktivah EU na železnicah

Ob upoštevanju evropske zakonodaje, predvsem v skladu z Direktivo o varnosti na železnicah (2004/49), pod-sistemom Vodenje in upravljanje železniškega prometa Direktive 2001/16 ter Direktivo Evropskega parlamenta

in Sveta o izdaji spričeval strojevodjem, ki upravljajo lokomotive in vlake na železniškem omrežju Skupnosti (2007/59), je izdelan in na sliki 1 (Zemljič, 2007: 119) prikazan model usposabljanja po direktivah EU za izvršilne železniške delavce na železnicah evropskih držav.

Model usposabljanja (slika 1) tako združuje: metode usposabljanja in ocenjevanja, diagram poteka usposabljanja, načine usposabljanja, teoretičnega in praktičnega (tudi s simulatorji), postopke za izdajo potrdil, spričeval in dovoljenj, frekvence usposabljanja, veljavnost usposabljanja, izmenjavo informacij itd.

Metoda usposabljanja Potrebno je zagotoviti ustrezno ravnotežje med teoretičnim usposabljanjem (učilnica in predstavitve) in praktičnim usposabljanjem (na delov-



Slika 1: Model usposabljanja zaposlenih za izvršilne železniške delavce na železnicah evropskih držav po direktivah EU

nem mestu, vožnja z in brez nadzora na tirih, ki so v izobraževalne namene zaprti).

Za individualno učenje operativnih pravil, signalizacije itd. je potrebno omogočiti računalniško podprto usposabljanje.

Uporaba simulatorjev je lahko koristna za učinkovito usposabljanje strojevodij in prometnikov; simulatorji so posebej koristni pri usposabljanju za izredne delovne razmere ali za redko uporabljane predpise. Imajo posebno prednost, ker delavcem omogočajo, da se z vajo naučijo reagirati na situacije, za katere ni možno usposabljanje v praksi.

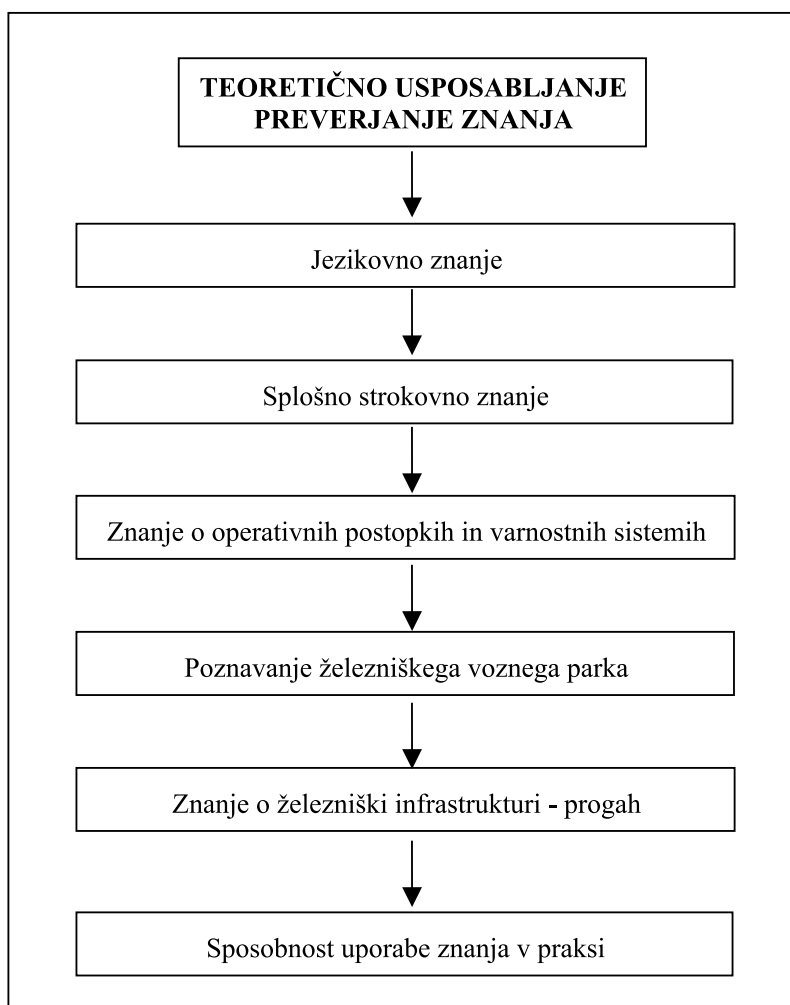
Pridobivanje znanja o poznavanju del mora potekati na ta način, da je obdelano določeno število opravil, in sicer podnevi in ponoči. Kot alternativno metodo je med drugim možno uporabiti tudi video posnetke.

Redna preverjanja. Za ohranitev veljavnosti dovoljenja mora imetnik opravljati periodične izpite in/ali teste. Pri obnovi dovoljenja pristojni organ s pomočjo registra preveri, ali delavec (prometnik, strojevodja, sprevednik ...) izpolnjuje zahteve za obnovitev.

Imetniki spričevala morajo za njihovo ohranitev opravljati periodične izpite in/ali teste. Frekvenco teh izpitov/testov določi prevoznik v železniškem prometu ali upravljavec železniške infrastrukture, pri katerem je delavec stalno ali pogodbeno zaposlen, v skladu z lastnim sistemom varnega upravljanja in upoštevanjem minimalne frekvence za Skupnost.

Za vsakega od navedenih preverjanj mora organ izdati narediti zaznamek v spričevalu in v registru, da je delavec izpolnil zahteve. V primeru izostanka na periodičnem preverjanju ali negativnega rezultata se uporabi postopek kot za obnovitev oz. ohranitev. Potek teoretičnega usposabljanja in preverjanja znanja je shematično prikazan na sliki 2.

Registri in izmenjava informacij. Za pregled stanja, nadzor in izmenjavo informacij se vodi register vseh dovoljenj, ki so bila odobrena, posodobljena, obnovljena, prenehala veljati, bila spremenjena, odložena, odvzeta ali prijavljena kot izgubljena, ukradena ali uničena. V registru morajo biti vsi podatki, ki so za vsako dovoljenje predpisani oz. so na dovoljenju. Do njih mora biti možen dostop preko nacionalne številke, dodeljene vsakemu



Slika 2: Diagram poteka teoretičnega usposabljanja in preverjanja znanja za pridobitev spričevala

delavcu. Proces za izdajo potrdila je prikazan na sliki 3 (Zemljič, 2007: 123).

Register se mora redno posodabljeni. O registru, o statusu dovoljenj oz. podatkih se mora na utemeljeno zahtevo posredovati informacije pristojnim organom drugih držav članic, Agenciji ali delodajalcu delavcev.

Vodenje registra mora zagotavljati vsak prevoznik v železniškem prometu in vsak upravljavec železniške infrastrukture ter pristojni organi.

Za zagotovitev interoperabilnosti registrov se morajo izdelati osnovni parametri registra in zagotavljati podatke za izmenjavo na osnovi pravice dostopa.

5 Preoblikovanje spremljajočih dejavnikov usposabljanja in uvajanje novosti za doseganje boljše usposobljenosti zaposlenih

Na podlagi dognanih ugotovitev o razlikah in odstopanjih posameznih načinov usposabljanja, izvedenih s preučevanjem sistemov usposabljanja na železnicah v evropskih državah, je poleg izdelanega modela za usposabljanje zaposlenih v skladu z direktivami Evropske skupnosti opredeljeno tudi preoblikovanje spremljajočih dejavnikov usposabljanja in uvedba novosti pri usposabljanju, ki imajo vpliv na kakovost usposabljanja.

