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What Kinds of Skills Are Expected by Portuguese and Polish Employers?

Abstract: The main objective of the research was to establish which skills and competencies are mostly demanded by organizations/employers in Portugal and Poland. Secondly, we wanted to determine if there are any differences in this type of skills and competencies in these two countries.

In order to analyze the skills necessary in organizations, we applied the typology of soft and hard skills. In the analysis, we had to distinguish moral competencies from soft skills, due to the specificity of the formers.

In the research, we use the mixed qualitative-quantitative methodology.

In the survey, carried out on convenience samples composed of Portuguese and Polish working students, the respondents were eager to answer one open-ended question and describe/list the skills/competencies demanded by organizations. In order to categorize the answers, we employed a two-stage process of phenomenological reduction. For the purpose of conducting a comparative analysis of the data and due to a wide dispersion of results in the case of soft skills in the two samples, we grouped the soft skills according to the ESCO and interpreted the differences by referring to the cultural dimensions introduced by Hofstede *et al.* [2011].

Keywords: Soft, hard & moral skill, Portugal, Poland, phenomenological analysis/reduction, cultural dimensions.

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The results of the study in each sample clearly indicate the preference of soft skills, a secondary interest in hard skills and a marginal demand for moral competencies. The responses concerning soft skills confirmed, to a great extent, the existence of cultural differences between Poland and Portugal, which were identified in the research conducted by Hofstede *et al.* [2011]. The results-based conclusion needs more robust acknowledgments and deeper studies.

Introduction

Although Poland and Portugal are situated on two opposite extremes of the common economic area and are both classified (in economic, social, cultural, linguistic, political etc. terms) as semi-peripheral states [Wallerstein, 1992; Santos, B. 1993; Weiss, 2005; Pięta-Cândido, 2013], they share many problems such as high unemployment rate, especially among young people. Apart from general economic conditions, the reason for this phenomenon is that professional competencies are not suited to the needs of the labour market [Handel, 2003; Taylor, 2005; Sgobbi and Suleman, 2013] and, as it was emphasized by Suleman [2012], „the relevance of skills in the contemporary workplace is unquestionable” [p. 2205]. One of the manifestations of the common educational and labor market policy in the EU is the unification of educational systems. This is beneficial when considering employees’ mobility. On the other hand, however, each domestic labor market has its own specific conditions, which influence the kinds of professional competencies that are demanded there. Domestic economy specialization may be decisive for requirements regarding hard skills. Yet, social and, more importantly, cultural environment influence the demands concerning soft skills and moral competencies. The aim of the present paper is to establish what kinds of skills are more sought for by organizations and employers in both countries, but also if the types of skills and competencies are similar. Firstly, we want to present briefly the notion of ‘competencies/skills’ and the typology (division into hard and soft skills and moral competencies) of competencies, which we applied in our research. Secondly, we describe the objectives and the methodology of the empirical research. Next, we characterize the Portuguese and Polish samples and then present the general results of the research as well as a comparative analysis regarding competencies required by employers in both countries in each category. The results, concerning soft skills in the two national samples, due to their high dispersion and impossibility to carry out any further comparative analysis, were grouped according to the European Skills/Competencies Qualifications and Occupations (ESCO) and analysed in the context of cultural differences between both societies from the point of view of cultural dimensions – according to Hofstede *et al.* [2011]. Finally, we add some considerations and limitations to the research.

The concept of skills and competencies and their division into soft, hard and moral

The concept of a competency was introduced *inter alia* by McClelland, who examined factors of career success. He claimed that career success does not depend solely on an IQ or school grades but also on other factors which McClelland called competencies [McClelland, 1973, 1998]. A significant contribution to the development of the concept of competencies was made by Boyatzis, who coined the definition of a competency, which is still used today [Boyatzis 1982]. In his view, „a competency is an underlying characteristic of a person that leads to or causes effective or superior performance” [p. 21].

In English language and literature there is some confusion between different terms (competency, competence and skill) that denote the same or similar phenomena, but we do not attempt to solve this problem here, leaving it to English native speakers.

There are many typologies of skills and competencies. They are grouped, for instance, in the work of Garcia-Aracil *et al.* [2004]. Most of the typologies cover general skills connected with work or a job title [Garcia-Aracil *et al.*, 2004]. One of the most popular, useful and applied to the job and educational market and context is a dichotomous division into hard and soft skills. But, as Chell and Athayde [2011] claim, this terminology could sometimes be misleading, as soft skills, being conceptually and apparently easy to acquire in comparison with hard skills, could become „more challenging than once was believed” [p. 616], due to a cognitive content of a skill and a context in which it is practiced or demonstrated. In this typology, ‘hard skills’, ‘technical abilities’ are the competencies in the field of technology, especially those acquired during professional education, academic education or while gaining experience; but they also include administrative procedures connected with a specific line of business of an organization [Katz, 1974/2009; Leroux and Laffleur, 1995; Cabral-Cardoso *et al.*, 2006; Maniscalco, 2010; Chell and Athayde, 2011; Laker and Powell, 2011; Rao, 2012]. On the other hand, ‘soft skills’, ‘employability skills’, ‘critical abilities’, ‘generic skills’, ‘transferable skills’, ‘key qualifications’, ‘transversal skills’, ‘non-academic skills’, ‘people skills’, are also called general, critical, universal, human, non-academic skills or skills crucial for finding and keeping a job/employment [Lopes *et al.*, 2000; Cabral-Cardoso *et al.*, 2006; Maniscalco, 2010; Chell and Athayde, 2011]. For Friberg [2012] soft skills constitute „embodied or non-certified cultural capital” [p. 1919], whereas for Laker and Powell [2011] they are „intrapersonal skills such as one’s ability to manage oneself as well as interpersonal skills such as how one handles one’s interactions with others” [p. 112].

We add to this division (into soft and hard skills) or rather distinguish in it a third category of moral competencies. This last kind of competencies is assumed by

many authors to be substantially different from the other two categories, because those competencies are not value free and they are of social nature (as opposed to individual). According to Kim and Kim [2013], moral competencies are different from the others and denote „the ability to consistently behave according to accepted ethical principles” [p. 155]. Moral competencies are „a bridge between good moral intentions and moral behavior” [Lind, 2000, p. 404]. Robichaux [2012] is of the same opinion and describes the James Rest’s Four Component Model, which is useful in developing ethical skills and, at the same time, applies it to a nursing practice. In this paper, we understand moral competencies as the ones attributed to people who are viewed as honest and virtuous, who show integrity, respect to the rights of others, detest favourism and other forms of immoral conduct that are used in order to achieve one’s aims. Such skills are denied to those who misuse power, trade in influence, resort to cronyism, use protection, embezzle, etc., whether it serves the purposes of an organization, professional group or their personal aims, irrespectively of their proficiency, mastery or other instrumental skills. This notion is similarly understood by Ossowska [1970/85], Puga and Martinez [2008] and Naughton and Cornwall [2009].

Stichter [2011] states that „Morality requires that we acquire certain moral skills, i.e. virtues./.../ virtues involve a higher motivational component, when compared to some examples of practical skills’ and ‘that every virtue is a skill, although not every skill is a virtue /.../ because not every skill deals with matters of morality” [pp. 80-85].

Objective and methodology of research

The purpose of the empirical study was to distinguish the skills that are demanded by organizations in Portugal and Poland. The research consisted of a brief self-administered survey. Respondents anonymously completed the questionnaire, which in addition to demographic questions contained a free-response and an open-ended question about employee’s skills that were demanded by the organizations in which they worked. The respondents had to list or describe them without being limited as to the type or number of skills. In the second question, we asked respondents to order the skills listed earlier from the most important to relatively less valued from the company’s perspective. The study was conducted in Portugal and Poland in January/February 2013 on convenience samples.

The Portuguese sample (N=105) consisted of working students from undergraduate and master’s programs at two higher education institutions (one public and one private), one of Setúbal (n=78) and another of Lisbon (n=27). After a primary selection, eight questionnaires were eliminated and excluded from further analysis, due to the lack of answer to the question about the skills that were demanded by the organization in which he/she worked. The final analysis sample

consisted of N=97 cases. The Polish sample (N=85) consisted of working students from undergraduate and master's programs at two higher education institutions (one public and one private), one of Białystok (n=47) and another of Warsaw (n=38).

The responses, concerning the skills and competencies, were subject to the process of phenomenological analysis and reduction [Marques and McCall, 2005; Marques, 2013]. This is a mixed quantitative-qualitative and interpretive method [Bardin, 199; Lessard-Hérbert *et al.*, 1994; Marques and McCall, 2005; Marques, 2013], which is very similar to the thematic categorization in a content analysis [Mayntz *et al.*, 1985; Bardin, 1991; Romero, 1991].

A content analysis is considered to be a research technique intended to describe objectively, systematically and quantitatively the contents of communication [Bardin, 1991; Romero, 1991]. Phenomenology is a systematic investigation of the logic and content of communication of the phenomena [Lessard-Hérbert *et al.*, 1994], or as Brocki and Wearden [2006] states: „In comparison with content analysis, which seeks to produce a quantitative analysis of discrete categories from qualitative data, in IPA [interpretive phenomenological analysis] the importance of the narrative portrayal remains paramount with the final analysis providing a detailed interpretative analysis” [p. 89]. According to Miles and Huberman [2000] and Lessard-Hérbert *et al.* [1994], a data analysis in a qualitative study, proper to the phenomenological analysis, consisting of three concurrent stages, namely the reduction/condensation of data, the representation/presentation of data and the interpretation of data. The process of data reduction, which begins before data gathering and continues even after, consists essentially of a selection, a centralization/concentration, a simplification, an abstraction and a transformation. According to Brocki and Wearden [2006], the phenomenological analysis can effectively complement quantitative studies or treat specific research issues in a different, more in-depth manner. Marques [2013] highlights that an important part of the phenomenological analysis is the reduction of data achieved in the process of classification (categorization) of the results and their assignment to common themes or categories.

The presentation of the research results was preceded by a statistical analysis [Sobczyk, 2012; Jaggia and Kelly, 2013]. For this purpose, the structure and correlation analyses were being used. Characteristic features of the studied groups of respondents from Poland and Portugal were being determined by means of the structure analysis measures, i.e.: classical measures of position (mean), positional measures of position (mode, median), classical measures of variability (standard deviation, coefficient of variation) as well as classical measures of asymmetry (index and coefficient of asymmetry). Their comparative analysis was performed. It enabled the comprehensive assessment of the studied phenomenon, which constituted the basis for drawing further conclusions. In order to examine the quantitative

dependence of the Polish and Portuguese respondents' answers and group them into the hard, soft and moral skills, the Pearson correlation coefficient was being applied [Józwiak and Podgórski, 2012].

It served to establish the strength and direction of the correlation dependence. The cause-effect relation of the studied phenomenon is reciprocal, which means that the Polish and Portuguese respondents' answers interact. Moreover, it is rectilinear, i.e. the individual growth of one variable is accompanied with the growth of the average values of another variable. The existence of the rectilinear relation was verified by means of the curvilinearity measure m_{xy} or m_{yx} [Sobczyk, 2012].

All the values of the studied dependences were lower than 0,2, which indicates linear relations.

Description and analysis of results

The average age of Polish and Portuguese respondents is 27 and 35 respectively. The Polish group is dominated by women (68%), while the Portuguese one by men (87%). The average tenure in the organization of the respondents in Portugal (10 years) is 2.5 times longer than those in Poland (4 years). The vast majority of those surveyed in both countries worked for private companies, yet in Poland these were small businesses with no more than 50 employees, while in Portugal – big companies with 251 and more employees. Most of the students in both countries enjoy job security.

When listing the skills valued by organizations, the respondents gave the minimum of 1 and the maximum of 12 names or descriptions of various competencies. In total, in the Polish sample, they indicated 312 basic categories, and in the Portuguese one – 318. Such a high number of responses and the possibility to formulate the names of competencies on one's own, resulted in the necessity to group them. It was achieved with the use of the two-stage method of phenomenological reduction, conducted by three independent people/judges for each national sample; however, one judge, who had a fluent command of both languages, belonged to both groups. In the first stage, independent judges analyzed and grouped basic categories of skills listed by the respondents, assigned them to common semantic categories (shared semantic field) with the use of terms closer to the literal meaning of competencies named by the respondents and eliminated repetitions. The second stage aimed to finally allocate them to the reduced number of skills. The final categories belonged to the three types, which are the subject to the analysis contained in this paper. The following operational definitions of the competencies were used: *soft skills* – general/universal, transversal, non-academic skills, which are not related to education or any technical function, personality traits, aims, preferences and motivation, career attributes such as the ability to communicate, to participate in a dialogue, to respond and cooperate with others,

to work as part of a team, to solve problems and conflicts, to motivate, boost, encourage, support, and facilitate, the ability to adapt, creativity, initiative, good manners, knowledge of the code of conduct; *hard skills* – technical skills acquired through professional and academic education, experience, or through practicing a profession, which are also related to administrative procedures connected with the line of business of an organization, e.g. operating machines and devices, knowledge of safety rules, computer literacy, knowledge of software, financial/accounting skills; professional and technical experience; *moral competencies* – the ability to consistently behave according to accepted ethical/moral principles, e.g. honesty, transparency, fairness, respect, courage, yet exclusive of the abilities considered by Ossowska [1970/85] as practical virtues/predispositions or pertaining to the so-called protestant ethics.

In the process of defining the above listed categories, we identified six respondents' answers which were incomprehensible or unrelated to the notion of competence/skill. They were classified as 'other categories' and were excluded from further analysis.

Among the competencies listed in the survey, the soft skills played the predominant role (Figure 1), which accounts for 75% of the responses in Poland and 79% in Portugal. The second were hard skills, which were indicated by 18% of the Polish respondents and 17% of those from Portugal. Moral competencies were mentioned least frequently, by a mere 7% of the Polish students and 4% of the Portuguese ones.

The most frequently mentioned soft skills in Poland and Portugal were: organization/management, motivation/engagement/commitment, communicativeness/ the ability to participate in a dialogue/communication, punctuality, responsibility. The most prevailing hard skills in both countries were: knowledge, technical skills, command of languages, IT skills. The most dominating moral competencies, on the other hand, in Poland and Portugal were: honesty and loyalty.

Figure 1. Categories of skills and competencies demanded by organizations/employers in the opinion of the Portuguese and Polish employees (%)

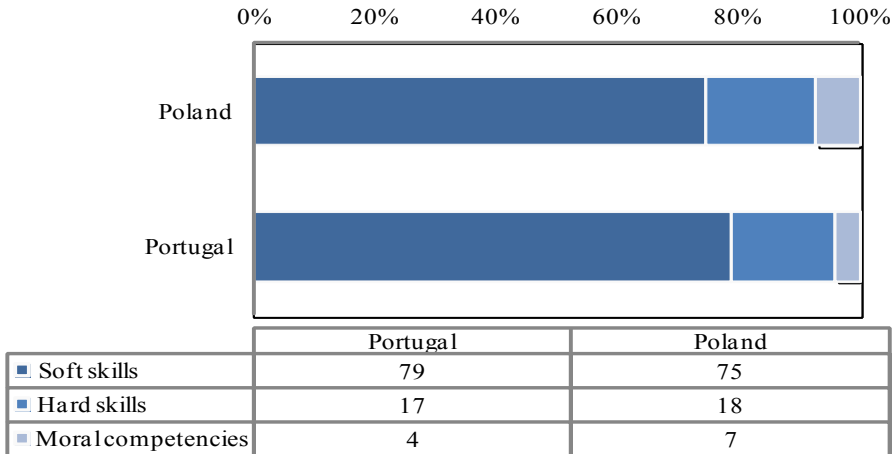
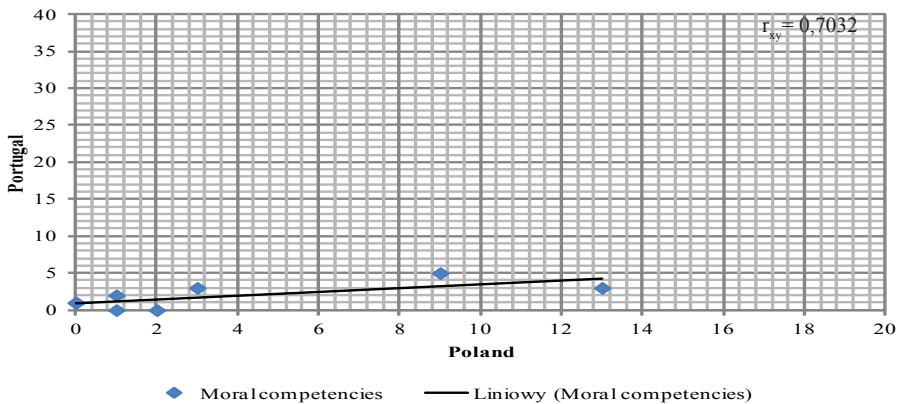


Figure 2. Moral competencies – the relation between the responses in Poland and in Portugal

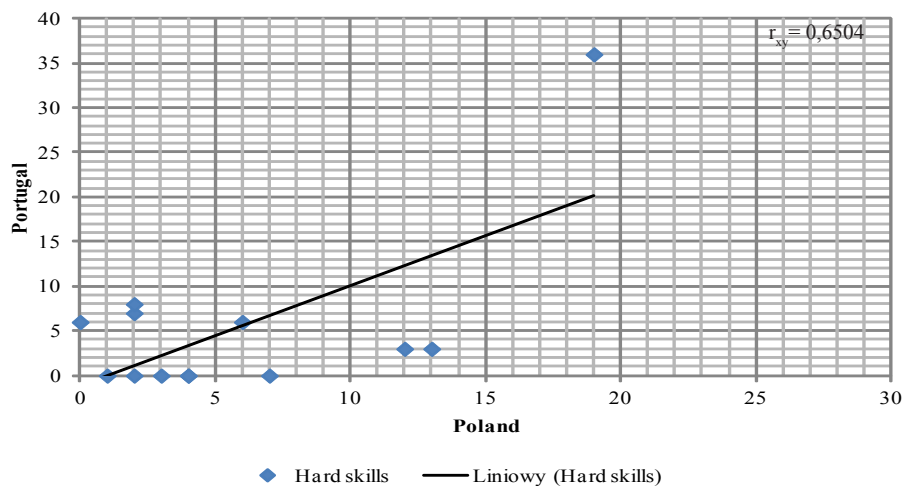


The analysis of the responses divided into soft and hard skills and moral competencies (including intermediate categories) reveals a certain dispersion of results, yet, not identical within each category. The slightest differences are observed with respect to moral competencies (Figure 2). It results from, among others, the lowest number of responses in comparison to other categories (44 responses, accounting for 5% of the total). The moral competencies indicated by both Polish and Portuguese respondents were grouped into the following categories: loyalty,

sincerity and trust. Nearly half of the respondents from Poland also pointed to honesty, which was in turn indicated by merely every fifth respondent in Portugal. Such a difference may be the consequence of the size of the organizations where the respondents worked. The majority of the students in Poland worked for small businesses, while in Portugal for big companies. In small companies, where people know each other, transparency plays a vital role, which is why there were so many 'honesty' responses. On the other hand, in big organizations employees are more anonymous and, although honesty was undoubtedly important there as well, the need to indicate it as a competency valued by an organization was weaker.