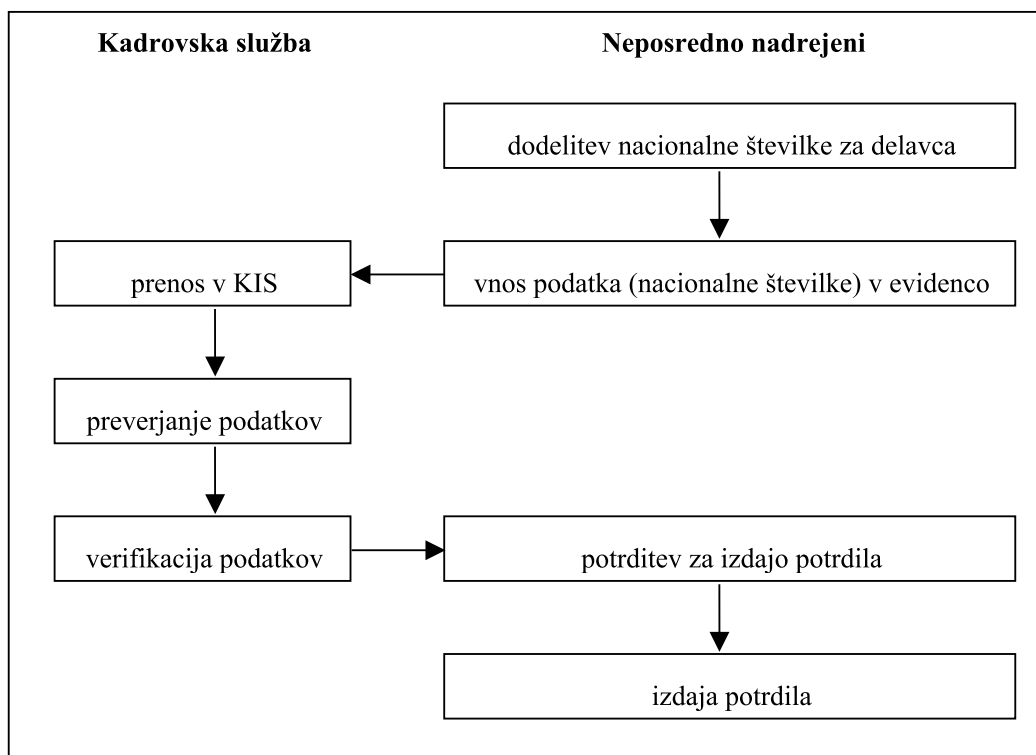
Preoblikovanje spremljajočih dejavnikov usposabljanja in uvedba novosti vključuje naslednje:

Elektronsko komuniciranje. Možnost elektronskega komuniciranja (E-komuniciranja) s centrom za usposabljanje in vodji usposabljanja izven delovnega časa približa uporabnikom informacije v zvezi z nejasnimi tehnološkimi in prepisnimi pogoji dela v izvršilnih službah. Za pridobivanje informacij lokalnega značaja se lahko vzpostavi obveza po informiranosti z neposrednimi vodji.

Na osnovi postavljenih vprašanj centru za usposabljanje, vodjem usposabljanja in neposrednim vodjem, je potrebno problematiko posredovati neposredno zahtevanemu in po oceni tudi širšemu spektru potencialnih uporabnikov po tej zadevi. V kolikor se pojavi večje število podobnih zadev oz. problematike lahko center za usposabljanje ali odgovorna strokovna služba izda navodila o jasnih postopkih oz. usmeritvah in ukazih za izvedbo izrednega poučevanja.

Elektronsko poučevanje. Razširitev E-komuniciranja se lahko razširi v elektronsko redno poučevanje; E-poučevanje (npr. 18 ur od 36 ur letno). Postopek E-poučevanja mora zahtevati pozitivno opravljen test, ki ga delavec opravlja. Z vnosom svoje personalne številke se delavec identificira, nato odgovarja na logična vprašanja po predhodnem pregledu vsebine na to temo, ali simulacijsko izvaja postopke, vezane na njegov poklic (strojevodja, prometnik – vlakovni odpravnik).

Usposabljanje z neposrednimi vodji. Za del usposabljanja je potrebno vključiti tudi neposredne vodje, neposredno nadrejene iz lokalnega delovnega procesa, ki se soočajo s to problematiko in so za odpravo le te tudi odgovorni.



Slika 3: Proces za izdajo potrdila (dovoljenja – spričevala)

Letni razgovori v podjetju. Uvedba letnih pogovorov v podjetju, lahko tudi skupaj s krožki kakovosti ali kot delovni sestanki s poudarkom na izražanju mnenj, predlogov in pripomb.

Lokacija usposabljanja. Splošno usposabljanje v enem, centralnem centru, kjer se izvede usposabljanje za več poklicev hkrati, katerih dela in naloge se povezujejo, medtem ko je potrebno za praktična dela izvajati usposabljanja – poučevanja tudi na delovnem mestu.

Obseg usposabljanja – za izredne situacije. Usposabljanje mora vsebovati tudi vsebine za dela, ki se opravljajo le v manjšem obsegu oz. za izredne situacije, to pa bi moralo po potrebi vsebovati tudi psihološko tematiko reagiranja in obvladovanja različnih stresnih situacij. Kajti dela, ki se opravljajo v manjšem obsegu in ob izrednih situacijah, je potrebno prav tako opraviti vestno, varno in zanesljivo, analize in izkušnje pa kažejo, da se za takšna dela opuščajo določeni pravilni postopki oz. se ne izvajajo popolno. Za stresne situacije (izredni dogodki, povoženja, samomori ...) bi bilo potrebno zaposlene psihološko pripravljati in jim nuditi pomoč v času izrednosti in po njej,

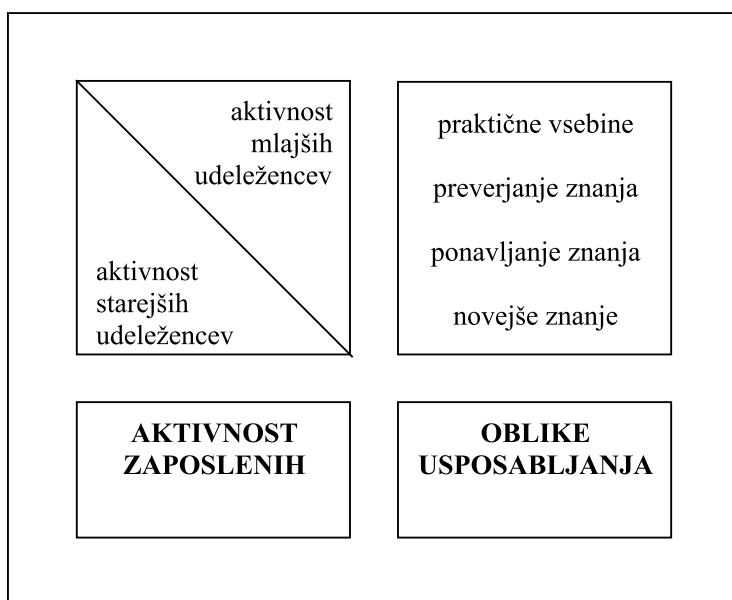
saj lahko takšna stanja trajajo pri zaposlenih kar nekaj časa.

Oblike usposabljanja. Glede na način dela na železnici za odvijanje varnega in rednega prometa vlakov med minimalno dvema osebama (komunikacija: prometnik/vlakovni odpravnik – kretnik, prometnik/vlakovni odpravnik – strojevodja, dispečer – strojevodja ...) je smiselno aktivno usposabljanje v obliki seminarjev, delavnic, vaj v skupini z minimalno dvema vključenima osebama.

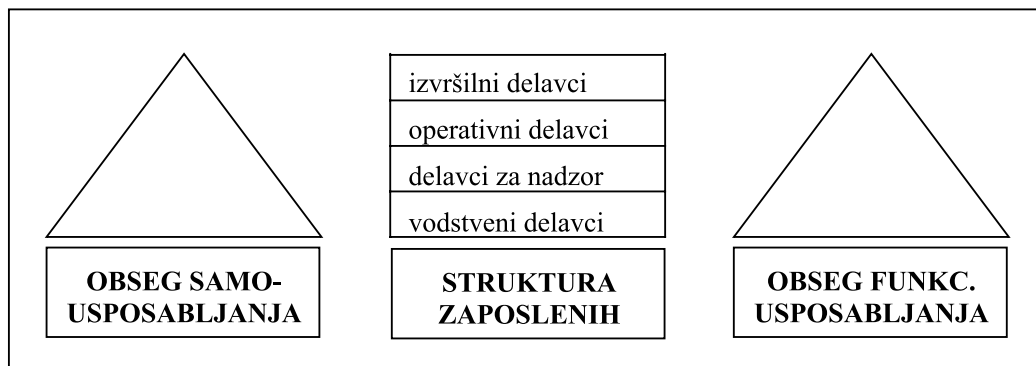
Usposabljanje glede na starostno strukturo. Mlajše udeležence je potrebno usposabljeti s poudarkom na praktičnih vsebinah, medtem ko starejše udeležence z več novejšega znanja, novo tehniko, novimi pristopi ...

Aktivnost (večja ali manjša) strukture zaposlenih je prikazana na sliki 4.

Usposabljanje po stopnjah. Za višje stopnje – nivoje delavcev (operativnih delavcev, delavcev za nadzor in vodenje ...) je potrebno usposabljanje izvajati v obliki samousposabljanja, kar prikazuje tudi slika 5. Za opravljanje teh del pa so potrebna tudi dodatna funkcionalna



Slika 4: Aktivnost udeležencev usposabljanja (mlajših in starejših) pri različnih oblikah usposabljanja



Slika 5: Aktivnost samo usposabljanja in obsega potreb po funkcionalnih znanjih glede na strukturo delavcev

znanja, didaktične, organizacijske in komunikacijske sposobnosti.

Uporaba simulatorjev in sodobnih učnih pripomočkov za usposabljanje. Glede na trend tehnike je potrebno pri samem nakupu (lokomotiv, varnostnih naprav za vodenje prometa) nakupiti tudi kompatibilne simulatorje za usposabljanje. Usposabljanje s simulatorji omogoča kvalitetno in kakovostno usposabljanje in poteka tudi brez vplivov na varnost železniškega prometa, predvideti je možno vse možnosti prikazov, izjemnih situacij, povečanega obsega dela ... Po poteku usposabljanja s simulatorji je potrebno sicer tudi usposabljanje na delovnem mestu, vendar v manjšem obsegu.

Usposabljanje nazalogo. Postopki dinamičnega odvijanja procesov dela prometnega sistema (povečani blagovni tokovi, izredne odsotnosti delavcev ...) zahtevajo različno potrebo po delovnih resursih. V ta namen je potrebno delavce usposablјati na zalogo zunaj njihovega delovnega časa. Po zaključku usposabljanja jim je potrebno zagotoviti sredstva in možnost usposabljanja ter možnost občasnega aktivnega dela v poklicu, za katerega so se usposobili, zaradi ohranitve licence opravljanja dela.

Uvedba pametnih kartic (slika 6). Pametna kartica po zahtevah Direktiv EU, ki združuje dovoljenje in spričevala, ima lahko črtno kodo zraven obveznih podatkov (ime in priimek, delovno mesto, rojstvo ...) z možnostjo hranjenja in obdelave podatkov za:

- nastop službe, preverjanje zadostnega počitka, seštevek opravljenih ur doslej (v tekočem tednu in mesecu) oz. primanjkljaj do konca obdobja (tedna in meseca), zaradi opozarjanja na možnost zakonske prekoračitve opravljanja nadurnega dela (tedensko 8 ur, mesečno 20 ur),
- preverjanje izpita in rednega usposabljanja, opozorilo cca. 2 meseca pred potekom,
- evidenca delovnega časa, seštevek, prenos v bazo podatkov za obračun ur, obračun dopusta, obračun prevoza na delo, obračuna dodatkov (nočne, nedeljske ... ure, terenski dodatek ...).

Neformalni dokument za vpisovanje - evidentiranje referenc. Za vsakega zaposlenega sicer obstaja personalna mapa, vendar ne vsebuje vsega, kar bi lahko oz. vsebine niso poenotene. Možnost vpisovanja oz. prilaganja dokumentov z referencami, objave internih člankov, sodelovanja v delovno – raziskovalnih skupinah ... ni omogočeno niti ni predvideno.

Uvedba takšnega dokumenta, ki naj bo javnega značaja, daje možnost sprotne in širšega spremljanja razvoja kadrov – zaposlenih, kar je eden od ključnih kriterijev za ovrednotenje primernosti zaposlenih.

Spletni BLOG za pripombe in mnenja. Vzpostavitev BLOG-a na interni spletni strani daje možnost posredovanja pripomb anonimnega značaja. S strani delodajalca oz. centra za usposabljanje je potreben skrbnik za to spletno stran.

Preverjanje znanja. Pridobljeno znanje je potrebno preverjati tudi periodično in glede na pojav potrebe po preverjanju (novi predpisi, nova tehnika, daljša odsotnost, druga dela, bolj zahtevna dela, sum nepoznavanja predpisov ...).

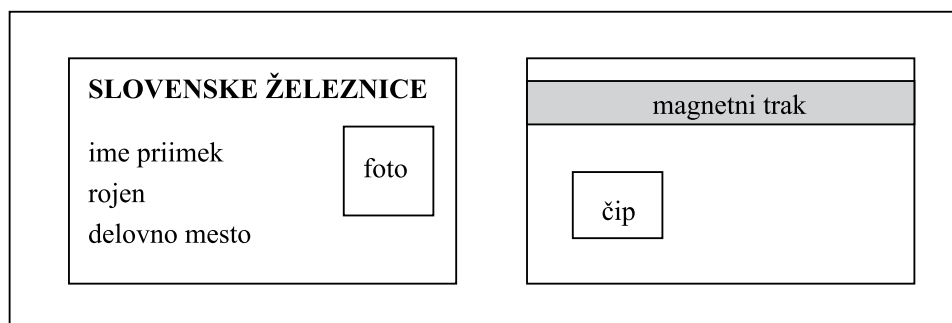
Prav tako je potrebno preverjati znanje (Slika 7) delavcev pri napredovanjih iz izvršilnih in operativnih delavcev v delavce za nadzor in vodenje, in sicer v enoletnem periodičnem obdobju, povezano s podaljšanjem pogodbe o zaposlitvi za določeno delovno mesto. Preverjanje znanja za vodstvene delavce in delavce za nadzor je potrebno izvesti v dveh delih:

1. splošno preverjanje z zunanjimi, neodvisnimi izvajalci; za dodatna funkcionalna znanja, didaktične, organizacijske in komunikacijske sposobnosti,
2. strokovno preverjanje po nivojih (šef postaje, nadzornik proge, tehnolog, šef sekcije ...).

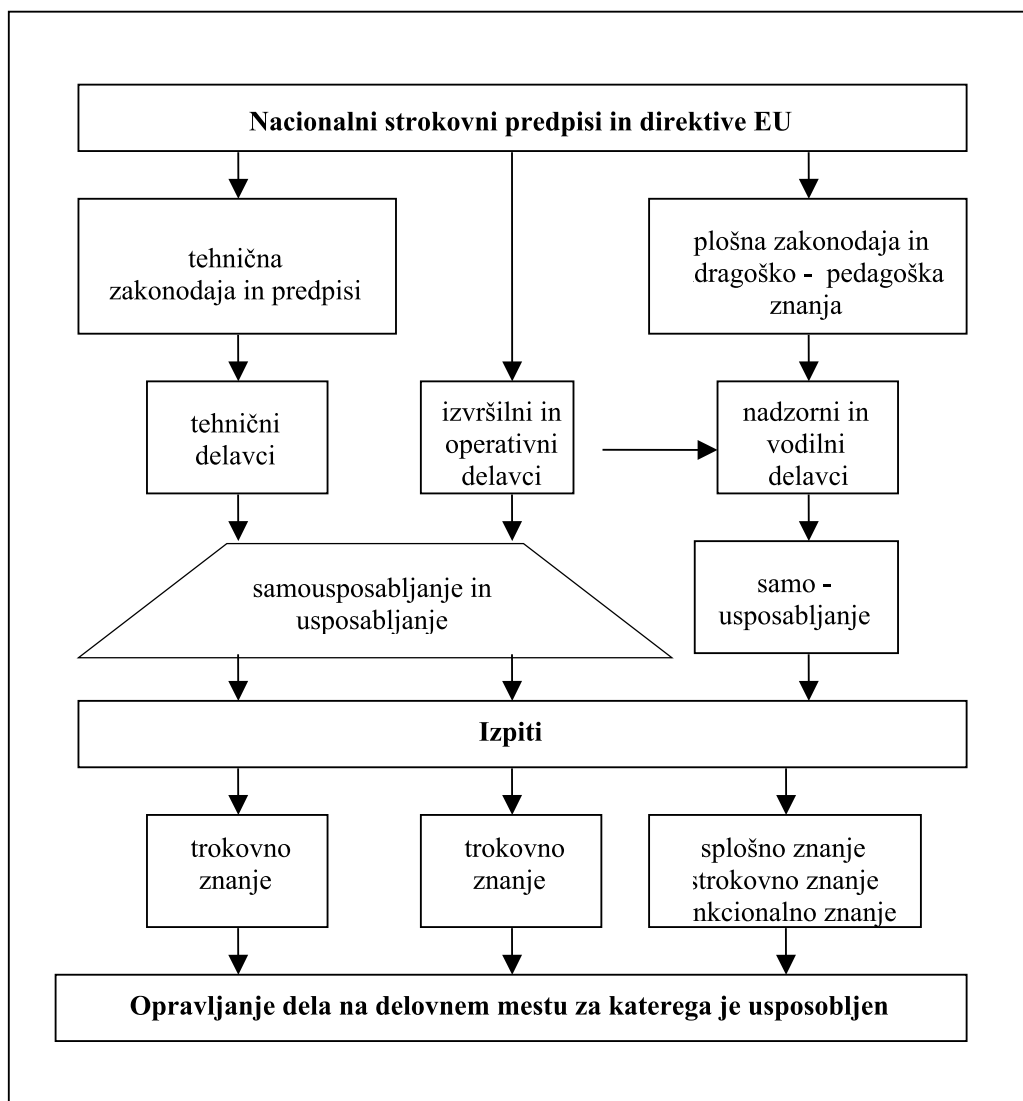
To pomeni usposabljanje in preverjanje znanja po stopnjah delovnih mest oz. za vse ravni podjetja, ki vključuje že prej navedena dva dela izpita (splošni, strokovni in dodatni izpiti za funkcionalna znanja, didaktične, organizacijske in komunikacijske sposobnosti ...).