The differences between hard skills, indicated by the respondents in Poland and in Portugal, are also minor. It is probably connected with a position or a kind of tasks performed by the respondents rather than with country-dependent conditions (Figure 3). The most dramatic dissimilarities were in naming such hard skills as: IT skills, professionalism, formal education or professional experience. Hard skills that were indicated by the respondents in both countries were: technical knowledge and skills and the command of languages.

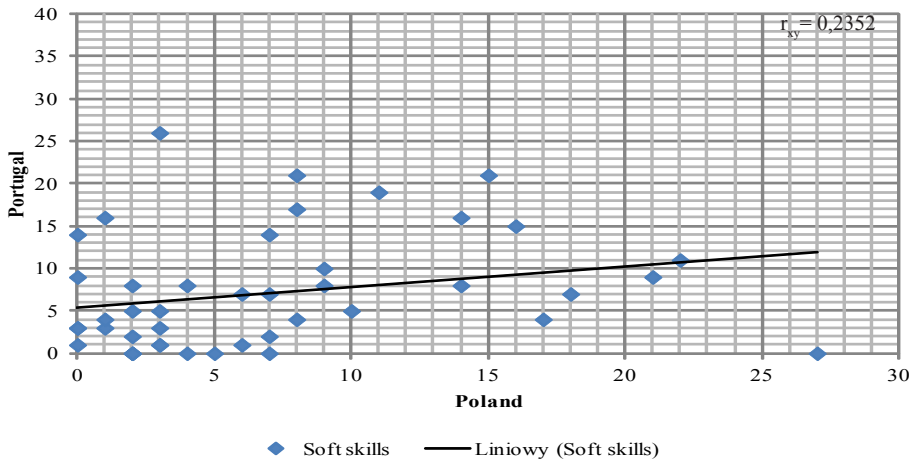
Figure 3. Hard skills – the relation between the responses in Poland and in Portugal



By far the largest differences are observed with respect to the soft skills (Figure 4). On one hand, it is the consequence of the most considerable number of responses (312 in Poland and 318 in Portugal). Among the soft skills listed by the respondents, the most common ones were: motivation/sacrifice/engagement, punctuality, ability to learn/develop, ability to work as part of a team, positive attitude/assertiveness, timeliness/ability to carry out one's duties and promises,

ability to act/take decisions quickly. However, such a noticeable dispersion of responses makes it impossible to carry out any further comparative analysis and draw conclusions. For that purpose, the soft skills were grouped according to the European Skills/Competencies Qualifications and Occupations (ESCO), which defines the following competencies: ‘language and communication’, ‘attitude and values at work’, ‘social skills and competencies’, ‘thinking skills and competencies’, and ‘application of knowledge’. The ESCO is a tool developed within the European Employment Strategy in order to unify skills and competencies for the needs of labour markets. It is accessible at the special European Council portal [ESCO, 2014]. The classification was chosen on the basis of its universality, which will provide comparative data for future research.

Figure 4. Soft skills – the relation between the responses in Poland and in Portugal

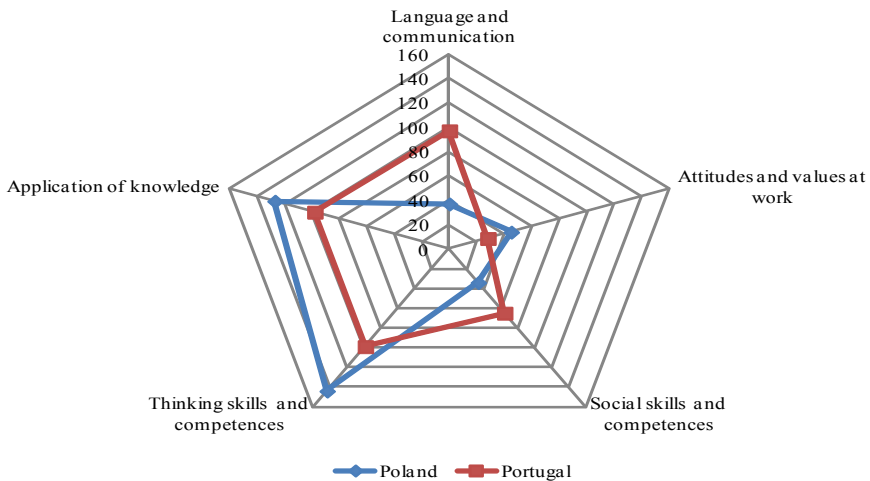


The differences in responses from both countries can stem from the conditions described in the aforementioned discussion on hard skills. However, an attempt to explain them can be made with reference to cultural conditions described by Hofstede *et al.* [2011].

The location of Poland and Portugal was analyzed according to the classification of cultural dimensions by Hofstede *et al.* [2011]. There are no significant discrepancies between Poland and Portugal with respect to the Power Distance Index (PDI) [Hofstede *et al.*, 2011]. From the perspective of this dimension, both countries are situated in the middle of the continuum between the highest PDI and the lowest PDI societies, however, slightly closer to the former ones. The results from the Uncertainty Avoidance Index (UAI) [Hofstede *et al.*, 2011] are also similar. Portugal (together with Greece) ranks first with reference to this index among all the

countries analyzed by Hofstede *et al.* [2011]. Poland also occupies a high position (in the first ten places). This means that both societies are characterized by a relatively high fear of the unknown. Poland and Portugal hold similar positions considering the Indulgence Versus Restraint (IVR) dimension [Hofstede *et al.*, 2011]. Both societies are highly restrictive, the Portuguese one slightly less than Polish. A little larger dispersion can be observed between Poland and Portugal with respect to Long-term/Short-term Orientation (LTO-WUS) dimension [Hofstede *et al.*, 2011]. Polish society attaches a little more significance to pragmatic features, which are meaningful in the long run; while in Portugal, the features important as for now are valued a little less. These differences, though, are not as considerable as is the case of the following two features. Within the Individualism Versus Collectivism (IDV) dimension, there are huge discrepancies between the countries under consideration [Hofstede *et al.*, 2011]. With regards to this dimension, Portugal is situated closer to the highly collectivist societies, while Poland is placed a little closer to the middle of the continuum, yet on the side of the individualist societies. Another dimension, which differentiates both societies, is the Masculinity and Femininity of cultures (MAS). Polish society is more ‘masculine’, while the Portuguese one more ‘feminine’ [Hofstede *et al.*, 2011].

Figure 5. Skills and competencies distribution obtained from the Polish and Portuguese samples according to the ESCO classification



As it is presented in Figure 5, the Portuguese respondents indicated more often the competencies from the ‘social skills and competencies’ and ‘language and communication’ categories, which are connected with teamwork. This may

confirm the collectivism of this society. Greater individualism of Polish society may be portrayed in the larger number of responses relating to specific competencies including: creativity/entrepreneurship, ability to learn/develop, diligence/efficiency/willingness to make an effort, conscientiousness/thoroughness/meticulousness, and, specifically, autonomy and independence. On the other hand, the collectivism of Portuguese society may be reflected in more frequent indications to such competencies as: social skills/human relations, availability, flexibility/polyvalence/adaptability as well as cronyism/favoritism/pulling the strings. Yet, it needs to be emphasized that there are responses which seem to defy this thesis.

A noticeable shift towards the masculinity of Polish culture may be confirmed by more frequent indications to the significance of the competencies which form the category of skills connected with applying knowledge. Among specific competencies, the Poles in the survey more often pointed to the features which are rather attributed to 'male' cultures such as: endurance/determination, ability to solve problems, ability to work under pressure/resistance to stress. The 'femininity' of Portuguese culture may be proven by more common indications to: good manners/politeness, empathy/friendliness/kindness, cooperation/help, and physical appearance. This also included examples that are exceptions to the rule (more frequently occurring indications to dynamism and leadership in Portugal). However, it needs to be stressed that the Polish respondents indicated the competencies proving the 'masculinity' of culture even though the sample consisted mostly of women (68%). And conversely, the Portuguese respondents reported the 'femininity' of culture although men accounted for 87% of the sample.

Another dimension in the survey was 'Indulgence Versus Restraint'. The Hofstede *et al.* [2011] research showed that Polish society is more restrictive, while the Portuguese one is more indulgent. This seems to be confirmed by more numerous responses from the Polish respondents, which form the 'attitude and values at work' category as well as more frequent indication to moral competencies, especially to honesty and loyalty. It must be admitted, though, that the analysis of specific social competencies is by no means unequivocal. Greater restraint of Polish society can be corroborated by recurring indications to the competencies which are absent in the case of the Portuguese responses: regularity as well as conscientiousness/thoroughness/meticulousness. However, the fact that the Portuguese respondents indicated to such competencies as attendance/reliability could be interpreted conversely.

As it was mentioned above, the surveyed societies are not strikingly different in the 'Uncertainty Avoidance' dimension. The survey fails to provide clear results either. Higher 'uncertainty avoidance' among the Portuguese in the survey may be presented in a slightly higher number of indications to such competencies as: organization and management or attendance at work mentioned above. Yet, on the

other hand, the Poles in the survey pointed more seldom to flexibility or mobility. It is not insignificant that the majority of the Polish sample consisted of the inhabitants of the eastern part of the country, i.e. a more conservative one.

The survey seems to confirm the already-mentioned slight difference between the societies in Poland and Portugal with respect to the 'Power Distance' dimension. It can be alternatively assumed that more frequent indications to managerial skills (organization and management, leadership) by the Portuguese respondents prove that the employees in this country are expected to participate more, which is characteristic of lower PDI countries.

While the study described in this paper is not representative, its results are by far close to the research addressed to entrepreneurs in Poland conducted by the Warsaw School of Economics, the American Chamber of Commerce in Poland and by Ernst & Young in February and March 2012, published in May 2012 [*Kompetencje*, 2012]. For the purpose of the research, the authors singled out 79 competencies, which were classified into four groups: personal skills, interpersonal skills, intellectual abilities, skills and knowledge that is general and adequate to the performed work ('hard knowledge'/professional). 53 managers from the companies of various sizes and types took part in the survey. They were to determine what competencies are expected from higher education graduates and how the level of these competencies represented by the graduates was rated. The most expected competences were, in turn: effective communication/command of languages, openness to acquiring knowledge and constant development, commitment, ability to work in a team, the ability to determine and justify priorities, ethical behavior as the basis for performance, responsibility, the ability to organize work and effective time management, flexibility and ability to adopt. On the other hand, the biggest rift between the expected competencies and the level represented by the graduates, in the opinion of the employers, was in case of: the ability to determine and justify priorities, the ability to organize work, effective time management, proper self-evaluation, understanding one's own strengths and limitations, effective communication, ability to formulate and solve problems, ability to work in a team, commitment and the ability to manage projects. Although the most demanded competence belonged to the category of hard skills, the vast majority was composed of soft skills. High position of moral competencies is also worth highlighting. The authors noticed also the differences in needs between big and small businesses. Big companies demand mostly soft skills and fluent command of languages (especially English) and the ability to use IT tools. Small companies value those skills as well. However, they by far more frequently indicate the importance of professional education or hard skills [*Kompetencje*, 2012]

Conclusions and limitations to the research

Many papers have been written about competencies and very often they are the result of empirical studies. However, the literature on the subject is still characterized by unequivocal and imprecise terminology. Additionally, the range of competing typologies is vast. Yet, this diversity does not seem to be a hindrance. Quite to the contrary, it contributes to the development of research on the phenomenon of human competencies viewed from various perspectives.

The supply-demand structure of competencies in labour markets fluctuates and here similarly instead of clear results, which would indicate present or future tendencies, we must face phenomena which are not sufficiently studied or thoroughly investigated. This also creates a welcome opportunity for researchers. As the authors of the OECD report on education put it: „The economies of OECD countries depend upon a sufficient supply of high-level workers. Educational attainment is frequently used as a measure of human capital and the level of the skills of individual workers. This indicator shows how well the supply of skills matches the demand. For example, high unemployment rates could indicate a mismatch between the educational attainment of the population and the labor-markets demand” [OECD, 2013, p. 74].

The fact that the soft skills outnumber the other two surveyed types of competencies in both sample groups and that they are much more diversified prove their popularity. However, such a significant predominance of soft skills is surprising as 59% of the respondents in the Portuguese sample and 74% in the Polish one did not hold any managerial position; therefore, it seems that the technical competencies should be in the lead. On the other hand, however, we do not know what jobs/tasks the respondents performed for their organizations. Moreover, well-developed soft skills are required in the tasks and functions connected with establishing and cultivating human relations. Unfortunately, this question was not included in the survey. One interesting result is that the responses in both countries, concerning soft skills, confirmed to a great extent the existence of cultural differences between Poland and Portugal, which were identified in the research conducted by Hofstede *et al.* [2011]. What influenced the differences in results was also the fact that the respondents in Poland were people employed in small companies and in Portugal – in big ones. The studies conducted in Poland in 2012 [*Kompetencje*, 2012] by other authors lead to similar conclusions concerning differences in competencies valued in small and big companies.

A small number of indications to moral competencies, in comparison with the remaining two kinds, may prove the lack of importance of these competencies to employers/organizations. But their low number and diversity may also mean that such competencies are regarded as inherent to employees.

The empirical study discussed in this paper was conducted on a non-probabilistic sample of working students, so it cannot be treated as the basis for generalization for

all organizations in Portugal and Poland. On the other hand, however, our objective was also to use the data collected in the investigation that essentially intended to acknowledge the diversity of skills valued by organizations in order to establish a starting point for a more comprehensive and thorough research in the future. The list of competencies collected in this study, with the use of content analysis/phenomenological reduction, will serve for the construction of a standardized instrument to be applied in a subsequent research. In future studies, it is necessary to ensure a similar structure of samples in both countries, concerning the size of companies employing the respondents. It could be matched to the structure of Polish and Portuguese businesses, where more than 80% is occupied by companies employing up to 9 people (in Poland and in Portugal in non-financial business economy more than 95% of enterprises are micro enterprises), and less than 20% - by the rest [Eurostat, 2012].

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The Chinese-perspective of Intercultural Competence Models Revisited

Abstract: Most intercultural competence models have been developed by Western experts based on Western theory and Western cultural values, and they are not culturally specific models. The lack of non-Chinese researchers to study and contribute to the construction of intercultural competence from a Chinese-perspective is a serious shortcoming, and most of the models developed by Chinese scholars are a replica of the Western models. A Chinese-perspective of intercultural competence model is indeed needed to reinterpret concepts and theories that are coined in the West, which are then widely used and generalized without any concrete-solid bases of their universality.

This paper deployed empirical study methods to analyze the content of the literature to understand the construct of Chinese-perspective intercultural competence models. Eight Chinese-perspectives of intercultural competence models formulated by Chinese scholars between 1998 and 2013 have been identified, two of them are researched in English, while six others are in Chinese. As a result, there are no significant differences in the components of those eight models, as most Chinese scholars agree that cognitive ability, emotional management and communication skills are three of the major components which constitute the Chinese version of intercultural competence models. This research is timely, and is worth conducting, due to increased Chinese investments throughout the world, and the power and influence of China as the world's largest economy. The results could be used as a guiding operational scheme to prepare business

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partners from both sides for successful cooperation.

However, one should recommend, in future research, that there be a comparison of Chinese-perspective models with Western-perspective models in order to delve deeper into the construct of the models to examine the degree to which the Chinese and Western-perspective of intercultural competence are complementary and compatible with each other.

Key words: intercultural competence, , intercultural competence model, Chinese, Chinese-perspective

1.0 Background

The definitions and constructions of intercultural competence should be defined and researched with the contribution of the scholars and experts from various cultures, backgrounds and fields. However, until now, the research paradigms and orientation of intercultural competence are mainly culturally specific based on the concepts of Western culture [Xu, 2011]. Xu [2011] claims, the lack of non-Western researchers to study and contribute to the construction of intercultural competence from the non-Western perspective is faced with a serious problem; the construction of the existing intercultural competence model is obviously Western-centric, mainly because of the establishment of Western communication theories, and Western cultural values as the bases of ideal communication.

Some researchers have included East-Asian perspectives in intercultural competence studies, but the inclusion is merely an additional component, which does not influence the construction of components themselves [Xu, 2011]. However, Luo [2013] reckons the differences between Western and non-Western perspectives of intercultural competence should perhaps complement each other and be examined for mutual compatibility.

Since China has just overtaken the USA as the world's largest economy, worth \$17.6 trillion, compared to America's \$17.4 trillion at the end of year 2014**, establishment of the Chinese-perspective on intercultural competence models is essential to support academics and expatriates in becoming more aware, sensitive and competent in their contacts with people from different cultures. Expatriates who are interculturally competent are indeed needed to ensure the success of international cooperation, and to minimize the risks present in international business [Xiao & Zhang, 2012].

** Duncan, Huges & Martosko, David (2014). America usurped: China becomes world's largest economy - putting USA in second place for the first time in 142 years, 9 October 2014. From: <http://www.dailymail.co.uk/news/article-2785905/China-overtakes-U-S-world-s-largest-economy-IMF-says-economy-worth-17-6trillion-America-falls-second-place-time-1872.html>

2.0 Problem statement, objective of the study and research method

The term, intercultural competence is not easy to define as there are different definitions presented in the literature. Although this term has been used since the 1970s and 1980s with various concepts and models [Spitzberg & Changnon, 2009, p. 9], most of them are understood as culturally universal but not culturally specific [Xu 2011]. In addition, many different terms are used as equivalents for ‘intercultural competence’ such as intercultural sensitivity, cultural competence, cross-cultural adjustment, multicultural competence, global competence [Deardorff, 2004, p. 23]. McClelland [1973] first mentioned the words ‘competence and competencies’ [Tian, Jin & Xiong, 2013], although he does not define the words [Leonardo, 2008]. However, the words are referred to in terms of skills and personality variables needed in job performance, namely, communication skills, patience, moderate goal setting and ego development [McClelland, 1973]. It is essential to look at the Chinese-perspective of intercultural competence models and delve deeper into them in order to understand Chinese interpretations of intercultural competence.

Methodologically, the academic work of intercultural competence is a Western-based approach, and the construction of intercultural competence models built by Chinese researchers mostly replicate the Western models [Xu, 2011]. Intercultural competence is not a popular topic for Chinese scholars and most of the research carried out by Chinese scholars on Chinese expatriates’ intercultural competence is formed on the basis of Western theories, conducted mostly in 2013 and 2014 as shown in table 2.1 below.

Table 2.1: Research on intercultural competence of Chinese expatriates conducted based on Western theories

Author	Title of research	Language	Western Theoretical Reference
Guo & Cai (2013)	The influence of intercultural competence on Chinese expatriates’ job satisfaction	Chinese	Dimensions of intercultural competence (Gertsen, 1992)
Tian, Jin & Qi (2013)	On the intercultural competence of Chinese employees in MNCs- a comparison between Chinese firms going global and foreign firms in China	Chinese	Intercultural competence (Spencer & Spencer, 1933; Martin & Nakayama, 2004)
Liu (2013)	Research on the selection of enterprise’s expatriates based on intercultural competence theory	Chinese	Intercultural competence (Gertsen & M.C., 1990)

He & Wang (2014)	The influence of expatriate management practices on expatriates' cross-cultural adjustment: evidence from Chinese enterprises	Chinese	Intercultural adaption (Black & Stephens, 1989)
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In other respects, this paper brings valuable insights for the intercultural competence assessment tools, constructed on the basis of a Western-perspective, which is widely used to assess the intercultural competence level of students, business travelers, business leaders and expatriates.

Hence, this paper aims to analyze the content of the literature on Chinese-perspective's intercultural competence models in order to understand the components and dimensions which constitute the models. Most of the literature analyzed is available in Chinese.

3.0 Literature review

It has been identified that eight intercultural competence models are Chinese-focused, seven of which are formulated by Chinese scholars, and one, Ting-Toomey and Kurogi's [1998] model, is a joint research by Ting from China and Kurogi from Japan. The intercultural competence model developed by Ting-Toomey and Kurogi [1998] is believed to be the first Chinese or Asian-perspective version of an intercultural competence model, which is widely used and discussed internationally most probably due to the fact it is published in English. Subsequently, six other models have been constructed in Chinese language between 2007 and 2012. Luo's [2013] Guanxi intercultural competence model is the latest research done by a Chinese scholar in 2013, in the English language. The summary of the eight mentioned models are shown in table 3.1 below, followed by a detailed description of each model.

Table 3.1: Summary of Intercultural competence models formulated by Chinese researchers

Author	Intercultural competence model	Language
Ting-Toomey & Kurogi (1998)	Facework-based model of intercultural competence	English
Gao & Wu (2007)	Intercultural competence model of Chinese expatriates	Chinese
Yang (2008)	Building intercultural competence model for company F	Chinese
Li & Tang (2010)	Intercultural competence of expatriate: theory and modeling review	Chinese
Li (2010)	Intercultural competence model and empirical research of expatriates	Chinese
Zhao (2010)	A theoretical and empirical study of Chinese expatriates competency model	Chinese

Xiao and Zhang (2012)	The components of intercultural competence in international business	Chinese
Luo (2013)	Guanxi competence as intercultural competence in business contexts – a Chinese perspective	English

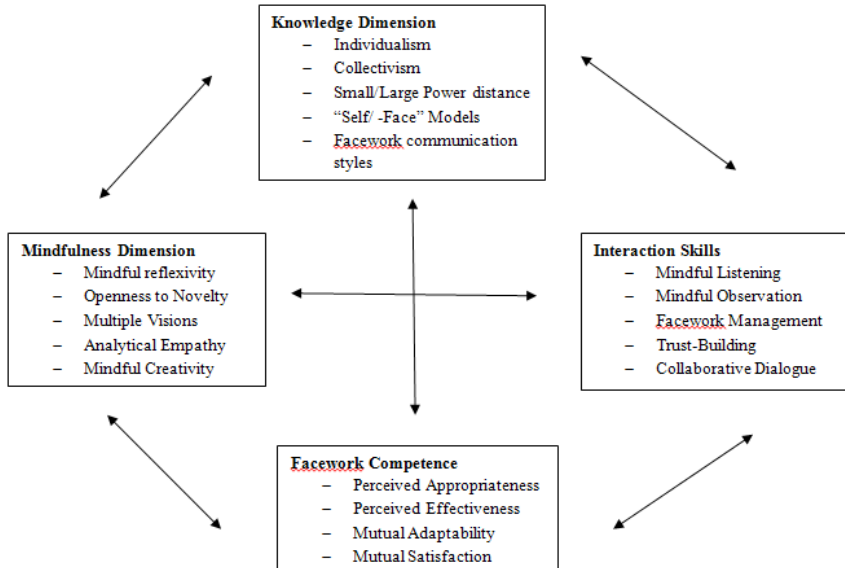
3.1 Ting-Toomey and Kurogi's [1998] facework-based model of intercultural competence

Ting-Toomey and Kurogi [1998] have developed a facework-based model of intercultural competence based on the concept of face in intercultural conflicts. Leung & Chan [2001, p. 1575] reckon face is “dignity, pride and respect” gained by an individual for his status and social achievements. Facework, according to Ting-Toomey [2005], is a communication strategy adopted by an individual to protect his face and the other person’s face in order to avoid conflict, and to ensure both parties’ images, reputations and dignity are not damaged [Ting-Toomey, 2005].

The model created with an Asian perspective which emphasizes four competences, for instance, interaction skills, knowledge, mindfulness and facework competence criteria as shown in figure 3.1. The four components are interconnected [Vallejo, 2012, p. 89], changes in a particular component will influence the outcome and performance of other components [Spitzberg & Changnon, 2009, p. 12]. The model highlights distinct intercultural competencies with emphasis on specific cultural characteristics [Vallejo, 2012, p. 89].

The cognitive component highlights the essential knowledge in understanding the cultural differences between individualism and collectivism, power distance, the concept of face, and communication style. The mindfulness dimension represents the significance of being open-minded in an unfamiliar situation, owning multiple visions, and being creative, reflexive and empathetic. The skill component features interactive abilities in listening, observing, trust building, facework management and collaborative dialogue. Spitzberg & Changnon [2009, p. 12] states that cognitive, emotion and skill components have resulted in the fourth component, facework competence criteria, to embrace the higher possibility of appropriate, effective, adaptive and satisfying results.

Figure 3.1 Ting-Toomey and Kurogi's [1998] facework-based model of intercultural competence



3.2 Gao and Wu's [2007] intercultural competence model of Chinese expatriates

The intercultural competence model is based on a survey conducted with three different categories of returned Chinese expatriates; specifically, human resource professors in a renowned university, cultural management and consulting experts, and middle and top level management personnel. The questionnaire was designed using the Delphi technique based on two selected intercultural competence measures, the Behavioural Assessment Scale for Intercultural Competence (BASIC) designed by Koester & Olebe [1988] to monitor the communication behaviours, and Intercultural Sensitivity Scale (ISS) developed by Chen and Starosta's [2000] to measure intercultural sensitivity scale; and two interpersonal competence measures, Interpersonal Communication Inventory or ICI [Bienvenu, 1971] to examine the communication skills, and Social Problem-Solving Inventory-Revised or SPSI:R [D'Zurilla & Nezu, 1990] to assess the ability of problem solving. Fifty completed questionnaires were received at the first stage and second stage of the survey, which took place respectively from November to December in 2014, and January to February in 2007.

At the conclusion of the study, researchers carried out in-depth interviews with eight selected senior managers to gather seventy-five attributes before narrowing

them down to twenty-two attributes which comprised three components as shown in figure 3.2 below. Intercultural cognitive ability indicates the competence to recognize the intercultural issues with the cultural knowledge of the host country, which will make a positive impact on expatriate job performance. Emotional management capability covers the ability of expatriates to maintain positive attitudes towards an unfamiliar environment in a host country and confidence enhancement after attending emotional management training. The third component, interpersonal skills, derive from the cognitive and emotional management components, pertain to the enhancement of communication skills after acquiring cultural knowledge of the host country and confidence in cultural immersion. The interpersonal skills dimension can constitute the indicator needed to assess the effectiveness of intercultural training programs in a Chinese multinational company.

Figure 3.2 Gao and Wu's [2007] intercultural competence model of Chinese expatriates

Component	Dimension
Emotional Ability	Initiative-driven
	Able to restrain frustration
	Able to endure psychological pressure
	Has courage to take responsibility
	Self-reflection and self-correction capability
	Has strong sense of commitment
	Has confidence to live and work in other cultures
Cognitive ability	Respects and comply with laws and regulations of host country
	Participates in host country's cultural events, e.g. festivals
	Respects host country workplace etiquette and cultural management ability
	Respects the cultural values of colleagues in host country
	Recognizes and interprets cultural differences
	Obtains political, economic, and cultural information of host country
	Practices "When in Rome, do as Romans do"
Interpersonal skills	Able to observe
	Communicates effectively across cultures
	Takes initiative to establish contact with local people
	Maintains and deepens ties with local people
	Able to perform teamwork with those of different cultures
	Manages interpersonal relationships in a flexible way
	Able to manage cultural conflicts
Enjoys social interaction	

3.3 Yang's [2008] intercultural competence model for company F

The intercultural competence model has been created for company F which operates in the metal industry and is present in thirty-two countries. A specific intercultural competence model is vital for company F due to the fact that clients and some of the employees are from different cultural backgrounds. Out of fifty-one employees in Company F, eight are expatriates from the United Kingdom, India and Australia.

Prior to the survey, five performance indicators, namely, job accomplishment, innovation, teamwork, contribution to organization and career development have been identified after consultation with the Human Resources Department. To weigh the importance of those five indicators, data was collected and analyzed based on employees' performance appraisals from the previous year, and face-to-face interviews conducted with the supervisors of the employees. As of result, it showed that job accomplishment was the most important indicator according to 60% of employees surveyed, followed by teamwork ability, 20%, contribution to organization, 10%, innovation and career development, with 5% respectively. With this result, the performance of the employees is evaluated.

On the other hand, a questionnaire designed by Shanghai Jiatong University was used to gauge the level of employees' intercultural adaptation, specifically on their intercultural intelligence, emotional intelligence and self-monitoring capabilities. 93% of forty-two employees returned the questionnaires, but only forty questionnaires were completed.

The results gathered from the performance evaluations and questionnaires were then examined via Statistical Package for the Social Sciences (SPSS). Four components with fifteen dimensions have been discovered as per figure 3.3.

The first component formed is about one's inclination to immerse oneself into other groups and cultures, and the openness to try and learn new things. Emotional intelligence (EQ), as a second component, highlights the emotional dimension in controlling and understanding one's own emotions, and recognizing other's emotions. The third component emphasizes the cognitive ability of the employees or the ability to be aware and recognize cultural differences of people from different countries, and also those from different provinces in China. The last component underlines the ability to adjust one's own behavior in different cultural settings, especially when one communicates and works with someone from **culturally** and linguistically diverse **backgrounds**.

Figure 3.3 Yang's [2008] intercultural competency model for company F

Component	Dimension
Cultural immersion ability	Enjoys getting along with people from different cultural backgrounds
	Empathic and able to change perspective
	Willing to share one's knowledge with others
	Open minded, likes to experience new things
Emotional Intelligence (EQ)	Accept people from different cultural backgrounds and values
	Emotionally stable, able to control own emotions
	Recognizes and understands own emotions
	Recognizes emotional change in others and adopts flexible solution
Awareness of cultural differences	Recognizes cultural differences when in contact with people from other cultures
	Recognizes cultural differences between China and the West, and the other provinces in China
	Respects faith, religion and customs of others
Ability to adjust	Fluent in English language, both written and spoken
	Able to adjust own communication style, e.g. tones, intonation and gestures
	Able to understand and judge the behaviour and communication style of others
	Has experience working in cross-cultural teams

3.4 Li and Tang's [2010] intercultural competence theory and model of Chinese expatriates

The intercultural competence model is developed based on the model of Gao & Wu [2007] for employees of a power plant equipment manufacturer. The targeted company was aware of the importance of expatriate intercultural competence once the company doubled the operating income by winning twenty overseas projects in a short span of time between 2002–2007.

Eleven successful overseas project managers were selected to participate in the Behavioral Event Interview or BEI to delve deeper into the successful or challenging significant incidents, which took place in the last six to twelve month period during their overseas assignments. Behavioral Event Interview questions focus on exploring how respondents dealt with challenging situations in the past as their past behaviour could be one of the indicators of their future performance. The interview results were gathered to conduct subsequent interviews with nine Human Resource specialists in order to understand the performance of the project managers based on their behaviour, and to sort out the definition and the component of intercultural competence.

It was concluded that the cognitive, emotional and communicative components are the three main components for this model. The cognitive component highlights a few key words such as 'learning, experience, cultural knowledge, understanding,

information gathering and internalization?; whereby, the emotional component refers to ability to handle emotions, that includes being able to manage stress, being flexible, possessing the drive to take initiative, being able to adapt, and being culturally and politically sensitive. As for the communication component, many managers emphasize that strong cultural knowledge and good communication skills in English are a solid base for business negotiations, coordination and cooperation. Worth mentioning, Li and Tang [2010] emphasize that proficiency in English is not enough, Chinese expatriates should also be able to communicate in the local language as it helps them to adapt and understand local culture.

Figure 3.4 Li and Tang's [2010] intercultural competence theory and model of Chinese expatriates

Component	Dimension
Cognitive ability	Possess rich cultural knowledge
	Being understanding
Emotional ability	Feel sympathy towards others
	Being interculturally sensitive
	Know how to manage emotion
Communication skills	Have good communication skills
	Perform duties with appropriate behavior and character
	Show respect to others

3.5 Li's [2010] intercultural competence model of Chinese expatriates

The survey was carried out on 209 expatriates from Chinese multinational companies such as Huawei, BWI, Broad group, Zhong Liang group, Hisense group and Sany group. The questionnaire, uses a Likert scale, was designed based on three intercultural competence assessment tools, the Behavioural Assessment Scale for Intercultural Competence (BASIC), the Multicultural Awareness Knowledge and Skills Survey Questions (MAKSS) and the Intercultural Adjustment Potential Scale (ICAPS). The questionnaire, after consultation with Michael Morley of the University of Limerick and Kevin Orr of the University of Hull was distributed to twelve middle-top managers from Chinese multinational companies, possessing overseas work experience. The data collected was then analysed via Statistical Package for the Social Sciences (SPSS), which has concluded four essential components for a Chinese-perspective intercultural competence model, namely, personal traits, cognitive ability, intercultural communication and intercultural motivation.

The personal traits component features the behavioral characteristics such a being open-minded, responsible, confident, mentally healthy and physically and emotionally stable. The communication component is another personal trait which not only emphasizes proficiency in languages, but it enhances the skills needed

to establish, maintain and deepen the relationship with the local residents, and to respect and adapt to local social norms.