Medtem ko je za usposabljanje in preverjanje znanja tehnično inženirskih delavcev na specialnih področjih potrebno samo strokovno preverjanje in obstaja možnost zaposlitve s prostega trga delovne sile, je za razliko pri izvršilnih, operativnih in nadzorno vodilnih delavcih nujen pogoj, da morajo napredovati iz izvršilnih delovnih mest.

Način zaposlovanja. Pri zaposlovanju novih kadrov na železnicah se je potrebno delno usmeriti k iskanju strokovnjakov s področja prometa, prava, ekonomije, logistike, gradbeništva itd., in to z višjimi izobrazbami kot se zahteva za izvršilna delovna mesta. Šele po preteku nekaj let, ko se dodobra usposobijo in spoznajo železnico kot celovit sistem, tudi z rotiranjem na delovnih mestih, jih je praviloma primerno prerazporejati (slika 7) na bolj zahtevna delovna mesta (nadzorna in vodilna delovna



Slika 6: Predlog pametne kartice zaposlenih na železnici – naslovna in hrbtna stran



Slika 7: Model usposabljanja zaposlenih na železnicah evropskih držav za doseganje boljše usposobljenosti zaposlenih zaradi interesa lastnika

mesta). Pri določanju kriterijev pa se ne sme izogniti kriterijem, kot so osebnostne lastnosti in sposobnosti ter poznavanje tujega jezika in računalništva.

Večopravilnost. Doseganje boljših rezultatov v podjetju je mogoče doseči tudi z združevanjem del in nalog. Poleg tega pa je pomembno tudi nadomeščanje (delovna mesta navzgor in navzdol) glede na pomembnost procesov dela tako, da kvaliteta in kvantiteta ne upada. Za izvršilne in operativne delavce bi moral vsak neposredno nadrejeni imeti pogoje (zdravstvena sposobnost in strokovna usposobljenost – izpit) za delo podrejenih delovnih mest, predvsem v primeru izrednih odsotnosti.

Način raziskovalnega sodelovanja. Železnice so eno od specifičnih podjetij, ki samo po sebi privablja mlade in starejše strokovnjake zgolj kot ljubitelje, ki so iz svojih nagnjenj do železnice pripravljani veliko narediti, zato jih je treba v polni meri angažirati. Prav tako to velja za študente višjih šol, fakultet in univerz, kakor tudi za

znanstvene institucije, ki jih bi bilo potrebno vključevati v raziskovanja.

6 Zaključek

Glede na poznavanje obstoječega načina organiziranosti usposabljanja, analiziranje sistemov usposabljanja delavcev na železnicah evropskih držav ter predlaganega modela usposabljanja se pojavljajo različna vprašanja. Med njimi izstopajo predvsem vprašanja o slabostih in nevarnostih, ki bi jih model kratkoročno kot tudi dolgoročno prinesel, medtem ko o prednostih in priložnostih ni kaj dosti zaznati.

Prednosti in novosti, ki jih prinaša model usposabljanja, so naslednje:

- izboljšanje usposobljenosti zaposlenih,
- pospeši se pridobivanje znanj,

- vzpostavlja se neposreden stik z udeleženci usposabljanja (letni pogovori v podjetju, usposabljanje z neposrednimi vodji ...),
 - pridobivanje potrebnih znanj (glede na starostno strukturo),
 - ohranitev konkurenčnosti.
- Dodatnega pomena pa je:
- usposabljanje na zalogo,
 - uvedba pametne kartice z dodanimi elementi,
 - »pravi ljudje na pravem mestu«, kar dosežemo z usposabljanjem in preverjanjem znanja na vseh ravneh podjetja.

Čeprav vzpostavitev usposabljanja v skladu z direktivami in stalno prilagajanje predstavljata tudi veliko finančno breme, se lahko to slabost razume kot priložnost za:

- zagotavljanje usposobljenosti zaposlenih po interesih lastnika – podjetja,
- zagotavljanje zaposlitve lastnim delavcem pred zaposlitvijo tujcev,
- možnost strokovnega usposabljanja lastnih zaposlenih za nastopanje na trgu prometnih storitev širšega evropskega prostora.

Napredovanje z majhnimi koraki in nastopanje v širšem evropskem prostoru omogoča uveljavljanje nacionalne intelektualne lastnine in konkurenčnost pred drugimi železnicami.

Zakonske omejitve oz. nadzor le-teh (psihofizična sposobnost, poklicne kvalifikacije, izpiti, neodvisno ocenjevanje ...) prav tako predstavljajo ovire, vendar se le tako se lahko pridobi kader širših lastnosti in sposobnosti ter strokovnih pogledov. S takšnim kadrom je možno lažje vzpostaviti tehnološki red in s tem večje pozitivne učinke. Tehnološki red je v smislu organizacijskih struktur opravljanje del in nalog brez dajanja posebnih navodil, napotkov, usmeritev ali celo ukazov, temveč le prevzemanje in opravljanje predpisanih nalog. Korak k še večjemu napredku pa je seveda samoiniciativno prevzemanje dodatnih nalog.

Zaposleni v podjetju se bodo sami usposabljali tudi, če usposabljanje v podjetju ne bo obvezno. Potrebno jih je le ustrezno motivirati, kar je vsekakor nujno, seveda skladno z vizijo ter cilji podjetja, s katerimi morajo biti delavci seznanjeni in se z njimi poistovetiti.

Motivacija mora potekati od najvišjega menedžerja navzdol, posamezni vodje pa motivacijske prijeme potem izvajajo v praksi na nižjih ravneh. Načine motivacije je treba v podjetju definirati in jih tudi enotno uporabljati. Na znanje pa je potrebno gledati kot na investicijo za prihodnost. Žal pa se v podjetjih največkrat naleti na ovire glede previsokih stroškov usposabljanja.

Čeprav je potrebno usposabljanje prilagajati tehnološkemu razvoju, je prav tako včasih potrebno tehnološki razvoj naravnati na trenutno vzpostavljen sistem, kar posebej velja za železnice, ki predstavljajo prometni sistem z osnovno nalogo - izvajanje varnega prevoza potnikov in blaga.

Finančna sredstva predvidena za posodobitev železniške infrastrukture ne bodo reševala železnic, očitno

pa je, da lahko zaposleni na železnicah prav s svojim znanjem, sposobnostmi in ustvarjalnostjo prinesejo prednost pred drugimi konkurenti.

Vprašanje časa je, kdaj bodo vse države evropskih železnic spoznale, da je model usposabljanja, preoblikovanje spremljajočih dejavnikov in uvedba novostih pri usposabljanju dejstvo in bodo le – to vgradile v svoje sisteme usposabljanja.

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Franc Zemljič je od leta 1990 zaposlen na slovenskih železnicah. Septembra leta 1999 je ob delu diplomiral na Univerzi na Primorskem, Fakulteti za pomorstvo in promet v Portorožu. Podiplomski študij na Univerzi v Mariboru, Fakulteti za organizacijske vede, smer splošni kadrovski management je končal novembra 2007. Prihodnost vidi v prestrukturiranju in racionalizaciji delovnih mest glede na tehnološki napredek, s tem da je potrebno prestrukturiranje podjetja Slovenske železnice d.o.o. izvajati usklajeno predvsem s kadrovskimi možnostmi, kakor tudi trženje izobraževalne dejavnosti na Slovenskih železnicah zunanjim uporabnikom.

Eva Jereb je izredna profesorica za izobraževalno-kadrovsko in informacijsko področje na Fakulteti za organizacijske vede, Univerze v Mariboru. Njeni sedanji raziskovalni interesi so predvsem na področju kadrovskih ekspertnih sistemov, izobraževanja na daljavo, avtomatizacije pisarniškega poslovanja, delno pa tudi na področju dela na daljavo. Svoje delo je predstavila na več mednarodnih in domačih strokovnih in raziskovalnih konferencah ter posvetovanjih. Je avtorica ali soavtorica znanstvenih in strokovnih člankov, objavljenih v domačih in tujih revijah, ter učbenikov.