Meanwhile, the cognitive ability urges one to respect and comply with laws and regulations of the host country, to understand cultural differences, to be able to solve problems within different cultural frameworks and to be aware of the latest developments of the host country in order to relay accurate insights back to corporate headquarters.

The motivation component focuses on how Chinese expatriates cope with the challenge of living in a foreign land, as well as having the competence to perform the critical business development role. Therefore understanding the cultural background of the local residents before having contact with them is vital.

Figure 3.5 Li's [2010] intercultural competence model of Chinese expatriates

Component	Dimension
Interpersonal skills	Emotionally stable
	Has self-confidence
	Open-minded
	Responsible
	Physically and mentally healthy
Cognitive ability	Respects and complies with laws and regulations of host country
	Able to adapt to the life in host country
	Respects the host culture and workplace etiquette
	Able to recognize and judge cultural differences
	Able to communicate in local language
	Able to integrate with different races and cultures and business entities
	Aware of host country's development and able to provide accurate insights
	Able to solve problems in different frameworks
	Able to participate actively in cultural activities of the host country
Able to understand job roles of the management team in host country	
Communication skills	Able to adapt to organizational culture of the host country
	Able to adapt to local's social forms
	Able to take the initiative to establish contact with local residents
	Able to maintain and deepen ties with locals
	Able to perform teamwork with others from different cultures
	Able to get along with the local residents when outside of work
Motivation to succeed	Able to study the cultural background prior to contacting others
	Enjoys living in an unfamiliar cultural environment Confident of the business growth in the foreign subsidiary

3.6 Zhao's [2010] intercultural competency model of Chinese expatriates

Zhao [2010] employed an empirical study to finalize nine components of the intercultural competence for Chinese expatriates are based on the work of various scholars such as Ruben [1976], Mendenhall & Oddou [1985], Koester & Olebe [1988], Wiseman & Hammer [1989], Earley & Moakowski [2004], Earley & Ang [2003], Tan [2004], Wang and Sun [2008], Fan [2009] and Gao & Wu [2007]. Seventy-two dimensions obtained from content analysis were used to design a questionnaire, and data collected was then analyzed via Statistical Package for the Social Sciences (SPSS). As shown in figure 3.6, the nine components can be divided into three main elements, cognitive capabilities, emotional abilities and behavioral or social skills. The first three components are grouped into cognitive capabilities, which comprise cognitive ability, initiative (openness) and alignment with corporate culture. The desire for achievement, intercultural motivation and stress management ability constitute the emotional abilities of the ideal Chinese expatriate who has had contact with others from different cultures. The final element, behavioral or social skills are integrated by the three other components which emphasize the significance of communication skills, team work and project management skills. In conclusion, Zhao (2010) reckons empirical research has its limitation in formulating an intercultural competence model for Chinese expatriates as the content selection is too random, and therefore this method should be further tested and researched.

Figure 3.7 Zhao's [2010] intercultural competency model of Chinese expatriates

Components	Dimension
Initiative (openness)	Open minded, curious about new things, accepts new ideas, courage to try, and willing to share with others
Need to achieve	Strong desire to succeed, not content with the status quo, always sets high goals for oneself, likes to complete challenging task, and demands oneself to overcome obstacles
Communication skills	Able to communicate clearly and give feedback openly
Teamwork	Promotes team collaboration to achieve goals
Motivation	Takes action from intercultural motivation, self-confidence and courage, adjusts to different cultures and interests
Cognitive ability	Aware and recognizes cultural differences and views culture from a different perspective
Stress management ability	Copes under pressure with psychological endurance and self-adjustment ability
Project management Skills	Responsible for the content of the project, to ensure the smooth progress of the project execution
Corporate culture compatibility	Personal traits should be compatible with corporate culture, e.g. concept of individualism, collectivism, etc.

3.7 Xiao and Zhang's [2012] intercultural competence model in international business

The Behavioural Event Interviews (BEI) were conducted with six senior managers, who were also pursuing their Executive Master of Business Administration (EMBA) studies in Wuhan, the capital city of Hubei province. They were chosen to join the interview due to their extensive overseas work experience. For this reason, the goal was to understand their cross-cultural experience and to compare their successes and failures during their overseas engagements. Subsequently, a Delphi technique was adopted to conduct a quantitative survey with sixty-one engineers and management leaders from two multinational automotive companies. The questionnaire which shortlisted seventy key dimensions of intercultural competence was then modified based on the feedback gained from the two hundred and fifty-six HR specialists. Finally, twenty-five finalized dimensions of intercultural competence have been identified and analyzed via Statistical Package for the Social Sciences (SPSS), as displayed in figure 3.7.

As a result, a four-component intercultural competence model was developed, with two second-level dimensions in each component, with a total of twenty third-level dimensions. The four mentioned dimensions are cognitive ability, communication skills, adaptation ability and ability to act. Xiao and Zhang [2012] concluded that local employees who are very competent with excellent work performance are not necessarily capable in cross-border business. In other respects, employees possessing superb personal qualities might not have high potential to work internationally. All in all, training, selection and intercultural competence assessment are interrelated.

Figure 3.7 Xiao and Zhang's [2012] intercultural competence model in international business

Component	Second-level dimension	Third-level dimension
Cognitive ability	Culturally sensitive	Have sharp observation skills
		Ability to perceive and recognize cultural differences
	Cognitive desire	Likes to experience different cultures
		Being empathetic and open-minded
Communication skills	Communication skills	Understands other languages and non-verbal behaviors
		Has a flexible interpersonal style
	Willingness to communicate	Participates actively in various cultural activities
		Interacts actively with people from different cultures
		Keep contact with people from different cultures

Adaptation ability	Social adaptation	Adapts to job demands and understands job scope
		Adapts to different living environments and necessities
		Adapts to different ways of communicating and doing things
	Psychological adaptation	Healthy physically and mentally, and positive emotionally
		Ability to withstand loneliness, stress and failure
Ability to act	Ability to execute	Ability to manage conflicts
		Ability in team communication and collaboration
		Ability to act quickly
	Decision-making capability	Ability to analyze and judge
		Possesses professional knowledge and experience

3.8 Luo's [2013] Guanxi competence as intercultural competence in business contexts

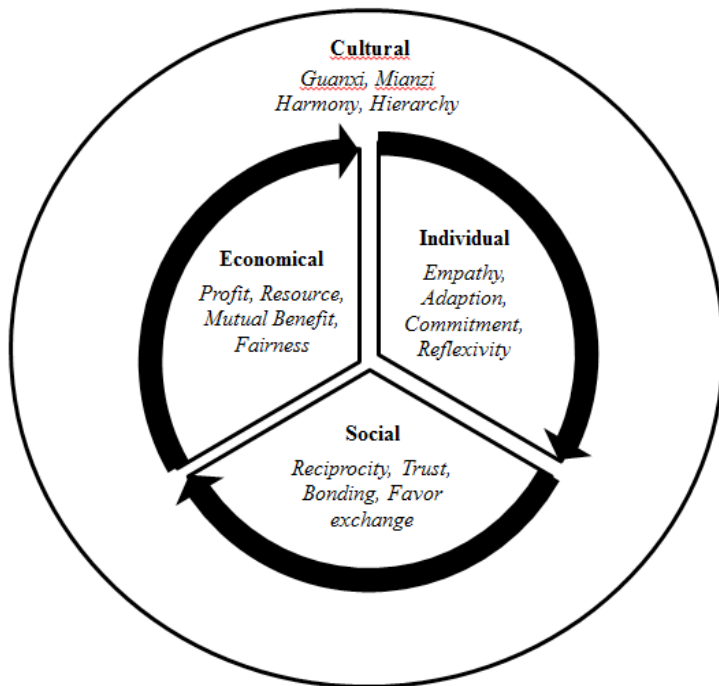
Luo [2013] argues that most intercultural competence models are developed based on Western-perspectives and a non-Western perspective model is needed to look into possible synergies and correlations between these two perspectives. In reference to the work of Ting-Toomey and Kurogi [1998] on the facework-based model of intercultural competence, Luo is strongly convinced that *guanxi* is an important component in non-Western perspective or Chinese-perspective of an intercultural competence model in a business context. *Guanxi* is a Chinese word, it means the reciprocal exchange between two individuals to enhance their social and business relationships [Fan, 2002]. *Guanxi* is also a network of social relations between individuals, which is hierarchically structured [Hwang, 1987].

Luo [2013] applied three research methods to identify the constructs of *Guanxi*-based intercultural competence model. The three methods consist of a focus group interview with ten Master of Business Administration (MBA) Chinese students from Wuhan University, subsequent literature reviews based on the work of Chinese scholars on *guanxi*, and a content analysis technique conducted via internet search engines such as Baidu, Google and Yisou.

Eventually, the results derived from the analysis have contributed to the formulation of a *Guanxi*-based model of intercultural competence with four key business-oriented components as seen in the following figure. The cultural component constitutes four dimensions in Chinese business culture, *Guanxi*, *Mianzi* or face, harmony and hierarchy, influences the other four components, as all components are interconnected. The economic component emphasizes the practices in business such as fairness, mutual benefit, business resources and profit. Whereby the individual component underlines the characteristics of personal attitudes, for instance, empathy, adaptation, commitment and reflexivity. The emotional level of the dimension is embedded in the social component. which contains favor exchange, bonding, trust and reciprocity.

Luo's model is very culture-specific, it presents a cultural reference and a guide to work effectively with Chinese business counterparts, and to encourage other scholars to study and to explore intercultural competence from a culture-specific and non-Western perspective angle, in addition to the existing dominant Western-perspective intercultural competence models.

Figure 3.8 Luo's [2013] Guanxi competence as intercultural competence in business contexts



4.0 Conclusion and future research

Vallejo [2012], a non-Chinese scholar, has summarized all the intercultural competence models and its components by grouping them into three key components, which are cognitive capabilities, emotional abilities and behavioral or social skills. Based on Vallejo's [2012, p. 106–109] table, this paper has categorized the above-mentioned eight Chinese-perspective models into the same format as shown below in figure 4.0. The figure shows clearly that all components can be identified and grouped into Vallejo's [2012] template, but the Chinese-perspective components and Vallejo's [2012] Western-perspective components are not necessarily the same.

There are no significant differences in the constructions of those eight models. Most Chinese scholars agree that cognitive ability and communication skills are two of the major components, which constitute the Chinese version of intercultural competence models. They also emphasize that emotional abilities such as emotional management, motivation, stress management, high Emotional Intelligence and desire for achievement are essential for Chinese expatriates to live and work abroad. Since the objective of the paper is to analyze the Chinese-perspective of intercultural competence models, it is worth comparing these models with other models formulated with the Western-perspective in future research.

Figure 4.0 Summary of the components of Chinese-perspective intercultural competence

Author	Component 1 (Cognitive capabilities)	Component 2 (Emotional abilities)	Component 3 (Behavioral/social skills)
Ting-Toomey (1998)	Knowledge dimension	Mindfulness dimension	Interaction skills
			Facework competence criteria
Gao & Wu (2007)	Cognitive ability	Emotional ability	Interpersonal skills
Yang (2008)	Cultural immersion ability	High Emotional Intelligence (EQ)	Ability to adjust
	Awareness of cultural differences		
Li & Tang (2010)	Cognitive ability	Emotional ability	Communication skills
Li (2010)	Cognitive ability	Motivation to succeed	Interpersonal skills
			Communication skills
Zhao (2010)	Cognitive ability	Motivation	Communication skills
	Initiative (openness)	Stress management ability	Teamwork
	Corporate culture compatibility	Need to achieve	Project management skill
Xiao & Zhang (2012)	Cognitive ability	Adaptation ability	Communication skill
			Ability to act
Luo (2013)	Cultural knowledge	Individual characteristics	Social skills
		Economic practices	

Some of the Chinese-perspective models have been developed specifically for a particular Chinese company, such as the models of Yang [2008] for company F, and Li and Tang [2010] for a power plant equipment manufacturer, and other models are more universal, not dedicated to any specific industries.

To delve deeper, future studies can also look into the similarity or differences between the construction of intercultural competence models for the same industry players in different provinces in China, due to the fact that China, with over twenty provinces, has multiple ethnic groups who practice different cultural norms, with working professionals who possess different intercultural competencies.

Furthermore, it is obvious that although those described eight models are developed specifically for Chinese, they do adopt Western methodologies or with Western influence in their fieldworks, such as the employment of Western assessment tools, Behavioural Assessment Scale for Intercultural Competence (BASIC) by Gao and Wu [2007] and Li [2010], Behavioural Event Interview (BEI) technique used by Li and Tang [2010], and Xiao and Zhang [2012], as well as analysing results via Statistical Package for the Social Sciences (SPSS) by Li [2010], Zhao [2010], Xiao and Zhang [2012].

In short, six models developed by Gao and Wu [2007], Li [2010], Li and Tang [2010], Zhao [2010], Xiao and Zhang [2012] and Luo [2013] are etic models with some Western influences derived from outside a Chinese culture. On contrary, the models of Ting-Toomey & Kurogi [1998] and Yang [2008] are emic models, which have concluded the intercultural competence of Chinese expatriates according to indigenous definitions.

The comparison between Western and non-Western perspective of intercultural competence model should use to explore the potential synergies between them without bringing any adverse implications and connotations [Luo, 2013]. A Chinese-perspective of intercultural competence model is indeed needed to reinterpret concepts and theories that are coined in the West, which are then widely used and generalized without concrete-solid bases of their universality. Western-based intercultural competence models need to be scrutinized and analyzed thoroughly to confirm, to modify, or to deny altogether for their applications in different cultures. Unfortunately, the current practices in academia pay less attention to such an initial analysis.

The components identified in this paper do not represent the general picture of the intercultural competence model of the Chinese expatriates, as most of the respondents who took part in the research were mainly the 'returned expatriates'. Hence, it is highly recommended to conduct a consequent study which would involve Chinese expatriates who are currently living and working overseas and who might able to provide better insights and portrayals of the expatriate.

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Individual-Level Determinants of International Orientation of a Firm: A Study Based on Global Entrepreneurship Monitor Data

Abstract: In recent decades economic integration and globalization processes facilitate the firms' internationalization. The main determinants of that process are divided into three categories – internal factors, external factors and personal characteristics of an entrepreneur. The latter is considered to be the most important and will be the research subject in this article. The objective of this paper is to analyze the determinants of firm internationalization on the individual level and to verify whether entrepreneurial traits of the founder are indeed important for the internationalization.

The research is based on the Global Entrepreneurship Monitor data, using which we employ independent sample t-test and one-way ANOVA analyses to test the hypotheses. The results show that the only variable which determines international orientation of a company is the level of education of an entrepreneur. All other characteristics of an entrepreneur do not correlate with international orientation of a firm. Results obtained make important contribution to entrepreneurship research - they show significant shift in international entrepreneurship trends - internationalization is getting more available, less risky and more natural for entrepreneurs of different ages, backgrounds and individual characteristics. Findings may be useful for further international entrepreneurship research.

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Keywords: internationalization, international orientation, international entrepreneurship

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Introduction

The research on the firm internationalization has evolved during the last decades. First studies on international business focused on the large multinational organizations, which develop on the domestic market before going abroad. Starting from 1990s, the terms “*international new ventures*” [Oviatt & McDougall 1994] or “*born globals*” [Rennie 1993] have evolved, which meant companies that do not need to develop on the domestic market first, whereas they start acting on international markets immediately after their founding. Empirical researchers have often focused on the determinants of the internationalization process [Oviatt & McDougall 1994; Madsen & Servais 1997]. The main factors which influence internationalization decision are usually divided into three parts – external factors, internal factors and entrepreneurial traits, where the last one usually plays the most important role. In this paper we focus on the individual-level determinants of firm internationalization. The aim of this article is to analyze the determinants of internationalization on individual level and to verify whether entrepreneurial traits of a founder are indeed very important for the firm internationalization.

In the first section of the paper we present theoretical background of the problem, focusing on the research on internationalization and rise of a term “international entrepreneurship”. The second section states the hypotheses basing on the aim of the research. Third section describes research methods, sample, variables and measures. After that, we present research results and, finally, discussion of obtained results.

Theoretical background

The firm internationalization process became a subject of interest for researchers at the end of the 1960s. These studies focused on attitudes and behavior of firms in the process of going international [Li & Cavusgil 1995, p. 261]. Welch and Luostarinen [1988, p. 36] state that it is the process of increasing involvement in international operations across borders, where firm expands its activities geographically, moving gradually from the domestic market to foreign markets. Internationalization was defined by Melin [1992] as a strategic change process, which results in the increase of an international enterprise involvement, and therefore, its knowledge about foreign markets, which is the core element of strategic development. Another author emphasizing the importance of knowledge in internationalization process is Beamish [1990, p. 77] who first suggested that firm starts internationalizing in the moment when its owners or managers realize the importance of involvement into foreign markets and in his later publications emphasized that during internationalization and transactions with foreign companies, a firm increases its knowledge about direct and indirect impact of the international activity [Beamish

et al. 1997]. Despite the dissimilarities in definitions, researchers agree that there are different stages of the internationalization process.

Researchers argue whether internationalization is a gradual, step-wise process. Majority of definitions show dynamics of the internationalization process, emphasizing its relation to change and development. However, several findings suggest that internationalization process is random. *Stage theories* [Johanson & Wiedersheim-Paul 1975; Johanson & Vahlne 1977] argue that firm's international involvement gradually increases as it gains knowledge and experience in the international arena. The most famous Johanson and Vahlne's [1977, 1990] internationalization model, *The Uppsala Internationalization Model*, rests on the resource-based theory [Andersen 1997]. The basic assumption of this model is that performing activities creates internal assets such as skills and knowledge. The Uppsala model is based on the assumptions that firm strives to increase its long-term profit and to keep risk-taking at a low level, therefore internationalization process tends to proceed slowly. The theory also suggests that companies start exporting to neighboring countries, with less psychic distance, created by language differences, culture, political systems and disturbing the flow of information between the firm and the market. Another stage model, an *innovation-related model* [Bilkey & Tesar 1977; Cavusgil 1980, Reid 1981, Czinkota 1982] states that internationalization decision is an innovation for the firm. It focuses on the learning process in connection with adopting an innovation.

The studies on firm internationalization before the 1990's are mainly based on the large multinational corporations, which developed from large, mature domestic companies [Oviatt & McDougall 1994, p. 45]. However, due to the changing global business environment - technological progress, opening borders, better speed and quality of international communication, increasing numbers of people with the international experience – it became possible to conduct business activities in different countries with limited resources. This caused the emergence of the *international entrepreneurship* phenomenon [McDougall & Oviatt 2000; Zahra & George 2002]. International entrepreneurship concept combines elements of international business theory and entrepreneurship theory. It was first defined by McDougall [1989, p. 389] as new international firms which from the beginning of their emergence take part in an international activity. Since then, early internationalizing firms became a very popular research subject. They have been called “born globals” [Rennie 1993; Knight & Cavusgil 1996], “international new ventures” [Oviatt & McDougall 1994], “global start-ups” [Jolly et al. 1992] and “instant internationals” [Preece et al. 1999]. Such firms are defined as business organizations that, from inception, seek to derive significant competitive advantage from the use of resources and the sale of outputs in multiple countries [Oviatt & McDougall 1994, p. 49]. Possessing limited financial resources and foreign markets

knowledge, those firms manage to start international operations from or near founding.

Research hypotheses

The researchers divide determinants of firms' internationalization into three groups – internal factors, external factors and entrepreneurial characteristics [Oviatt & McDougall 1994; Madsen & Servais 1997]. External factors facilitating internationalization are usually connected with sectoral, regional or national export culture, specific demand characteristics or foreign trade facilitators [Zahra & George 2002, p.18]. The internal determinants of internationalization are suitable products or services, company mission to become internationally active, human or financial resources availability. This research will not focus on the macro factors and firm-level traits, as it will analyze the individual-level determinants of firm internationalization.

Definitions of early internationalizing firms differ significantly, however, one thing all researchers agree on, is that the individual traits of the entrepreneur influence pace of internationalization. Global vision of the founder appears to be the key feature of born global firms. Gabrielsson et al. [2008] suggest that the key resources such as experience and knowledge are owned by an entrepreneur himself. There are opinions [Kundu & Katz 2003] that in the early stages of born global firms development, entrepreneur individual traits, but not external characteristics, play significant role in the process of entering foreign markets. Therefore we hypothesize that:

Hypothesis H1: International orientation of early-stage entrepreneurial activity is positively related to the level of entrepreneurial intentions.

It is discussed that one of the most significant traits of an international entrepreneur is his level of education and foreign languages knowledge [Zucchella et al. 2007]. International experience and high education level may explain the global vision of an entrepreneur, as these characteristics lower the psychic distance between the domestic market and foreign markets. Knight and Cavusgil [1996] suggest that international entrepreneurs see the whole world as their market without borders. Thus, we hypothesize that:

Hypothesis H2: International orientation of early-stage entrepreneurial activity is positively related to the level of education of an entrepreneur.

Experience of the entrepreneur is characterized by the level of education, previous international experience and what is more significant, by earlier experience in his specialization. Many researchers stress that international entrepreneurs are young proactive managers, however there is evidence that their international experience and job experience play significant role in the intensity of internationalization [Chetty & Campbell-Hunt 2004]. Gaining job experience and international

experience requires a certain amount of time, hence the entrepreneur's young age can not determine early internationalization. Thus, we argue that:

Hypothesis H3: The international orientation of early-stage entrepreneurial activity is positively related to the age of entrepreneur.

International entrepreneurship is characterized by large amount of risk. Internationally oriented entrepreneurs seek for their chances on the foreign markets and adapt their activities to the changing environment. Therefore, it is obvious that more internationally oriented entrepreneurs use more chances for development in the international markets. Accordingly, we propose that:

Hypothesis H4: International orientation of early-stage entrepreneurial activity is positively related to the level of perceived opportunities.

Hypothesis H5: International orientation of early-stage entrepreneurial activity is positively related to the level of perceived capabilities.

Research methods, sample, variables and measures

The research carried out to test the above hypotheses is based on Global Entrepreneurship Monitor study. It is the biggest scientific project of researching entrepreneurship worldwide. It was started in 1999 when 10 countries took part in the study, in 2013 it encompassed 70 economies, 75% of world population, 90% of world GDP. In GEM project the same research is repeated in yearly cycles. Moreover, the same methodology is applied in all countries taking part in the research. This results in full comparability of the results both longitudinally and across countries. GEM has two main research parts. Adult population survey (APS) is completed by a representative sample of at least two thousand adults in each economy. The total sample in 2013 accounted for 197.000 respondents across the globe. The purpose of APS is to capture the attitudes, activities and aspirations of society in the field of entrepreneurship. APS has two main advantages over official statistics: it captures not only people registering their activity but also entrepreneurs-to-be – people who intend to start a business or even start to prepare to do so, and it provides in-depth view into motivations, attitudes and aspirations of entrepreneurs. The other part of the research is called National Experts Survey (NES) where national experts are consulted on entrepreneurial framework conditions – factors that explain the nature and level of entrepreneurship in the economies: financing, governmental policies, governmental programs, education and training, research and development transfer, commercial infrastructure, internal market openness, physical infrastructure and cultural land social norms.

While entrepreneurship is a multifaceted phenomenon with many different meanings, GEM operationalizes entrepreneurship as: any serious attempt at new business or new venture creation, such as self-employment, a new business

organization, or the expansion of an existing business, by an individual, a team of individuals, or an established business. While entrepreneurship is defined narrowly as new business activity, it takes a broad view of what it recognizes business activity to be. This has its implications in measuring the level of entrepreneurship in GEM that is not limited to registration of new business activity, but it is treated rather in behavioural than in institutional terms, and it includes both entrepreneurial activities aimed at registration of new business entities, and entrepreneurial activities in the existing organizations.

GEM employs socio-economic approach in its research [Kelley et al. 2012; Xavier et al. 2013; Amorós & Bosma 2014]. This model attempts to present entrepreneurship in two ways. First of all, it documents how entrepreneurship is affected by national conditions. It also shows that three major components of entrepreneurship cover: attitudes, activity and aspirations. These three components are presented in the form of conglomerate creating innovations, economic growth and new jobs. Detailed interactions between the components are subject to analysis.

In GEM it is important to differentiate a phase of the business activity [Amorós & Bosma 2014], while phases before its formal implementation are also subject to the analysis, and most attention is paid to the phase of early-stage activity. It is one of the significant elements distinguishing GEM from other research projects on entrepreneurship where registration of new entities is studied on the basis of data of national statistical offices which does not enable good insight in the nature of the new enterprises. In modeling the process of entrepreneurship, GEM applies three stages of economic project development. Depending on the phase an entrepreneur is in, they may be defined as a nascent entrepreneur, a new entrepreneur or an established enterprise. In the GEM methodology, nascent entrepreneurs are individuals who have not established business activity yet but they plan to, and those who have already established business activity and are at its early stage – up to 3 months from establishment of business activity. Business activity is considered to be new in the case of paying wages for the period of three months. Such persons start to take first steps to establish a business: they obtain financial support, do the business planning, apply for legal protection of their intellectual property. New entrepreneurs are people who established their business activities from 3 to 42 months before the beginning of the research.

To test the hypotheses we use the Global Entrepreneurship Monitor data from 2012. We use the pooled sample of 13 383 nascent entrepreneurs from 69 countries. We employ independent sample t-test (where the independent variable has dichotomous distribution) and one-way ANOVA analyses (where the independent variable has distribution other than dichotomous). To measure international orientation we use the 'suexport' variable which answers the question: What proportion of your customers will normally live outside the country? The answers are coded as 1 – 90-

1005; 2–76-90%, 3–51-75%; 4–26-50%; 5–11-25%, 6–1-11%; 7–none. Therefore, the higher the value the lower the international orientation of the entrepreneur. The variables for entrepreneurial intentions, opportunities recognition and self-assessment of capabilities are simple variables with dichotomous distribution with yes/no answers. Age is presented in two variables: first is simply the age of the respondent, second is the age category. Education is presented in UN categories: pre-primary education, primary education or first stage of basic education, lower secondary or second stage of basic education, (upper) secondary education, post-secondary non-tertiary education, first stage of tertiary education, second stage of tertiary education.

Research results

Tables 1 and 2 present the means and results of independent sample t-test analysis for entrepreneurial intentions, opportunities recognition and perceived capabilities.

Table 1. Comparison of means (Authors' own work based on GEM data).

		N	Mean	Std. dev.	SE of mean
Entrepreneurial intentions	No	3740	6,00	1,550	,025
	Yes	6507	6,00	1,538	,019
Opportunities perception	No	3296	5,97	1,573	,027
	Yes	6548	6,01	1,533	,019
Perceived capabilities	No	1579	6,04	1,459	,037
	Yes	8798	5,98	1,564	,017

Table 2. Results of t-test analyses (Authors' own work based on GEM data).

	t	df	Sig.	Mean's diff.	SE of diff	95% conf. range	
						Lower	Higher
Entrepreneurial intentions	,183	10245	,855	,006	,032	-,056	,068
	,182	7743,299	,855	,006	,032	-,056	,068
Opportunities perception	-1,150	9842	,250	-,038	,033	-,103	,027
	-1,140	6456,433	,254	-,038	,033	-,103	,027
capabilities	1,301	10375	,193	-,055	,042	-,028	,138
	1,365	2278,512	,172	-,055	,040	-,024	,134

International orientation of entrepreneurs with and without entrepreneurial intentions is exactly the same, therefore hypothesis H1 must be rejected. There are some differences for opportunities recognition and perceived capabilities, however, those differences are not statistically significant, so hypotheses H4 and H5 must also be rejected.

As GEM provides the exact age of the respondent it could be possible to run a correlation analysis between age and international orientation. Its results are presented in table 3.

Table 3. Correlation of age and international orientation (Authors' own work based on GEM data)

		Age	International orientation
Age	Pearson's correlation	1	-,018
	Sig.		,071
	N	13091	10352
International orientation	Pearson's correlation	-,018	1
	Sig.	,071	
	N	10352	10529

Results of correlation analysis point out that international orientation is not related to age, however, it has to be noticed that international orientation is a variable that is not continuously distributed so correlation analysis is not fully reliable in this case and additional analysis should be performed. Tables 4-6 present the results of one-way ANOVA analysis for age and international orientation, where age has been grouped in 6 categories.

Table 4. Results of one-way ANOVA of age and international orientation (Authors' own work based on GEM data).

	N	Mean	Std. dev.	Std. err.	95% confidence interval for mean	
					Lower bound	Upper bound
18-24	1980	6,02	1,501	,034	5,96	6,09
25-34	3442	6,01	1,540	,026	5,96	6,06
35-44	2590	6,00	1,543	,030	5,94	6,06
45-54	1657	5,96	1,589	,039	5,88	6,04
55-64	777	5,93	1,603	,058	5,82	6,04
65-120	76	5,67	1,708	,196	5,28	6,06
Total	10522	5,99	1,547	,015	5,96	6,02

Table 5. Results of one-way ANOVA of age and international orientation (Authors' own work based on GEM data).

	Sum of Squares	df	Mean Square	F	Sig.
Between groups	15,542	5	3,108	1,298	,261
Within groups	25176,044	10516	2,394		
Total	25191,586	10521			

Table 6. Results of one-way ANOVA of age and international orientation (Authors' own work based on GEM data) (*. The difference is significant at 0.05).

		Mean diff. (I-J)	Std. err.	Sig.	95% confidence interval	
					Lower bound	Upper bound
18-24	25-34	,011	,044	,803	-,07	,10
	35-44	,024	,046	,601	-,07	,11
	45-54	,061	,052	,233	-,04	,16
	55-64	,092	,066	,161	-,04	,22
	65-120	,351	,181	,052	,00	,71
25-34	18-24	-,011	,044	,803	-,10	,07
	35-44	,013	,040	,742	-,07	,09
	45-54	,051	,046	,274	-,04	,14
	55-64	,081	,061	,188	-,04	,20
	65-120	,340	,179	,058	-,01	,69
35-44	18-24	-,024	,046	,601	-,11	,07
	25-34	-,013	,040	,742	-,09	,07
	45-54	,037	,049	,444	-,06	,13
	55-64	,068	,063	,286	-,06	,19
	65-120	,327	,180	,069	-,03	,68
45-54	18-24	-,061	,052	,233	-,16	,04
	25-34	-,051	,046	,274	-,14	,04
	35-44	-,037	,049	,444	-,13	,06
	55-64	,030	,067	,653	-,10	,16
	65-120	,290	,182	,110	-,07	,65
55-64	18-24	-,092	,066	,161	-,22	,04
	25-34	-,081	,061	,188	-,20	,04
	35-44	-,068	,063	,286	-,19	,06
	45-54	-,030	,067	,653	-,16	,10
	65-120	,259	,186	,163	-,11	,62
65-120	18-24	-,351	,181	,052	-,71	,00
	25-34	-,340	,179	,058	-,69	,01
	35-44	-,327	,180	,069	-,68	,03
	45-54	-,290	,182	,110	-,65	,07
	55-64	-,259	,186	,163	-,62	,11

The results of one-way ANOVA between age and international orientation suggest that younger entrepreneurs are more internationally oriented. However, the differences between age categories are not statistically significant, therefore hypothesis H3 has to be rejected as well.

Tables 7-9 present the results of one-way ANOVA analysis between education of the entrepreneur and international orientation.

Table 7. Results of one-way ANOVA of education and international orientation (Authors' own work based on GEM data).

	N	Mean	Std. dev.	Std. err.	95% confidence interval for mean	
					Lower bound	Upper bound
Pre-primary education	522	6,40	1,218	,053	6,29	6,50
Primary education or first stage of basic ed.	868	6,37	1,351	,046	6,28	6,46
Lower sec. or second stage of basic ed.	1718	6,20	1,419	,034	6,13	6,27
(Upper) secondary education	3433	5,99	1,509	,026	5,94	6,05
Post-secondary non-tertiary education	1403	5,87	1,574	,042	5,79	5,95
First stage of tertiary education	2331	5,74	1,702	,035	5,67	5,81
Second stage of tertiary education	121	5,62	1,795	,163	5,30	5,94
Total	10396	6,00	1,542	,015	5,97	6,03

Table 8. Results of one-way ANOVA of education and international orientation (Authors' own work based on GEM data).

	Sum of Squares	df	Mean Square	F	Sig.
Between groups	468,691	6	78,115	33,490	,000
Within groups	24232,274	10389	2,332		
Total	24700,965	10395			

Table 9. Results of one-way ANOVA of education and international orientation (Authors' own work based on GEM data) (*. The difference is significant at 0.05) (Primary - Primary education or first stage of basic education; Lower secondary - Lower secondary or second stage of basic education; Post-secondary - Post-secondary non-tertiary education; Tertiary I - First stage of tertiary education; Tertiary II - Second stage of tertiary education).