Razmišljanja

Andrej A. Česen

PMP, Mlakarjeva 59, 1236 Trzin,
pmp@siol.net

“Projektni management” ali “projektno vodenje”

Polemika ob prevajanju strokovnega standarda

“Vodnik po znanju projektnega vodenja - PMBOK® vodnik”

Uvod

Pred časom se je skupina prostovoljcev, članov združenja (društva) PMI Slovenija Ljubljana Chapter, odločila, da - ob podpori vodstva združenja - prevede standard „A guide to the project management body of knowledge - PMBOK® guide”, ki je *de iure* ameriški (ANSI) in *de facto* svetovni (globalni) standard s področja projektnega managementa.

PMI Slovenija Ljubljana Chapter (glej: www.pmi-slo.org) je slovenska podružnica ameriškega združenja Project Management Institute (kratica PMI®, glej: www.pmi.org), ki je največje svetovno združenje posameznikov s področja stroke projektnega managementa in izdajatelj omenjenega standarda.

Po podatkih mesečnika PMI Today (november 2007, str. 4) je število članov združenja po podatkih za september 2007 skoraj 250.000. Po istem viru je v obtoku nad 2,3 milijone izvodov omenjenega stan-

darda vseh treh izdaj (1996, 2000, tretja izdaja 2004, vključno z uradnimi prevodi), kar je za strokovno literaturo izjemna številka. Torej zelo tehten razlog za odločitev o prevajanju.

Po obsežnem in po naši oceni uspešnem delu je team prostovoljcev Chapterja, v katerem je sodeloval tudi avtor pričujočega zapisa, uskladal glosarij (razlagalni slovar) izdaje 2000, ki je bil ob začetku prevajalskih naporov že na voljo. Usklajeni glosarij naj bi bil eden od temeljev za nadaljnje prevajanje tretje izdaje iz leta 2004, ki je bila v času sklepnega usklajevanja glosarija kot osnutek že v kroženju.

Po avtorjevem dojemanju okoliščin je team zavestno pustil odprte oz. neusklajene pojme **projektni team (tim)** ali **skupina, projektni management** ali **projektno vodenje** in **projektni manager** ali **projektni vodja**.

Kot prevajalec tretje izdaje in kot podpisnik posebne izjave v licenčni pogodbi o prevajanju s PMI® se je avtor tega prispevka med prevajanjem *po svoji vesti in strokovnem prepričanju* opredelil za pojme „projektni team”, „projektni manager” in „projektni management” iz razlogov, podanih v nadaljevanju.

Med usklajevanjem dokončnega prevoda tretje izdaje se je v prevajalskem teamu prostovoljcev Chapterja vnela intenzivna diskusija in polemika o primernosti navedenih pojmov. Kljub drugačnemu in z argumenti podprtemu mnenju oz. stališču avtorja se je večina odločila za uporabo pojma „projektno vodenje”. V korist stroke se je avtor s tem strinjal, vendar se je zaradi ohranitve osebne integritete in strokovne poštenosti odločil za objavo tim. „ločenega mnenja”. Zato je namen pričujočega teksta širši strokovni javnosti predstaviti argumente prevajalca tretje izdaje standarda, ki so botrovali odločitvi o izbiri omenjenih pojmov. Upravičeno tudi pričakujemo in si želimo, da bi se strokovnjaki s področja projektnega managementa odzvali s konstruktivnimi mnenji in tudi drugačnimi pogledi na obravnavano izraze.

Ker gre za prevajanje standarda, smo morali spoštovati njegovo vsebi-

no in kontekst, v katerega standard sodi. To pomeni tudi spoštovanje definicij, podanih v glosariju. Prispevek zato izključuje možnost polemike oz. diskusije o vsebinskih vprašanjih glede omenjenih pojmov.

Avtor zato, da bi se izognili morebitnim nesporazumom, na začetku navaja definicije za obravnavane pojme po slovenskem prevodu („Vodnik po znanju projektnega vodenja - PMBOK® vodnik”), nato poišče razloge za svojo odločitev v uglednih virih, dodaja še primere iz prakse in na koncu poda predloge za nadaljnjo uporabo obravnavanih pojmov.

1. Definicije

Definicije so povzete iz slovenskega prevoda standarda pred dokončnim usklajevanjem.

Projektni team (angl. project team): vsi člani projektnega teama, vključno vodstveni team projekta, projektni manager in za nekatere projekte sponzor projekta.

V definiciji je treba zaradi razumevanja vsebine nujno pojasniti pojme v kurzivi.

Člani projektnega teama (angl. project team members): osebe, ki neposredno ali posredno poročajo projektne managerju in ki so odgovorne za izvajanje projektne dela kot dela sicer rednih prevzetih obveznosti.

Vodstveni team projekta (angl. project management team): člani projektnega teama, ki so neposredno vključeni v aktivnosti projektnega managementa; pri manjših projektih so v vodstveni team projekta lahko vključeni praktično skoraj vsi člani projektnega teama.

Sponzor projekta (angl. project sponsor): oseba ali skupina, ki za projekt zagotavlja finančne vire v obliki denarja ali v stvarni obliki.

Projektni manager (angl. project manager): oseba, ki ji izvajalska organizacija naloži (jo zaveže, ji dodeli), da doseže cilje projekta.

Projektni management (angl. project management): uporaba znanja, veščin (spretnosti), tehnik in orodij v aktivnostih projekta za izpolnitev njegovih zahtev.

Projekt (angl. project): začasno prizadevanje za uresničitev edinstvenega izdelka, storitve ali rezultata.

2. Team ali skupina

V knjigi Management Stane Možina na strani 601 piše takole.

Skupina: dva ali več posameznikov, ki se srečujejo zaradi pomembnih zadev.

Team: skupina, za katero je značilno, da sodeluje pri odločanju in v medsebojni pomoči pri opredeljevanju in doseganju ciljev. In še: "Iz tega sledi, da so vsi teami skupine, toda, glede na prej povedano, vse skupine niso teami." Tudi sicer je celotno 16. poglavje z naslovom "Skupine, teami" izjemno poučno.

Ob vsakodnevnem delu in kontaktiranju smo imeli priliko raziskovati stališča tudi drugih strokovnjakov (npr. Janez Mayer, Bojan Erjavšek), ki so bili enotni, da obstaja vsebinska razlika med obema pojmom.

Poglejmo še izvorni pomen besed "team" in "group" (za skupino) v angleškem jeziku (Hornby).

Na strani 1333 pod številko 2 je navedeno za **team**: a group of people who work together at a particular job: *the design/sales team; a team leader/member*.

Na strani 568 pod številko 1 je navedeno za **group**: a number of people or things that are together in the same place or that are connected in some way: *a group of girls/trees/houses*.

Lidija Šega na strani 832 piše za **team ORG**. skupina, ekipa, tim, team in za **project team** projektna skupina, projektni team.

Kot rariteto navajamo Slovenski etimološki slovar, kjer Marko Snoj na strani 667 pravi za pojem **tim**: 'delovna skupina', *timski*, pisano tudi *team, teamski*. Tujka, prevzeta iz agl. *team*, kar se je razvilo iz ags. *team*, 'skupina živali v eni vpregi'.

V SSKJ (Slovar slovenskega knjižnega jezika) je na strani 1239 **skupina** pod številko 1 *več ljudi, stvari, ki so v določenem času skupaj*; pod številko 2 pa: *več ljudi, ki jih kaj povezuje, družji*. Pri pojmu **team** (str. 1380) ta slovar usmerja na pojem **tim** (str. 1397): primerjaj **team**, nato

pa pod številko 1: *skupina ljudi, ki opravlja skupno delo, delovna skupina*: izbrati tim za določeno nalogo; uspešen, velik team.

V SP (Slovenski pravopis), ki je nekakšen "zakonik" slovenskega jezika, je na strani 1552 dovoljena beseda **team**, vendar nas usmerja na pojem **tim** na strani 1566: skupina strokovnjakov, delovna skupina; košarkarski tim - *moštvo*.

3. Management ali vodenje

V že citirani knjigi Management na str. 16 najdemo naslednjo definicijo. "**Management** je planiranje, organiziranje, vodenje in kontroliranje dela v organizaciji in s tem v zvezi vseh nalog in aktivnosti, ki jih zaposleni opravljajo."

V nadaljevanju je omenjan tudi pojem **manager** takole: "Pojem **manager** se nanaša na razne vrste managerjev in njihovih opravil. Managerji so lahko vodje oddelkov, služb, projektov, mojstri, nadalje predelavci, nadzorniki, direktorji, ravnatelji, upravitelji, predsedniki ... tako v organizacijah, ki ustvarjajo dobiček, kot v tistih, ki so financirane iz proračuna."