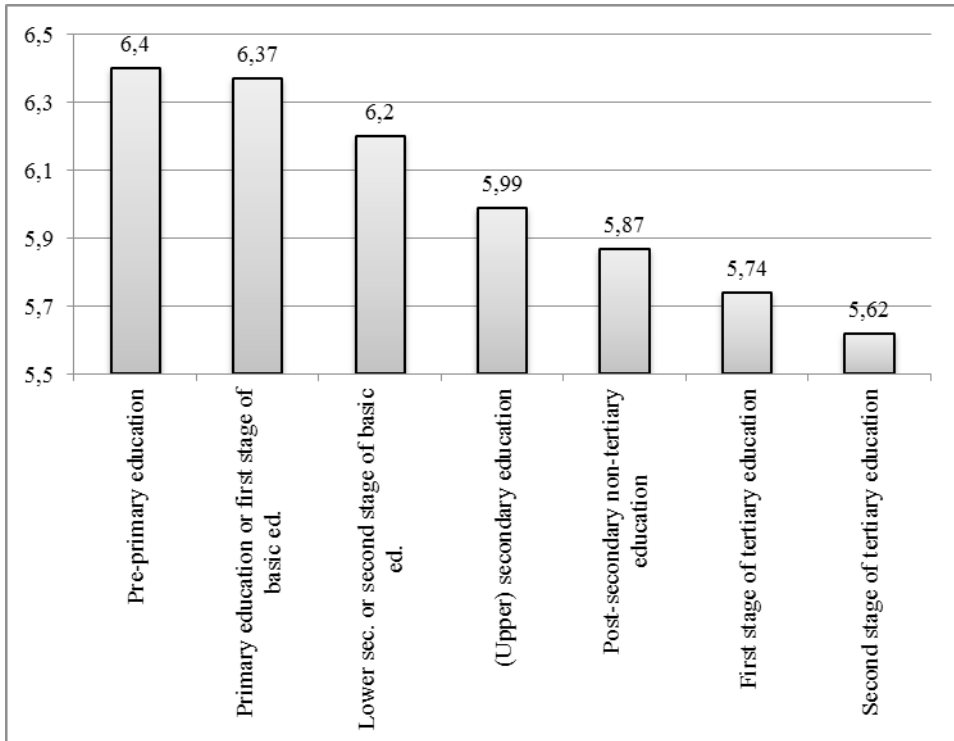
		Mean diff. (I-J)	Std. err.	Sig.	95% confidence interval	
					Lower bound	Upper bound
Pre-primary education	Primary	,030	,085	,721	-,14	,20
	Lower secondary	,195*	,076	,011	,04	,34
	(Upper) secondary education	,402*	,072	,000	,26	,54
	Post-secondary	,524*	,078	,000	,37	,68
	Tertiary I	,658*	,074	,000	,51	,80
	Tertiary II	,777*	,154	,000	,47	1,08

Primary education or first stage of basic ed.	Pre-primary education	-,030	,085	,721	-,20	,14
	Lower secondary	,164*	,064	,010	,04	,29
	(Upper) secondary education	,372*	,058	,000	,26	,49
	Post-secondary	,494*	,066	,000	,36	,62
	Tertiary I	,628*	,061	,000	,51	,75
	Tertiary II	,747*	,148	,000	,46	1,04
Lower sec. or second stage of basic ed.	Pre-primary education	-,195*	,076	,011	-,34	-,04
	Primary	-,164*	,064	,010	-,29	-,04
	(Upper) secondary education	,207*	,045	,000	,12	,30
	Post-secondary	,330*	,055	,000	,22	,44
	Tertiary I	,464*	,049	,000	,37	,56
	Tertiary II	,582*	,144	,000	,30	,86
(Upper) secondary education	Pre-primary education	-,402*	,072	,000	-,54	-,26
	Primary	-,372*	,058	,000	-,49	-,26
	Lower secondary	-,207*	,045	,000	-,30	-,12
	Post-secondary	,122*	,048	,011	,03	,22
	Tertiary I	,256*	,041	,000	,18	,34
	Tertiary II	,375*	,141	,008	,10	,65
Post-secondary non-tertiary education	Pre-primary education	-,524*	,078	,000	-,68	-,37
	Primary	-,494*	,066	,000	-,62	-,36
	Lower secondary	-,330*	,055	,000	-,44	-,22
	(Upper) secondary education	-,122*	,048	,011	-,22	-,03
	Tertiary I	,134*	,052	,009	,03	,24
	Tertiary II	,253	,145	,081	-,03	,54
First stage of tertiary education	Pre-primary education	-,658*	,074	,000	-,80	-,51
	Primary	-,628*	,061	,000	-,75	-,51
	Lower secondary	-,464*	,049	,000	-,56	-,37
	(Upper) secondary education	-,256*	,041	,000	-,34	-,18
	Post-secondary	-,134*	,052	,009	-,24	-,03
	Tertiary II	,118	,142	,405	-,16	,40
Second stage of tertiary education	Pre-primary education	-,777*	,154	,000	-1,08	-,47
	Primary	-,747*	,148	,000	-1,04	-,46
	Lower secondary	-,582*	,144	,000	-,86	-,30
	(Upper) secondary education	-,375*	,141	,008	-,65	-,10
	Post-secondary	-,253	,145	,081	-,54	,03
	Tertiary I	-,118	,142	,405	-,40	,16

The comparison of means suggests that there is a significant increase of international orientation with the rise of education of the entrepreneur. That is also confirmed by results of one-way ANOVA. Moreover, almost all differences among means in different groups are statistically significant, except for the differences between entrepreneurs with pre-primary education and primary education or first stage of basic education, and also between entrepreneurs with post-secondary, non-tertiary education and first and second stages of tertiary education. Those results

provide support for hypothesis H2. Figure 1 presents the graphical interpretation of the results.

Figure 1. Relation between education and international orientation (Authors' own work based on GEM data).



Discussion, limitations, contributions and future research

The most important variable of the level of entrepreneurship internationalization according to the research is the level of education of an entrepreneur. The results clearly show that the higher the level of education of an entrepreneur is, the higher the international orientation of his firm. Not only high educational level provides knowledge about foreign economies, trade mechanisms and business networks, it also comprises a certain amount of international experience provided by mobility semesters, working in multinational groups of students and international research projects. It gives entrepreneur a global vision which lowers the psychic distance between the domestic market and foreign markets.

Although previously researchers have often stressed that international entrepreneurs are young proactive managers, we suggest that currently the age

of entrepreneur does not define international orientation of a company. Results of our research expose shift in the age groups of international entrepreneurs. It shows that globalization and economic integration mechanisms force constant development and change in the entrepreneurial environment. Several decades back, when internationalization research have become a topic of interest for the economic sciences, younger entrepreneurs turned out to be more internationally oriented. However, our research proves that this trend has been declining, as differences between age categories of international entrepreneurs are not statistically significant. It can be caused by worldwide availability of international business studies, government support programs for international entrepreneurs and expanding internationalization culture. Being proactive and having global vision is not enough in the contemporary environment, whereas entrepreneur's education, international experience and job experience also play significant role in the intensity of internationalization.

Another significant outcome which shows change in the entrepreneurial environment is lack of dependence between international orientation and levels of entrepreneurial intentions, perceived opportunities and perceived capabilities. As international entrepreneurship meant larger amount of risk before, international entrepreneurs were associated with risk-oriented mentality. Now worldwide economic integration causes that firm internationalization is getting more and more available. Therefore, personal characteristics of entrepreneurs such as low risk aversion tend to have less influence on the level of entrepreneurial orientation of the company.

Results obtained make important contribution to entrepreneurship research. Data presented shows significant shift in international entrepreneurship trends - internationalization is getting more available, less risky and more natural for entrepreneurs of different ages, backgrounds and individual characteristics. Global Entrepreneurship Monitor data provides quality basis for entrepreneurship research, as it gives global international picture of current trends. GEM data not only shows the official picture of entrepreneurial activity, it provides a more detailed picture like behavior of entrepreneurs starting or managing a firm.

The research provided has several limitations. Due to specific aims of the research, many variables were not taken into consideration. The results would probably be more precise if individual-level characteristics would be analyzed together with macro factors and firm-level variables. Another limitation is a problem of considerable amount of data provided by GEM which allows to obtain more credible results, however at the same time does not allow to differentiate the results between specific sub-categories like countries, age groups, etc. Therefore, in the future research in this area we suggest to take into consideration more variables which can determine international orientation of a company and to provide more specific results.

Conclusion

The article has described evolving of the internationalization term in the literature and rise of the “international entrepreneurship” in the last decades. It has defined determinants of internationalization stating that personal characteristics of an entrepreneur have always been considered one of the most important factors of internationalization. The research provided has verified the above statement by analyzing determinants of firm internationalization on the individual level.

The results show that the only variable which determines international orientation of a company is the level of education of an entrepreneur. However, all other characteristics of an entrepreneur do not correlate with an international orientation of a firm. Results obtained make important contribution to entrepreneurship research - they show significant shift in international entrepreneurship trends - internationalization is getting more available, less risky and more natural for entrepreneurs of different ages, backgrounds and individual characteristics. International orientation of a company is getting more common among the entrepreneurs.

The outcomes indicate that empirical investigators interested in firms internationalization can not only base their research on the internationalization theories of the researchers from previous decades, as the current entrepreneurial environment is constantly changing. Therefore, empirical research is needed to understand the determinants of firms internationalization more completely.

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Propiedad y estructura familiar en una empresa turística mexicana

Resumen: Las Pequeñas y Medianas Empresas (Pymes) familiares son parte importante de la economía en varios países del mundo, como una de las principales impulsoras de empleos. La forma en que operan, la manera en que se conforman, así como la organización de los miembros de la familia que se encuentran en ella, puede ser determinante. Esta investigación, da cuenta sobre un estudio de caso de una empresa restaurantera mexicana, enfocada a su estructura familiar como un factor importante que puede relacionarse con la dirección de la empresa para su trascendencia. Para lograr lo anterior, se realizaron entrevistas a miembros de la familia que forman parte de esta, así como a empleados no familiares. Con base al análisis de tres dimensiones: la propiedad, la sucesión y la estructura; los resultados evidenciaron una tendencia de que la propiedad de este tipo de empresas puede ser de cualquier miembro de la familia, siempre y cuando esté trabajando en ella e involucrado constantemente. Además, la forma de relacionarse suele ser efectiva, pues al estar formada por miembros de una misma familia, existe la suficiente confianza para crear un ambiente familiar más que laboral, lo que hace que la repartición de las ganancias sea equitativa.

Palabras Claves: Propiedad, familia, empresa, turismo, Pymes.

Abstract: Small and medium sized enterprises (SMEs) are important components for

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the economy in different countries around the world, since they are employment promoters. The way they operate, how they are formed, and how their family members organize are vital for their success. This paper provides a case study of a Mexican restaurant company, that focuses in their family structure as an important factor, which is related with the business management and their growth. In order to achieve this, the study consists in a series of interviews to different members of the family and employees that are not part of the family. The data analysis was based in three dimensions: the property, the succession, and the structure. The results showed a tendency where this type of businesses are owned and/or managed by any family member, as long as he/she is working and constantly involved in the company development. Moreover, the way they relate is usually effective, since it is composed by members of the same family and there is enough trust to create more a family environment than a work one. Thereby, the profit distribution is equitable to all their members. **Keywords:** Property, Family, business, tourism, Sme's.

1. Introducción

Durante la década de 1960 se elaboraron trabajos relacionados con la estrategia y la estructura de la empresa familiar, destacando las debilidades y fortalezas de lo que significa ser una empresa familiar, La Salle (2014). Permitiendo estudiar las distintas situaciones que no las permiten llegar a generaciones futuras, así como la falta de especialización en el área. Sin embargo, el estudio de las pequeñas y medianas empresas surgió a partir del desarrollo económico y a la generación de empleos que estas brindan. (Sánchez, 2010; Amaro, 2011)

Así pues, las empresas familiares han sido uno de los elementos de mayor eficiencia social, Ginebra (1997) y mostrándose como la forma predominante de una organización empresarial, representando el 45% de PIB y del 45% a 70% de empleos en México, Martínez (2014). En lo que refiere en el rubro internacional Japón representa el 69.5% de empleos, Cazares (2006) y la Unión Europea muestra que el 25% de las empresas que ocupan los 100 primeros lugares, son de naturaleza familiar, según Fernández (2007).

Una empresa familiar, es aquella en la que los miembros de una o varias familias tienen una participación suficiente en el capital y controlan la toma de decisiones (Vallejo, 2005; Belausteguigoitia y Balaguer, 2013; Vallejo G.C., 2009; Ocegueda, Ibarra y Hernández, 2008), con el fin de que continúe de una generación a otra, (Vallejo, 2005). Así mismo la bolsa Mexicana de Valores refiere que el 73% de las empresas que cotizan en ellas, son familiares según Belausteguigoitia y Balaguer (2013)

Para la creación de una pyme familiar, probablemente existan distintos problemas, como es, que los mismos miembros de la familia no cuenten con la experiencia suficiente, por lo que Carazas (2010) menciona que carecen de conocimientos que les permita apreciar de manera más positiva su empresa; Rivera (2013) por su parte

complementa esta opinión haciendo referencia que es importante que el fundador transmita su visión, su modelo de negocio y su pasión por la empresa, designándoles responsabilidades y comprometiéndolos en sacar la empresa adelante. Aunado a esto, hay diversas variables que impactan en su funcionamiento, tomando como base el desempeño, se puede afirmar que este pudiese tener un impacto en la estrategia e incluso en la redefinición o reforzamiento de las características identitarias de la empresa, de igual forma una relación a la inversa o combinada (Ochoa, Jacobo, Leyva & López, 2014). Así como estos factores, existen otros de igual riqueza e importancia, que tiene relación directa con el tipo de empresa familiar.

A medida que crece la empresa se requieren de más directivos, y los fundadores ejercen una gran influencia sobre su cultura organizacional, Quimis (2005), provocando entre las causas de su extinción, un conflicto entre estructuras de familia y empresa pensando que no hay personas que puedan llenar sus expectativas, (Santoro 2006; Quimis, 2005; Preciado, Flores y Fong, 2012), así también se puede notar que el vínculo familiar y el vínculo de trabajo, se configuran en una grave confusión entre lo familiar y lo laboral, Duarte (2007) ocasionando falta de comunicación afectando la eficiencia de la administración según Dodero (2005).

El rol del profesional tiene como misión colaborar con la empresa cuando decide crecer, pues la posición de la empresa comienza a desarrollarse de manera más amplia, Castillo (2010); así pues, cuando la empresa va creciendo, puede ser que las expectativas y lo deseos que se tenían al comienzo ya no sean los mismos, Cobián (2009). Ramírez (2011), hace referencia al propietario, como el único supervisor y quien lleva toda la carga del negocio, ocurriendo en muchos casos un retraso en la sucesión de su poder, de tal manera que la resistencia a su retiro es más cómodo, que tomar una postura activa para solucionarlo.

Por su parte Romero (2006) menciona que la interacción positiva entre familia y empresa, implica tres condiciones primordiales; siendo estas, las relaciones familiares, unión e intereses comunes; en segundo lugar la clara estructura organizacional y, por ultimo un esquema de administración y gobierno con independencia de los intereses familiares. Así pues una empresa familiar ideal, es aquella que la garantiza con cada uno de sus miembros, optimizando aspectos económicos, éticos y afectivos, Nava (2005). Si las personas que están encargadas de la empresa no saben compartir el sueño de la familia, quizás estas no consigan crecer consecutivamente. En el mismo tenor Zambrano (2011), expresa que cuando las empresas familiares enfrentan conflictos internos y externos, estas toleran las crisis, porque sienten que abandonar el negocio es abandonar la familia; los líderes o jefes de familia pueden incluso imponer el traspaso a otro miembro, lo que puede ocasionar que el decidir formar parte de algo sin alternativas y esto es algo a lo que se pueden enfrentar los herederos de las empresas familiares. Con base en todo lo anterior, se planteó realizar una investigación descriptiva para identificar la estructura familiar de las pymes turísticas familiares, a través de un estudio de caso.

2. Referentes teóricos

Las pymes pueden mejorar el entorno económico, creando condiciones que contribuyen a su establecimiento, crecimiento y consolidación para impulsar la incorporación y comercialización de las micros, pequeñas y medianas empresas a la actividad exportadora, Proméxico (2014). Lo que significa, que si las pymes familiares se aplican al desenvolvimiento productivo de su empresa, estas podrían llegar a alcanzar un crecimiento que los lleve a presentar sus productos por medio de la importación y exportación hacia nuevos mercados.

Yáñez (1998), señala que las pymes pueden amortiguar de forma positiva la caída del empleo y la producción, además de ayudar al desarrollo económico en cada región; en ese mismo sentido, Herrera (2011), menciona que éstas conforman la mayoría de las empresas establecidas con rentabilidad económica y un gran número de empleos, creando desarrollo regional por medio de personas emprendedoras.

Definición y características de las empresas familiares

La empresa familiar es una organización de carácter económico, en la que recae en un grupo de personas unidas por un vínculo familiar, los órganos de control y administración de la ella, (Gobierno de España, 2008). Como cualquier otro tipo, se crea por una o varias personas que toman un riesgo compartido, creando estructuras y planes donde construyen un ideal común, buscando oportunidades en las que están dispuestos adaptarse a los cambios, en donde tendrán constantes conflictos de interés, Vélez et al. (2008).

Según los autores Chua, Chrisman y Sharma (1999), una empresa familiar es única, ya que el patrón de la propiedad, la gobernanza, la gestión y la sucesión influyen de manera importante en las metas, estrategias de la firma, la estructura y la forma en que cada uno ha sido formulado, diseñado e implementado.

Se caracterizan por la concentración de la propiedad en manos de la familia, la implicación de ésta en la dirección del negocio, y por su intención de continuar trabajando dentro de ella, (Carrasco y Rubio, 2007; Gallo, 1993). Son claves también sus rasgos culturales, la internacionalización del negocio, su proceso de sucesión, y la transición fiscal de la empresa familiar, en los miembros de la familia que fundaron la compañía, o en los que fueron heredando el patrimonio y la gestión de la misma, ya sea de manera directa o indirecta Gallo (1993).

Estructura de las Empresas Familiares

La estructura que suelen adoptar las empresas familiares se complementa a través de la organización y la manera en que se distribuye la propiedad, se crea una cultura en la que se involucra a cada uno de los miembros que laboran en ella, Moreno (2006). La estructura hace referencia a los órganos de gobierno, jerarquías, políticas, procedimientos, estrategias, estructuras legales y demás elementos que

permiten alcanzar los resultados esperados, Gómez, Betancourt, y Zapata (2012). Por otra parte Basco (2006), dice que la estructura de capital, la participación de la familia en la gestión de la empresa, la influencia en la planificación estratégica y el desarrollo cultural, hacen que la empresa permita retribuir el capital, y el riesgo en la toma de decisiones.

No se puede hablar de una estructura particular de la empresa familiar, cuando su cualidad esencial es la adaptabilidad a las condiciones cambiantes del mercado en que opera Leach, 1993; Edwards y Ram, 2006, citado por Navarro, Ramírez, Sánchez, y Vaca, (2008). No obstante, Tagiuri y Davis (1982) con su modelo de los 3 círculos muestran que la conformación de las empresas familiares puede variar de diferentes maneras a la hora de realizar sus actividades y se desglosa de la siguiente manera: a) está controlada por una familia, b) tener a dos miembros de la familia en tareas de gestión, c) tener empleados externos a la familia. Sin embargo, los miembros de la familia que trabajan en la empresa pueden tener tres roles simultáneos: familiares, propietarios (beneficios de las inversiones y la viabilidad) y gestores (funcionamiento de la empresa eficaz).

Figura1: Modelo de los 3 círculos



Fuente: Tagiuri y Davis (1982)

El círculo número 1 representa el rol de la Familia, mientras que el círculo número 2 pertenece a la propiedad, seguido del círculo número 3 el cual es comprendido por los directivos y trabajadores de la empresa. La interacción que existen entre estos tres círculos, puede crear una superposición de roles.

El gobierno y sucesión en las empresas familiares

Los órganos de gobierno deben adaptarse a las necesidades propias de la empresa familiar, que ayudarán a desarrollarse equilibradamente aportando a su

estructura organizacional, Martínez (2014). Así pues, los principales componentes de una estructura de gobierno familiar que se establecen dentro del Manual IFC de Gobierno de Empresas Familiares de la Corporación Financiera Internacional (2011) es primeramente crear una constituciones que resalten visión, misión y valores y posteriormente la creación de instituciones familiares que permita distintas formas y propósitos.

Para que el modelo de gobierno de una empresa familiar sea eficiente debe contemplar una estructura y descripción de responsabilidades; así como también es claro que hay que formar algunas políticas útiles para la incorporación de nuevos miembros a la empresa.

Cuando llega el momento de la sucesión, se ha de hacer hincapié en el aumento de la complejidad, Leandro (2012). La sucesión generacional se ha revelado como uno de los problemas críticos de la empresa familiar, en donde la permanencia del control debe formar parte de un núcleo familiar, Gobierno de España (2008). Esto origina tensión en los miembros de la familia, pues la resistencia del fundador para aceptar su retiro, puede resentirse fuertemente. Teixeira y Carvalha (2013), hacen referencia a ello, resaltando la necesidad de permanencia de la familia por al menos dos generaciones para que la empresa pueda ser considerada familiar.

3. Método y materiales

El primer paso consistió en integrar una definición considerando las diversas posturas y fuentes. Al ver las diferencias entre cada una de ellas (ver tabla 1), se tomaron los aspectos relevantes para formar un concepto general y más completo sobre la empresa familiar, que ayudó a deducir las dimensiones de estudio para la estructura de la conformación de la empresa.

Tabla 1. Definición de Empresa Familiar

Definición de variable							
	Renato Tagiuri y John Davis 1982	Gallo, Ariño, Máñez, Cappuyns (2004)	Dirección general de política de la pequeña y mediana empresa, Madrid (2008),	Confederación de empresarios de la Coruña (2008)	Braulio Vivas Moreno, (2006)	Handler, W. C. (1989).	Neubauer, F. Y Lank, A.G. (2003).

Empresa familiar	empresas familiares en las que dos o más miembros del conjunto de la familia influyen en su gestión mediante el ejercicio de vínculos de parentesco, roles en la dirección o derechos de propiedad.	Una característica de la empresa familiar es el factor de tener la familia en la toma de decisiones en la empresa, otro aspecto es el hecho de la actuación responsable en sus roles dentro de la empresa. Otra característica es que al menos es la segunda generación de familia involucrada en la empresa.	Empresa es familiar cuando una parte esencial de su propiedad está en manos de una o varias familias, cuyos miembros intervienen de forma decisiva en la administración y dirección del negocio. Existe, por tanto, una estrecha relación entre propiedad y gestión o, dicho de otro modo, entre la vida de la empresa y la vida de la familia.	Es el hecho que la propiedad esté en manos de una o varias familias, y que haya una influencia efectiva de esta/s familia/s en la evolución y desarrollo de la empresa y en la toma de las decisiones más importantes que se deban afrontar.	Es aquella en la que una parte significativa de la propiedad es de un colectivo de socios unidos por vínculos familiares.	Una organización en la cual las principales decisiones operativas y los planes para la sucesión del liderazgo están influenciados por los miembros de la familia que forman parte del equipo de gestión o del consejo de administración.	Aquella empresa, sea unipersonal o sociedad mercantil de cualquier tipo en la que el control de los votos está en manos de una familia determinada.
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Fuente: Elaboración propia con base en autores.

Una vez tomada la idea de lo que una empresa familiar significa, se optó por definir los aspectos que las conforman como la propiedad, la estructura y sucesión, que se adecuaron a un cuadro en donde se le define a grandes rasgos a cada una de ellas. Después de analizar lo anterior, se desglosaron indicadores generados de un análisis sobre la empresa familiar, misma que sirvió para obtener una mejor comprensión sobre la relación que existe entre los miembros de la familia con la empresa y sus trabajadores (Ver tabla 2).

Tabla 2.- Variable, dimensión e indicadores

VARIABLE:	DIMENSIÓN:	INDICADOR:
<p>Empresa familiar Aquella en la que la familia, son los propietarios (ITZ, 1995) (Madrid, 2008) (Moreno, 2006) (Coruña, 2008) de la mayor parte de la empresa y dos o más integrantes (ITZ, 1995) (Madrid, 2008) y (Handler, W. C., 1989) de la primera desempeñan puestos en la organización (Tagiuri y Davis 1982,) (ITZ, 1995) (Handler, W. C., 1989) estando al menos uno involucrado en el gobierno o dirección (CHIJRCH, 1996) y (Madrid, 2008), preservando los valores y costumbres con los que opera.</p>	<p>Propiedad</p> <p>El derecho sobre una cosa, la posesión como derecho de usar y de abusar en el sentido de dominio absoluto sobre una cosa. Abusar de las cosas en cuanto autorice la ley o reglamento.</p>	Gestión y control concentrado dentro de una unidad familiar.
		Una parte importante de la propiedad intelectual y física de la empresa corresponde a un grupo pertenecientes a la misma familia.
		Uno o varios miembros de la misma familia dedican a la empresa gran parte significativa de su vida laboral a trabajar dentro de la organización.
		La concentración de la propiedad
		La distribución de la propiedad se basa en contribuciones o aportaciones que realizan los miembros de la familia.
		El gobierno dentro de la empresa está conformado por aquellos integrantes de la familia que controlan la mayor parte de la propiedad.
	<p>Sucesión</p> <p>Es un proceso de transferencia de la propiedad o gobierno de la empresa donde se identifica a los aspirantes, se analiza y selecciona al candidato, se le prepara, observa en sus acciones, comportamiento y se le comunica a la empresa que se está eligiendo al siguiente mando (Cabrera, 2008).</p>	Se debe de planear, organizar, coordinar y negociar
		El dueño o dueños deben desarrollar y entrenar a posibles sucesores y establecer un proceso para seleccionar al líder más adecuado.
		Permanencia de la familia por al menos dos generaciones
		Armonización de las relaciones empresa/familia.
		Preparación para la época de la jubilación del predecesor
	<p>Estructura</p> <p>Referida a los patrones de interacción de un sistema a todos los elementos que influyen en ellos: límites, jerarquía, centralidad, periferia, alianzas y coaliciones (Reyna, 2013)</p>	La familia influye en la gestión de la empresa
		Número de integrantes de la familia
Constitución de la visión, misión, valores y políticas de acuerdo a la familia		
		Funciones a desempeñar de cada uno de los miembros de la familia en la empresa

Fuente: Elaboración propia con base en autores

De lo anterior, se elaboraron dos guías de entrevistas semiestructuradas de acuerdo a Bisquerra (2004). La primera, contiene preguntas referentes a aspectos generales de la empresa, la segunda fue enfocada a la dirección de la empresa en relación a su gobernanza y propiedad, sucesión; además de la forma en que trabajan los miembros de la familia que se encuentran involucrados en la empresa, ayudando de esa forma a conocer la estructura familiar en ella.

Una vez definido lo anterior, se inició la búsqueda de una empresa que cumpliera con las características que relacionan a la familia y a la empresa al trabajar en conjunto, además de ser una empresa que realiza actividades relacionadas con el sector turístico de la región. Por lo que la empresa restaurantera Martín's Grill, fue seleccionada por ser una empresa familiar que se dedica a la prestación de servicios de alimentos y bebidas en Cd. Obregón, Sonora; México.

En la empresa seleccionada como el estudio de caso, se entrevistaron a la totalidad de los familiares que tienen relación en ella, así como a dos trabajadores sin relación familiar. Fue indispensable la utilización de una grabadora de audio, que ayudara a obtener detalladamente cada una de las respuestas de las personas entrevistadas, además de las hojas en físico que contuvieran cada una de las preguntas de las guías de las cuales se apoyarían para hacer anotaciones y observaciones de las diferentes sesiones con las personas entrevistadas. De lo recabado se da cuenta en la siguiente sección de resultados.

4. Resultados

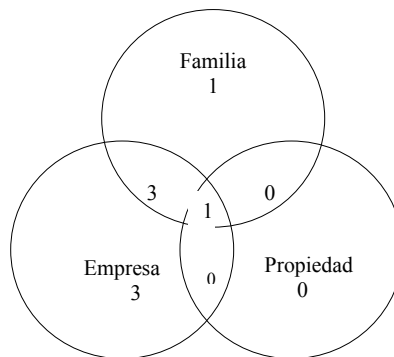
La empresa "Martín's Grill", es una empresa familiar que se encuentra ubicada en Cd. Obregón, Sonora; México. La familia Rosales Martínez Se compone por cinco miembros, de los cuales cuatro de ellos participan en la empresa. Ellos son: los dos padres de familia y sus dos hijos menores; la hija mayor ya contaba con su vida profesional antes de que surgiera la idea del negocio, por lo que ella no se involucra en la gestión, ni en la toma de decisiones de la empresa. El nombre de la empresa, se debe al nombre de uno de los hijos de la familia, además de que era un nombre pequeño, que contaba con los requisitos y la imagen del restaurante.

La empresa se creó en el año 2010, gracias a la idea de negocio entre los dos hermanos menores al mostrar deseos por construir algo que ellos mismos pudieran administrar. Surgió la intención de un restaurante, debido a que ellos estuvieron trabajando por seis años en Estados Unidos, en donde observaron y aprendieron el manejo de los servicios restauraneros. El capital inicial fue aportado por ambos hijos y posteriormente los padres contribuyeron económicamente con el negocio. A su vez, el restaurante cuenta con tres trabajadores que no son miembros de la familia por lo que no les corresponde ninguna parte de la propiedad, pues solo realizan actividades para la producción y prestación de servicio al cliente. Su actividad es en distintas áreas de la empresa. Uno de ellos es ayudante de cocina, otra es mesera y

una más esta como bar tender; para ello, la empresa procura que los trabajadores al ser contratados, cumplan con un perfil especial, el cual sea ocupado por estudiantes y egresados que puedan laborar en relación a su área profesional, ya sea de cocina, servicio y atención a clientes.

La conformación de la empresa familiar que se describe a continuación, está basada en el modelo de los tres círculos de Davis y Tagiuri, que corresponde a la superposición de los tres roles que conforman la estructura de una empresa, en relación a la propiedad, la empresa y la familia. Por lo mencionado anteriormente, la conformación total de los miembros de la familia en la empresa restaurantera son cuatro; solo que el padre de familia, la madre y el hijo menor son quienes están al 100% a cargo dentro de la empresa, pues uno de ellos se encuentra fuera del país. Para finalizar el análisis sobre la estructura de la empresa, se encontró que la única persona que se encuentra involucrada como se muestra en el modelo de los tres círculos en la propiedad, familia y empresa es el padre de familia, pues está actualmente relacionado en todas las áreas de la empresa, desempeñando distintos roles sobre ella.

Figura 2 Conformación de la Empresa Familiar Martin' s Grill, según el modelo de los 3 círculos de Tagiuri y Davis



Fuente: Elaboración propia con base en Tagiuri y Davis.

Propiedad

La propiedad de la empresa restaurantera Martin' s Grill, tiene como derecho físico sobre la posesión de un local en renta, donde toda la documentación del negocio estaban inicialmente a nombre del hijo menor, quien es el que se encuentra al frente del negocio la mayor parte del tiempo. Sin embargo, decidieron cambiar el nombre de la documentación legal, a nombre del padre de familia, por estrategia fiscal en el presente año, esto debido a los cambios que se generaron en el nuevo gobierno.

La distribución del dinero se divide entre la empresa y los tres miembros de la familia que se encuentran dentro del restaurante, que son los dos padres de familia y el hijo menor. Sin embargo, la gran parte de las ganancias las absorbe la empresa y lo demás se distribuyen por igual entre los tres miembros de la familia que dirigen a la empresa, pues el hijo que se encuentra en Estados Unidos, realmente no recibe ganancias de ellas y solo las aporta para ayudar a la empresa familiar. La concentración de la propiedad de la empresa restaurantera Martin's Grill, suele ser muy equitativa entre cada uno de los miembros de la familia, por lo que la distribución de las ganancias, no genera ningún problema entre ellos.

Gestión-Estructura

El gobierno que se maneja entre los miembros de la familia que se encuentran involucrados en la gestión de la empresa, son los padres de familia y el hijo menor, pues toman las decisiones de la empresa en conjunto, y su forma de liderar hacia los empleados que no son miembros de la familia, es igual en cada uno de ellos.

La manera en que estos miembros de la familia trabajan, suele ser un poco confusa para quienes no los conocen aún, pues algunos empleados, piensan que la persona que da las ordenes en la empresa es la madre de familia, pues para ellos es quien puede resolver los problemas hacia ellos, pero mencionan que ante una situación complicada, quien está al frente es el padre de familia; sin embargo la realidad de las cosas, es que ellos siempre trabajan en conjunto, y ante cualquier situación, están unidos para afrontarlas.

La empresa, al transcurrir sus cuatro años, cuenta con buena organización administrativa, pues gran parte de ello se debe a la unión, y comunicación que reflejan como familia, pues eso hace que la empresa permanezca estable y siga en constante crecimiento. No obstante, es difícil definir quién es el jefe de la empresa. Todos dan órdenes dentro de ella y por esa situación puede ser algo confuso; es por ello que los miembros de la familia siempre procuran encargarse de todo lo que pueden en la empresa, para abarcar distintas funciones, donde puedan ayudar en cualquier cosa que se requiera.

Las funciones administrativas y operativas de la empresa, son manejadas por los mismos miembros de la familia, en donde el padre es el responsable de la mercadotecnia y ventas del restaurante, la mamá hace el manejo del dinero en caja y el hijo menor se encarga de la preparación de platillos, bebidas, capacitación de empleados, además de las cuestiones técnicas del local. Todas las funciones ya mencionadas de cada uno de ellos por lo general suelen ser manejadas así, pero la prestación del servicio y la atención a sus clientes lo hacen junto con los demás empleados.

Sucesión

En un futuro, la empresa Martin's Grill desea que la empresa trascienda en manos de la misma familia, donde la toma de decisiones, la continuarán desarrollando los dos hijos menores, ya que ésta empresa fue creada para el futuro de ellos y su familia. Por otra parte, el hijo menor, no cuenta con un plan de sucesión, pues ellos tratan de manejar la situación de su empresa al día, sin embargo, es claro que cuando llegue el momento de trascender su parte, el procurará que la empresa se mantenga dentro de los miembros de su familia, de acuerdo a lo que ellos mismos expresaron.

Discusión

Por los resultados generados, fue claro que la conformación de la empresa restaurantera se encuentra estable al ser gestionada por los miembros de la familia, pues ellos realizan la mayoría de las actividades en conjunto, designando roles equitativamente hacia cada uno de ellos.

Ninguno de los miembros de la familia, ha discutido por la propiedad pues la familia tiene bien claro la idea de su crecimiento y la trascendencia que desean para su negocio, pues siempre han dejado en claro que es para el futuro de sus hijos, y que por ello pasará a ser únicamente de ellos y sus familias. Tampoco ha existido inconformidad por la dirección de la empresa, pues relativamente los tres familiares involucrados en la empresa tienen poder de delegar ordenes por igual; en cuanto a sus ganancias, estas son repartidas entre sí, sin ningún problema, pues a pesar de que el hijo de en medio aportó capital para la empresa, este no tiene problemas con ellos, pues no exige nada para él, ya que lo hizo con el fin de que las ganancias se quedaran dentro de su familia.

Dentro de las definiciones estipuladas en el apéndice 2, se puede definir que la empresa Martin's Grill cumple con varias características que representan a una empresa familiar, en donde los autores Tagiuri y Davis (1982), coincidieron con ella, al mencionar que dos o más miembros de la familia influyen en la gestión de la empresa, y tienen roles de dirección o derechos de propiedad con vínculos de parentesco.

Sin embargo, ellos no fueron los únicos que llegaron a ese análisis, pues los autores Itz (1995), Gallo (2004), junto con la confederación de Empresarios de la Coruña (2008) coincidieron que la propiedad debe estar en manos de los miembros de la familia junto con la gestión, tomando decisiones operativas como lo mencionó Handler (1989).