Na str. 17 pa še: "Nadalje nekateri opredeljujejo management kot poslovođenje, upravljanje ali ravnanje. Menimo, da se lahko uporabljajo ti izrazi sinonimno, toda, da ne bi bilo nesporazumov, raje uporabljamo tuji izraz management. V skladu s tem uporabljajo nekateri adekvatne izraze za managerje: poslovodnik, upravitelj, voditelj, ravnalec in podobno. Vsekakor pa je treba omeniti razliko med pojmom 'management' in 'leadership'... Vodenje kot management (op. pis.: v kontekstu definicije, glej zgoraj) obstaja za zagotavljanje ciljev organizacije, medtem ko se vodenje kot leading pojavi, ko kdo želi vplivati na vedenje posameznika ali skupine v organizaciji."

Na strani 20 pod naslovom "Naloge managerjev" je pojasnjeno tudi vodenje: "**Vodenje** je vplivanje, motiviranje in usmerjanje zaposlenih, da bi ustrezno opravljali svoje naloge."

V poglavju 14 "Dinamika vodenja" str. 524 je vodenju posvečeno

več pozornosti. Na str. 525 v robnih opombah je definicija: "**Vodenje** je sposobnost vplivanja, spodbujanja in usmerjanja drugih za doseganje želenih ciljev."

In še: "Vodenje se razlikuje od managementa. Ta je osredinjen na usklajevanje v organizaciji in vključuje planiranje, organiziranje, kadrovanje, kontroliranje v skladu z opredeljenimi organizacijskimi cilji. Vodenje pa je sposobnost vplivati, spodbujati in usmerjati sodelavce k želenim ciljem." (Vir citata na koncu poglavja: Kotter J. P.: *What Leaders Really Do*, Harvard Business Review, May-June, 1990; 103-111).

V že citiranem Slovenskem etimološkem slovarju je na str. 334 opisana beseda **menedžer**, *menedžerski*, *menedžment*, pisano tudi *manager*, *managerski*, *management*. Prevzeto iz agl. *manager* 'direktor, upravitelj', kar je izpeljano iz agl. *manage* 'upravljati, voditi', to pa je izposojeno iz frc. *ménager* v pomenu 'voditi (domače) gospodarstvo, voditi, vladati, ravnati'. Slednje je izpeljano iz frc. *ménage* 'gospodinjstvo, domače gospodarstvo', kar se je razvilo iz galorom. **mansionaticum*, izpeljanke na osnovi klas. lat. *mansio* 'prenočišče' > frc. *maison* 'hiša'.

Poglejmo, kaj pravi Hornby o obravnavanih pojmihi. Na str. 778 ima beseda **manage** več pomenov. Od skupaj 7 se nam zdi zanimiv šesti, ko gre za pojem **manage BUSINESS/TEAM**: to control or be in charge of a business, a team, an organization, etc: *to manage a factory / bank / hotel / soccer team; to manage a department / project*.

Podobno je za besedo **manager** več pomenov. Od treh je zanimiv prvi: a person who is in charge of running a business, a shop / store or a similar organization or part of one: *a bank / hotel manager; the sales / marketing / personnel manager; a meeting of area managers*.

Pri pojmu **management** so po oceni avtorja interesantni vsi trije pomeni.

1: the act of running and controlling a business or similar organization: *a career in management; hotel / project management; a management training course*.

2: the people who run and control a business or similar organization: *The management is / are considering closing the factory. The shop is now under new management. junior / middle / senior management; a management decision / job.*

3: the act or skill of dealing with people or situations in a successful way: *classroom management; time management; management of staff.*

Poglejmo si na str. 729 še pojma **leader** in **leadership**. Za prvi pojem so 4 možne razlage, od katerih se zdi smiselna prva.

Leader (1): a person who leads a group of people, especially the head of the country, an organization, etc: *a political / spiritual leader; the leader of the Conservative party; union leaders; He was not a natural leader. She is a born leader.*

Za pojem **leadership** so tri razlage.

1: the state or position of being a leader: *a leadership contest; The party thrived under his leadership.*

2: the ability to be a leader or the qualities a good leader should have: *leadership qualities / skills; Strong leadership is needed to captain the team.*

3: a group of leaders of a particular organization, etc: *The party leadership is / are divided.*

Poglejmo, kaj pravi Lidija Šega (že citirana) o pojmih **manage**, **manager**, **management**, **leader** in **leadership**.

Na str. 446 je **manage**: UPR upravljanje, voditi, urejati in na isti strani še **management** z dvema razlagama.

1 UPR, ORG poslovodenje, upravljanje, vodenje, poslovodno odločanje, menedžment, menedžerstvo.

2 vodni organ, vodstvo, uprava, vodilni / vodstveni kadri, vodilni uslužbenci / delavci; management, menedžment.

Na str. 448 ima beseda **manager** tri interpretacije.

1 UPR, DEL poslovodja, upravnik, direktor.

2 organizator poslovanja, poslovni vodja, manager, menedžer.

3 vodja / direktor podružnice / poslovalnice.

Na str. 412 je za nas ustrezna razlaga besede **lead (I/2)**: UPR, ORG vodstvo, vodenje, vodilna vloga kot samostalnik in kot glagol **(II/2)**: UPR, ORG voditi, biti v vodstvu.

Na str. 413 je **leader (1)** vodja, vodilni in na isti strani še **leadership (1)**: UPR, ORG vodstvo, vodenje in **(2)** sposobnost vodenja, voditeljska sposobnost.

V SSKJ (že citiran) je na str. 480 pojem **leader** tudi lider (na str. 493 nas usmerja na leader) publ. *voditelj, zlasti politični*: leaderji afriških držav / leader delovne skupine.

Na str. 520 sta pojma **management** in **manager** pojasnjena takole:

management v kapitalistični ekonomiki *vodenje podjetja*: visoko razvit management; *vodilni uslužbenci*: vrhovni management;

manager in menedžer (na str. 540 usmerja na manager) **1.** v kapitalistični ekonomiki *vodilni uslužbenec podjetja; direktor, ravnatelj*: družbo upravljajo managerji; odločilna vloga managerjev **2.** publ. *voditelj, organizator zlasti v gospodarstvu*: biti manager turistične agencije; dober, nesposoben manager / turistični manager.

Slovenski pravopis (SP) se do obravnavanih pojmov opredeljuje tako, da opušča izvorno obliko zapisa v angleščini in dovoljuje le fonetično obliko, npr.: **lider** (namesto leader; še liderski), **menedžer** (namesto manager) in **menedžment** (namesto management).

Na str. 621 tako najdemo pojem **lider** publ. *voditelj, vodja; liderka* publ. *voditeljica, vodja; liderski* publ. liderske sposobnosti *voditeljske*.

Na str. 859 je pojem **menedžer** opisan takole: menedžer v podjetju *direktor, poslovodni upravljavec*; menedžer poslovalnice *vodja*; menedžer boksarja, pevke / poslovni zastopnik/; **menedžerka** in **menedžerjev**.

Na isti strani je tudi pojem **menedžment** poj. visoko razvit menedžment (*vodenje, upravljanje*); skup. vrhovni menedžment *vodstvo, vodilni uslužbenci*.

Upošteva je domnevo, da se sestavljenci slovenskega pravopisa niso poglobljali v strokovni (vsebinski) vidik izrazov (za kar najbrž niso bili poklicani), se zdi, da je iz navedenega za vsakdanjo prakso pomembno in zavezujoče, da uporabljamo obravnavane pojme v fonetičnem zapisu. Izvirnih izrazov v angleščini slovenski pravopis kratkoma ne dovoljuje. Kljub zelo intimnemu prepričanju o nesprejemljivosti pravila "piši kao što govoriš" (po Vuku Karadži u) v slovenskem jeziku in ne glede na nekatera negativna mnenja o SP in njegovem idejnem tvorcu, **se je pravilom v SP najbrž smiselno podrežati in jih sprejemati kot zavezujoče**.

4. Primeri iz prakse

Najprej bi želeli izpostaviti prevod "ICB - IPMA Competence Baseline, Version 3.0". Gre za temeljno delo o usposobljenosti s področja projektnega managementa, ki ga je izdalo mednarodno združenje za projektni management - IPMA oz. International Project Management Association. Prevod je delo teama prevajalcev - članov Slovenskega združenja za projektni management ZPM z naslovom "Struktura kompetenc projektnega managementa - SKPM". Prevajalci so se odločili, da dosledno uveljavljajo pojma "**projektni management**" in "**projektni manager**".

V tiskanih medijih, kjer posebej izstopa časopis DELO, se dosledno uveljavljata pojma **menedžer** in **menedžment** skladno s Slovenskim pravopisom.

Javnosti je relativno malo poznano, da obstaja „Standardna klasifikacija poklicev“ (na kratko SKP, ki jo vodi Statistični urad Republike Slovenije, SURS). V Ur. listu RS, št. 16/2000, str. 2157 je bil tako objavljen nov poklic **projektni(-a) menedžer(-ka)** s šifro 2419.09, področna skupina 241, naziv dejavnosti: 2419 - strokovnjaki(-nje) za poslovanje.

Na Univerzi v Mariboru deluje na Ekonomsko-poslovni fakulteti **Inštitut za projektni management (menedžment)**. Predstojnik tega inštituta je izdal knjigo **Projektni management (menedžment)**.

Aktualni predsednik slovenskega PMI Chapterja je lastnik in direktor (**menedžer**) družbe (podjetja) **Inštitut za projektni management (menedžment) in informacijsko tehnologijo**.

Imamo **Slovensko združenje za projektni management (menedžment)**, ki je včlanjeno v International Project Management Association - IPMA.

V Sloveniji izhaja revija **Manager (Menedžer)**, registrirano je tudi združenje **Manager (Menedžer)**.

Bolj kot zanimivost je treba omeniti sicer zelo puristične Nemce. Njihovo nacionalno združenje je **Deutsche Gesellschaft für Projektmanagement** (s kratico GPM). Izdali so obsežno strokovno delo **Projektmanagement Fachmann**. Tudi avstrijsko združenje je zadržalo, podobno kot nemško, izvorno, rahlo prilagojeno dikcijo („k“ namesto „c“ v besedi „projekt“) **Projekt Management Austria Institut - PMA**. Podobno so se odločili tudi v nemško govorečem delu Švice.

V občasnih stikih z nekaterimi ljudmi, ki jim je obravnavana problematika blizu (npr.: Rudi Rozman, Janez Mayer, Bojan Erjavšek), so v neformalnih strokovnih razgovorih pojasnili, da po njihovem gledanju obstaja razlika med pojmom **management (menedžment) in vodenje, voditeljstvo** (leadership, liderstvo) oz. temu ustrezno tudi med pojmom **manager (menedžer) in vodja** (leader, lider).

Menimo, da je vsem dobro znana preferenca Rudija Rozmana (glej tudi Miran Mihelčič) **ravnanje, ravnateljstvo, ravnatelj, ravnalec** ipd. za pojme **management (menedžment) in manager (menedžer)**. O tej tematiki obstaja tehten članek v reviji Organizacija (1996, št. 1). Osebo lahko štejemo Rozmanu v dobro, da študentom dovoljuje alternativno uporabo izvornih angleških pojmov brez morebitnih neprijetnih posledic za njihov študijski uspeh, kar je sam v javnosti večkrat omenil.

Na prvi strani novembrske številke mesečnika PM Network, Nov. 2007, Vol. 21, No. 11, pade v oči v podnaslovu tim. "cover story **Project leaders repair and revamp** urban infra-

structure". Na notranjih straneh kazala je uporabljen pojem: "Cover story: Urban Sensibility, **Project managers** are making a high-profile push to repair and revamp" Kdo bi vedel, kaj in kako? So avtorji želeli poudariti razliko med pojmom ali smemo morda domnevati, da gre za sinonim?

Naj za konec predstavimo še primer "dobre prakse" iz časopisa DELO, 1. decembra 2007, str. 27, kjer poleg slike bujne blondinke v spodnjem perilu podjetje Lisca oglašuje zaposlitveno možnost za, citiram, "**projektnega vodjo v marketingu** (m/ž), ki bo zadolžen (op. pis.: v originalu, po mnenju lektorja je lepše "zavezan") predvsem za upravljanje (!) spletnih strani in direktni marketing. Iščemo dinamične mlajše osebe z izrazitim smislom za modo, visokošolsko izobrazbo, z dobrim računalniškim znanjem ter znanjem angleškega jezika." (konec citata) Je morda popolnoma naključno potrebno tudi strokovno znanje **projektnega managementa (menedžmenta)**? Morda kak certifikat CPM (po IPMA) ali PMP® (po PMI®)? Morda celo končan specialistični študij PM, ki je svoje čase potekal na Ekonomski fakulteti UL? Je to morda eden od primerov razvoja živega jezika, po katerem naj bi se stroka ravnala?

5. Predlogi

Predlagamo, da glede na vse navedeno pri obravnavanih pojmi

- (1) **zavezujoče** upoštevamo Slovenski pravopis;
- (2) razlikujemo pojma **vodenje** (leadership, liderstvo) od **managementa (menedžmenta)**;
- (3) razlikujemo pojma **skupina** in **team (tim)**;
- (4) uporabljamo pojem **projektni tim**;
- (5) uporabljamo pojem **projektni menedžment**;
- (6) uporabljamo pojem **projektni menedžer oz. projektna menedžerka**.

V razmislek bi dali še različico, uporabno pri prevajanju našega standarda. PMI® PMBOK® vodnik posebej poudarja, da se standard

nanaša na posamičen projekt. Na primer, na str. 35 je v naslovu "Standard projektnega vodenja za projekt" in še na str. 36 v besedilu razvidno, da gre za posamičen projekt (citata: "Pričujoči standard dokumentira informacije, ki so potrebne, da zaženemo, planiramo, izvedemo, spremljamo in kontroliramo ter končamo **posamičen projekt**."). Če bi torej to dejstvo želeli posebej poudariti, se odpira možnost za uporabo pojmov **menedžment projekta, menedžer projekta** oz. **menedžerka projekta**.

Sklep

S prispevkom ne želimo povzročati "revolucije" pri poimenovanju nekaterih pojmov s področja projektnega menedžmenta. Zagovornikov takšnih in drugačnih rešitev je veliko; edina zanesljiva trditev je, da so rešitve med seboj različne. Ugotavljamo, da je v slovenski strokovni javnosti, v uglednih strokovnih virih in v vsakodnevni praksi v zvezi z obravnavanimi pojmi izjemna neenotnost in neusklajenost, kar seveda škoduje stroki in medsebojnemu sporazumevanju. Zato smo z argumenti oblikovali predlog za morebitno konstruktivno razpravo in pozivamo vse prizadete k strpnemu dialogu.

Ta neusklajenost je velika tudi zaradi tega, ker obravnavani pojmi niso značilni le za stroko projektnega menedžmenta, pač pa so v takšnem ali drugačnem pomenu vezani tudi na druga strokovna področja.

Na določeno neenotnost kažejo, kljub svoji uglednosti, tudi citirani viri. Ti sicer ne ponujajo dokončne in enotne zavezujoče rešitve, se pa zdi, da - gledano v celoti - bolj podpirajo predlog avtorja, kot pa da ga zavračajo.

Vsakodnevna praksa lahko citirane vire upošteva, lahko pa jih tudi ignorira. Na to, žal, ne moremo vplivati. Jezik je živa stvar in se nenehno spreminja. Tako se spreminja tudi strokovno izrazje. Če gre pri izrazju za tako temeljne pojme v stroki, kot jih obravnava to besedilo, pa vendarle menimo, da jih je na nek način treba poenotiti in v koraku s časom posodabljanju. Če bo pričujoči prispevek spodbudil bralca k razmišljanju,

morebiti celo k strinjanju ali pa h konstruktivnim predlogom, potem je njegov namen dosežen.

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Darko Kovač, Andrej Bertonec

Organizational Mental Map and Conative Competences

Employees with their knowledge, skills, behavior and personal traits impact the organizational learning. The concept of organizational mental map and conative competences, as inborn underlying characteristic that is influenced by employees being involved as well as endogenous and exogenous factors, is presented. Three Slovene small to mid-sized companies were studied in respect to the individual factors, especially conative competences, of their employees. The study suggests that conative side of mind and thus conative competences can actually influence the organizational learning. What matters in contemporary management practice is how hidden potentials are set free and how they intrinsically motivate employees according to their personal differences in capabilities. As conative competences are inborn and can not be learned but only encouraged, contrary to cognitive competences, it is important to better understand employees' personal traits.

Key words: organizational learning, SME, conation, conative competences, organizational mental map

**Aleš Tankosić,
Anita Trnavčević**

Internet Marketing Communication and Schools: The Slovenian Case Study

Worldwide, some 1.32 billion people now use the Internet (Internet World Stats 2007). In the developed countries the Internet is also present in educational institutions; schools use the Internet as a means of communication with their customers. In Slovenia, however, research focusing on Internet marketing communication are rare in the field of education. This paper provides the theoretical framework and the results of the qualitative case study conducted at a school centre in Slovenia in 2005. Data were collected through group interviews and document analysis. The findings sup-

port the School Centre teachers' claim that the Internet does not enable personal contacts and the sensory collection of physical evidence, which are considered to be major disadvantages of Internet marketing communication. The teachers who consider Internet marketing communication to be an advantage stress the importance of virtuality which can function as a simulation of communication in the real world. Their adversaries, on the other hand, stress the importance of the physical world and warn us of the negative sides of virtuality.

Key words: education, marketing, internet marketing, internet marketing communication

Andreja Lutar Skerbinjek

The Role of Information for Recognising Business Opportunities

Managers need a lot of knowledge and information to make decisions and recognize business opportunities. They can acquire this knowledge and information in different ways. Accounting information, particularly information relating to the creditworthiness of business partners and competitors, is important. Such information, which can contain non-accounting information, is often derived from annual reports. The fastest and cheapest way of accessing information is via the Internet. Because searching for information about different businesses on their Web sites can be time consuming, a quicker, more efficient option is to access this information on databases that contain useful information relating to the majority of businesses in the country. In this paper, we discuss the importance of knowledge and information for recognizing business opportunities. We also analyze the appropriateness of accounting information available from five of the most widely used databases concerning Slovene and Croatian businesses, for estimating the creditworthiness of businesses.

Key words: business opportunities, knowledge, accounting information, creditworthiness information, databases,

business partners, competitors, annual reports, appropriate information, reporting agencies.

Uroš Klanšek, Mirko Pšunder

Cost Optimal Project Scheduling

This paper presents the cost optimal project scheduling. The optimization was performed by the nonlinear programming approach, NLP. The nonlinear total project cost objective function is subjected to the rigorous system of the activity precedence relationship constraints, the activity duration constraints and the project duration constraints. The set of activity precedence relationship constraints was defined to comprise Finish-to-Start, Start-to-Start, Start-to-Finish and Finish-to-Finish precedence relationships between activities. The activity duration constraints determine relationships between minimum, maximum and possible duration of the project activities. The project duration constraints define the maximum feasible project duration. A numerical example is presented at the end of the paper in order to present the applicability of the proposed approach.

Key words: project management, scheduling, optimization, nonlinear programming, NLP

Peter Friedl, Roberto Biloslavo

An Analysis of the Influence Change Method Selection Factors Show on the Evolutionary Changes in Construction Companies in Slovenia

The basic purpose of this research is to study the influence change method selection factors show on the effectiveness of evolutionary changes in construction companies in Slovenia. A combination of the qualitative and quantitative approaches to research work were applied in the course of conceptualisation and implementation of the empirical research. The findings established in the process of this research, about the nature of the application of the studied selec-

tion factors in methods of evolutionary changes implemented in business management, will enable a more effective selection from the vast pool of methods available for the implementation of changes and their more effective application. As a result, the business efficiency in companies can be expected to increase, while at the same time providing companies with more equal opportunities to compete on an international level, which is of crucial importance when it comes to corporate entities that operate in post-transition environments.

Key words: company change management, strategic management, Slovenia, construction industry, change method selection factors.

**Roland Rusjan Figelj,
Roberto Biloslavo**

Participants Groups of Influence in Slovenian Alimentary Branch

The stakeholder theory has both many defenders and many opponents. It's so not surprising, that many questions are still waiting for the researchers, to be explained. In the present paper we are

trying to give an answer, on how managers in Slovene companies perceive the significance of singular participants. These participants are the shareholders, the management, the employees, the customers, the suppliers and the state. A three members expert group research results are first reported, followed by research results among medium and large processing companies' managers in Slovenia, concluding in the last part, by a comparison analysis between the two researches results. The comparison analysis results attest surprising match between the experts' and managers' perceiving of singular participant's significance.

Key words: strategic management, stakeholder theory, participants' influence groups, processing industry

Franc Zemljič, Eva Jereb

Implementation of Innovation and Better Qualifications for Railway Employees According to the European Union Directives and Owner Interests

This contribution presents an obligatory transfer of European legislation

issued by the European Parliament and Council for the transport and infrastructure sector, into the national legal orders and adjustment of national rules and standards. Therefore, employee knowledge has to be upgraded. In addition, employees should be professionally and linguistically qualified as stipulated in current national and European legislation. A study was carried out on the variations and differences in the methodology of qualifications through researching the qualification systems in European railways. The contribution, besides an elaborated model for employee qualification according to the European committee, also contains the restructuring of accompanying factors of qualification and the implementation of qualification innovations, which influence the quality of qualification so as to achieve a better qualification of railway employees.

Key words: qualification of railways, European Union directives, qualification model, implementation of innovation, owner interests.

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POSLOVNO PRIREDITVENI CENTER -**GORENJSKI SEJEM Kranj d.d.**

Stara cesta 25, 4000 KRANJ

POŠTA SLOVENIJE d.o.o.

Slomškov trg 10, 2000 MARIBOR

RIMORJE d.d.

Vipavska cesta 3, 5270 AJDOVŠČINA

REGIONALNI CENTER ZA RAZVOJ d.o.o.

Cesta zmage 35, 1410 ZAGORJE OB SAVI

SATURNUS - AVTOOPREMA d.d.

Letališka c. 17, 1001 LJUBLJANA

SAVA - Gumarska in kemična industrija d.d.

Škofjeloška 6, 4502 KRANJ

SIEMENS d.o.o.

Dunajska cesta 22, 1000 LJUBLJANA

SLOBODNIK JOŽE

Generalni častni konzul RS v Kanadi

SLOVENIJALES PRODAJNI CENTRI

Dunajska cesta 22, 1000 LJUBLJANA

SLOVENSKE ŽELEZNICE d.d.

Kolodvorska ulica 11, 1000 LJUBLJANA

SVEA LESNA INDUSTRIJA d.d.

Cesta 20. julij 23, 1410 ZAGORJE OB SAVI

SUROVINA d.d. MARIBOR

Pobreška cesta 20, 2000 MARIBOR

TELEKOM SLOVENIJE d.d.

Cigaletova 15, 1000 LJUBLJANA

TERME MARIBOR Zdravstvo, turizem, rekreacija d.d.

Ul. heroja Šlandra 10, 2000 MARIBOR

TERMO d.d. - Industrija termičnih izolacij

Trata 32, 4220 ŠKOFJA LOKA

TERMOELEKTRARNA TOPLARNA Ljubljana d.o.o.

Toplarniška 19, 1000 LJUBLJANA

TOVARNA KLOBUKOV ŠEŠIR d.d.

Kidričeva 57, 4220 ŠKOFJA LOKA

TRIMO Inženiring in proizvodnja montažnih objektov d.d.

Prijateljeva 12, 8210 TREBNJE

UNITAS - Tovarna armatur d.d.

Celovška cesta 224, 1107 LJUBLJANA

USTANOVA SLOVENSKA ZNANSTVENA FUNDACIJA

Štefanova 15, 1000 LJUBLJANA

ZAVAROVALNICA TRIGLAV, d.d.

Miklošičeva cesta 19, 1000 LJUBLJANA

ZVEZA RAČUNOVODIJ, FINANČNIKOV IN REVIZORJEV SLOVENIJE

Dunajska cesta 106, 1000 LJUBLJANA

ŽIVILA KRANJ - Trgovina in gostinstvo d.d.

Cesta na Okroglo 3, 4202 NAKLO

ŽITO GORENJKI d.d.

Rožna dolina 8, 4248 LESCE

Mitja J. Tavčar



Kulture, etika in olika managementa

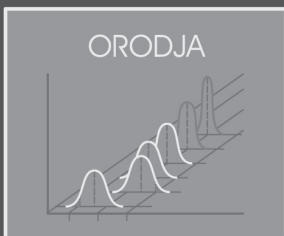
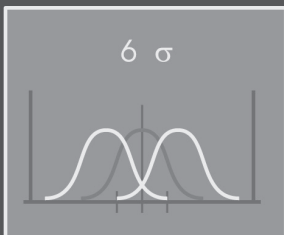
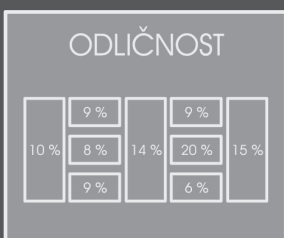
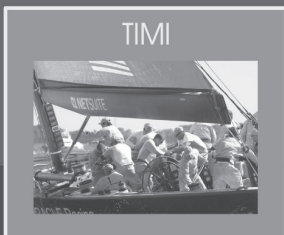
II. dopolnjena izdaja



Založba Moderna organizacija

UNIVERZA V MARIBORU - FAKULTETA ZA ORGANIZACIJSKE VEDE

UNIVERZA V MARIBORU - FAKULTETA ZA ORGANIZACIJSKE VEDE



Janez Marolt
Boštjan Gomišček

Management kakovosti