Su gobernanza fue otro aspecto importante, relacionado al tema de la propiedad, ya que esta pertenece a las personas que han aportado gran parte de ella y se involucran constantemente en todo lo que sucede dentro de la empresa, sin embargo la mamá actualmente tiene gran poder en su palabra por lo que sus

trabajadores concluyeron que su palabra tiene gran poder y una autoridad respetable dentro la empresa.

5. Conclusión

Con base en los resultados se puede afirmar que la empresa suele desenvolverse de una manera equitativa y organizada entre los tres miembros de la familia que laboran dentro de ella, pues ninguno de ellos persigue obtener más ganancias que otros, al estar conscientes de que estas son para la misma empresa, y serán repartidas en parte iguales para el beneficio de ellos mismos. Los dos miembros de la familia restantes, aun cuando uno de ellos participó con capital inicial, no intervienen en la propiedad, en las decisiones, ni una ninguna situación relacionada con la organización.

Existe un aspecto primordial. La propiedad de la empresa la ostenta solo quien es parte de la familia, que participa directamente y se involucra en mayor medida. En este caso, es el padre de familia quien puede considerarse el propietario en su totalidad, aun cuando el resto recibe los beneficios como si todos tuviesen derecho sobre el negocio. Lo anterior, es una característica peculiar que no es común en otra empresa que no tenga el carácter de familiar.

Lo anterior, podría ser un motivo de generar incertidumbre en el resto de los miembros no familiares, por no tener claridad de la cadena de mando o no visualizar a un responsable. La propiedad en este caso personalizada en el padre de familia, no corresponde con la imagen de quien coordina las actividades, ya que en este caso se ubica a la madre de familia. No, obstante, todos ellos saben perseguir sus objetivos de manera conjunta, llevando una comunicación constante.

Finalmente, al ser un negocio con poco tiempo de vida no es aún un tema primordial lo relativo a sucesión, sin embargo, es necesario para cada empresa que desea trascender, contemplar un plan de sucesión, que permita transmitir el negocio a futuras generaciones, así como una organización adecuada en su estructura, así como claridad con respecto a la propiedad, con el fin de hacer trascender el negocio en manos de la misma familia en un futuro prometedor. Lo cual se visualiza que dicho proceso se dará de padres al hijo menor que actualmente junto con ellos trabaja en la empresa.

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Is Management of Aging Human Resources Worthwhile? Evaluation of an Age Management Model

Abstract: Societies are aging. This brings with it a lot of negative consequences and risks to companies. Employers are facing a phenomenon which is not fully recognized, and as a corollary there are no fully developed standards and tools for age management as an implemented strategy and personnel policy. Older workers have different needs and expectations regarding not only working conditions, ergonomics, safety, health care etc., but also with respect to social relationships, communication, career perspectives, professional training and development. These factors, as well as the results of research on aging, should be reflected in the practice of human resource management. The purpose of this article is to show the LIKE Age Management Model (LAMM) in the context of suggested practices and models to date. LAMM contains two types of functions: primary ones regarding recruitment, learning and development, health protection and promotion, exit and transitions to retirement procedures; and supporting ones related

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with flexible working hours, career development, redeployment and comprehensive approaches. The model has been evaluated on the basis of diverse criteria in the context of the proposed instruments described in the LAMM with respect to functions and possibilities of implementation in enterprises.

Key words: Age Management, Age Management Model, Ageing, Human Resource Management, Evaluation

Introduction

The ageing of societies is an objective phenomenon of the social environment of organizations. Contemporary companies will soon face, or may already have to cope with, the problems of a labour shortage and knowledge drain – the result of the retirement of older employees. It is estimated in 2060 manpower will decrease in Europe from 307 million to 265 million, and in Poland from 25 million to 16 million.** During this same time the ageing population will increase 2.5 times.*** In the Polish case it may be predicted that in each decade the number of working people will decrease by 2 million. This means that even as the general population in Europe will increase up to 517 million, compared with 502 million in 2010, the population will be much older – 30% of Europeans will be 65 years old or older. This means that the percentage of people aged 15-64 will decrease from 67% down to 56%. For each pensioner there will be two employees. On the other hand there are prognoses that the available number of workplaces will increase by 1.5 million in upcoming years.****

The answer to these challenges lies in age management. There are many projects and a lot of ongoing interdisciplinary research on various aspects of age management. In order to help employers to better understand the concept of age management, the project LIKE (*Learning through Innovative management concepts to ensure transfer of Knowledge of Elderly people*) has been designed and evaluated. This project developed a model which contributed to an increase in the competitiveness of companies and improvement in their services, and at the same time facilitated the career development of older employees by helping them use their potential to the fullest.

The aim of this article is to present the results of the evaluation of the age management model in two organizations, against the background of theoretical considerations. In order to achieve our objective we used elements of the following methodologies: content analysis, case studies, analysis of the age structure, and group interviews. The structure of the article is focused on the presentation of

** http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=proj_10c2150p&lang=en

*** http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=proj_10c2150p&lang=en

**** <http://www.mrjob.pl/aktualnosci/nawet-21-miliona-nowych-miejsc-pracy-magwarantowac-unijny-plan-inwestycyjny/>

age management terminology, dimensions of human resources ageing, and models of age management. One of the presented models which was the subject of our evaluation process is the LAMM. At the end of the article we present our general conclusions and recommendations for the practice.

Age Management Terminology

Further research and the implementation of projects, as well as the analysis of best practices, leads on one hand to the multiplication of theoretical and empirical achievements, and on the other hand to standardized terminology and a more uniform understanding of age. This implies the presence of the variety and number of approaches. According to one, “aging human resources will demand a different approach and new solutions for the model of human resources management, starting from planning procedures, recruitment, training and ending with the termination of employees. It requires changes in health policy and employment solutions to support aging workers due to their potential and effectiveness. However the most challenging change must appear in personnel policy, organizational culture, and employers’ attitudes.” [Soltys, 2014]. Another approach shows that age is a way of managing human resource management, taking into account the aging of those resources. It also includes a variety of approaches adapted to mature workers’ activities related to the organization of work and employment, recruitment, training and knowledge management, software development, balancing work and private life, and creating sustainable jobs [Kołodziejczyk-Olczak, 2014]. The conclusion is that age management can be understood in various ways. According to Naegele and Walker, age management tools overcome age barriers and/or promote age diversity, helping us to create an environment where individual workers are able to fulfil their potential without finding themselves in an unfavourable situation because of their age [Naegele, Walker, 2006, p.3]. Age management can be related to different dimensions of human resources management in an organisation, with a clear focus on ageing [Walker, 1997] and, more generally, on the management of an ageing workforce through public policy or collective bargaining [Walker, 2005, p.685]. The latter perspective approaches age management in a relatively broad way.

It is also emphasized that the concept of age management was developed in order to describe the wealth of practices, interventions, and strategies designed for this purpose, as follows:

- Age management can be implemented at different levels – the individual, the company or the labour market;
- Age management requires a multidisciplinary approach drawing from demography, pedagogy and andragogy, health care, occupational health and safety, work projection, ergonomics, career planning and many other disciplines;
- Age management focuses on the entire professional career, not only on older workers [TAEN, 2007, p.5].

The study's authors understand age management as an integrated construct, corresponding to both economic and social needs.

Dimensions of Human Resources Ageing

Many contemporary organizations claim to have problems regarding staff competences and attitudes. The most important are lack of experience, lack of technical, formal, and professional skills and competences, lack of suitable candidates to work or lack of business knowledge ****. These may be caused by changes in formal education systems and generational change in attitudes towards work and career. The solutions to these kind of global staff problems are the paths to ensure that employees have permanent trainings, career progress, changes in recruitment strategies and concentration on retention of employees in deficit occupations *****.

Attention is directed to the age diversity of human resources, fixed as a base for the personnel management process – organizations which start from planning, recruitment and development procedures may have a trump, as it helps them to prevent:*****

- Decreasing effectiveness of work and professional potency of older workers;
- Decreasing effectiveness and motivation in other workers and a poor working atmosphere;
- Increasing labour costs thanks to internal trainings, inadequate recruitment and poor institutional memory;
- Increasing labour costs caused by absences, health benefits, contributions to the Labour Fund and the Guaranteed Employee Benefits Fund.

From the social and ethical perspective, the ageing of human resources may influence the processes of stereotyping, create negative discrimination, reduce the purchasing power of older consumers, and lead to social exclusion and a general reduction of social benefits. From the employer's perspective, the implementation of age management may have an influence on the employer's image and be a part of employer branding, as well as improve loyalty relations and in the end increase competitiveness, in accordance with the R. Cialdini rule – similarity – in relations with clients [Cialdini, 1996].

The first step in implementing an age management model should be an analysis of the age structure in the organization, which should be combined with an analysis of the organizational goals in the long-term perspective. This should include the characteristics of the clients, cooperators, and other social and business partners, as well the analysis of the strengths, weaknesses, opportunities and, what's more – the

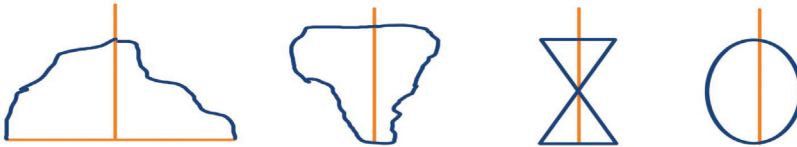
**** <http://www.hrnews.pl/reports>

***** http://www.hrnews.pl/reports/2011_Badanie_Niedobor_talentow.pdf

***** http://www.zysk50plus.pl/storage/fck/file/PUBLIKACJE/Zarzadzanie_wiekciem_miniporadnik.pdf

threats to an organization's development. L'Hoste, Grevedon propose [L'Hoste, Grevedon, in Czernecka, Woszczyk, 2013] the evaluation of evaluate age structure according to four ideal shapes: pyramid, mushroom, clepsydra, and oval.

Figure 1. Types of age pyramids in organizations



Source: L'Hoste, Grevedon, *Papy-boom et compétitivité. Les nouveaux enjeux de l'entreprise*, Éditions Liaisons, Paris. [in:] *Człowiek to inwestycja. Podręcznik do zarządzania wiekiem*, P. Woszczyk, M. Czernecka (ed.), Łódź 2013.

When we analyze the age structure, we have to answer some strategic questions regarding recruitment procedures as well development and motivation systems. There are also some questions which need to be answered:

1. Is there a greater fluctuation within younger or elderly workers?
2. Do the younger workers have enough professional knowledge and skills?
3. Is it easy to fluently replace retiring employees?

Each age structure requires different approaches for the strategic and personnel processes. If there is a predominance of employees in the age bracket 50+, there is a necessity to determine:

1. Are they ready to work longer than the formal required age of retirement?
2. Is the motivation system effective enough to encourage them to work longer?
3. Is the organization in danger of losing its know-how?
4. Are there methods providing for the transfer the know-how and experience between employees?

In the situation when the employment of employees 50+ dominates, it is also worth considering:

- In the case of permanent high growth, are there middle-aged employees and thus a large group of employees will be around the same age?
- How can organizations support ageing personnel, their health, and updated qualifications to ensure the same level of effectiveness and competitiveness?

From the perspective of social needs and the economic system, attention should be drawn to the fact that failure to implement age management or promote the employment of 50+ workers has the following negative influences:

- it increases the social and economic costs of living, caused by poor engagement in the productive and consumption processes;
- it increases the cost social security and the health and welfare system caused by lack of contributions;
- there is a weaker integration of social responsibility;
- it increases the necessity to employ foreigners, which may cause identity problems, adaptive problems and possible social conflicts.

At the beginning of the new century many European organizations had to face up to the problem of human resources' aging. In some countries a systematic approach has been implemented in the form of financial support for companies employing workers over 50 or for employees willing to work longer than the possible retirement age. Most of the solutions have been created as a form of motivating employees aged 50+ to work longer in situations of an increasing deficit of younger employees, lack of professional knowledge and qualifications caused by changing strategies of education and changes in the career perspective for the younger generation. The most popular practices include implementing flexible working hours, the possibility to receive salaries and pensions, lowering the cost of employment of 50+ workers, or providing better health care.

The Age Management Models

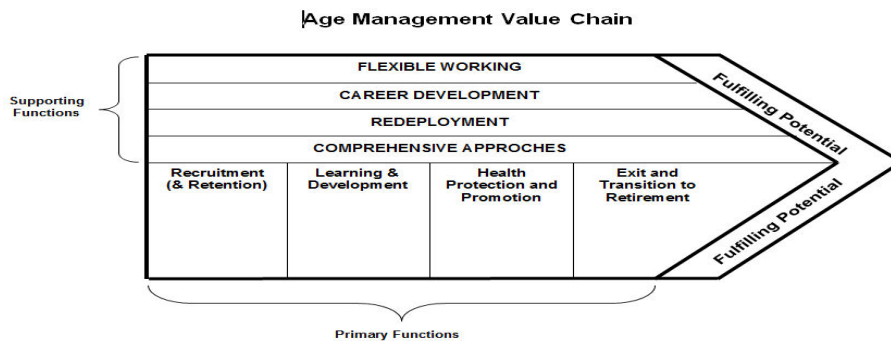
Within the aforementioned project LIKE, LAMM was developed. As a result of the adoption of this model and the implementation of the practices it contained, organizations have been able to increase the productivity of their older employees, sustain the competitiveness of a company, and what's more, to react to the demographic changes on a regular basis. It's worth mentioning the ways in which the concept of age management can be perceived. To begin with, the issue of age management, as the basis for increasing the possibilities for longer employment in an organisation, can be treated in either a broad or narrow fashion.

The model of age management developed for the purposes of the Project alludes to the "Value Chain" proposed by Porter, and juxtaposes it with the concepts of age management championed by Naegele and Walker [*Desining...*, 2013, p.14]. The model identifies Primary Functions which underpin good age management, using them as a starting point for any organization wishing to introduce age management policies. Specifically, these include: Recruitment and Retention; Learning and Development; Health Protection and Promotion; and Exit and Transition to Retirement.

In addition to the Primary Functions, Supporting Functions are also proposed, which reinforce good age management and complement the Primary ones.

These include, e.g.: Flexible Working; Career Development; Redeployment; and Comprehensive Approaches. Figure 2 below presents the Age Management Value Chain.

Figure 2. Age Management Value Chain



Source: project materials, adapted from Naegele and Walker, 2006

Supporting Functions are used to implement the Primary Functions, while the superior aim is to fulfil the potential of workers at different ages. The main instruments and solutions supporting age management regarding Primary Functions are:

- recruitment and retention: an employment policy preferential for 50+ applicants, removal of the age criterion from job advertisements, elimination of intermediary discrimination from the recruitment and selection processes
- learning and development: training methods adjusted to the needs of 50+ employees as working with a supervisor, working in a team, self-education, professional development plans for workers aged over 50, knowledge and experience transfer from 50+ employees to other workers, a mentoring system, a coaching system, an internal trainings system, work system in intergenerational teams
- health protection and promotion: regular analyses of the needs of 50+ employees concerning health, working time and responsibilities, analysis of workplaces and work tools in relation to the health needs of 50+ employees, activities related to preventive health care for employees as meetings with specialists – e.g. nutritionists, the organization of lectures on health, nutrition and disease symptoms, contact with a specialized doctor, promotion of sports – the organization of sports events, the provision of medical packages and health insurance for employees

- Exit and transition to retirement: maintaining contact with retired employees, part-time work, participation in events organized by the company, sending best wishes on name days, birthdays or other special days, an opportunity to benefit from the Social Benefits Fund, individual contact of former superiors and co-workers with current employees, a request to participate in consultations and to share their experiences, a request to fill-in at work for absent employees during the holiday period or in the event of an insufficient number of personnel, talks related to retirement plans and employment time, cooperation with trade unions on age management

As regards Supporting Functions, the following tools and solutions may be implemented:

- Comprehensive approaches: a formal anti-discrimination policy, a regular analysis of the age structure, regular training courses for employees concerning equal opportunity policies, regular training courses for the managerial staff concerning an equal opportunity policy, appropriate review procedures available for the workers experiencing discrimination
- Career development: individual talks related to professional development
- Flexible working: professional development plans for workers aged 50+, which take into consideration the need for professional development, the need for the development of social skills, the need for advancement, the need for job position change, the need for a change in the scope of responsibilities – resignation from specific activities and tasks, the need for working time changes – a flexible working time schedule, activities aimed at adjusting the work place to the needs of 50+ persons (connected with ergonomics, facilitating machine operation, a proper sitting posture, etc.), such as a change of furniture – desks, chairs, work tools, computers, lighting, and reorganization of the work place
- Redeployment: individual discussions related to the employment period.

The efficiency of the age management model depends on external and formal factors related to cooperation with the company, and on internal factors related to a specific company, its business activities and the solutions it has adopted so far.

There are both some similarities and some differences between LAMM and another age management models. A group of experts from Finnish Institute of Occupational Health defined the following eight general aspects of age management, which logically affect one another:

- Good knowledge about age structures
- Fair attitudes towards age
- Good management that understands individuality and diversity
- A good and operational age strategy
- Good work abilities, motivation, and the will to continue to work
- High level of competence

- Good work organization and environment
- Good life [Ilmarinen, 2005, p.236], which can significantly influence the process of implementation of the age management model. This is why the extent to which a company is prepared to implement changes enabling pro-active age management should be taken into consideration.

Another model, also Ilmarinen's, is called the "Work Ability House Model" and describes the different dimensions affecting human ability. The author believes that ability is the right balance between work and individual resources e.g. preferences (values, attitudes and motivation), competences, health, and functional capacities. Besides the workplace, the family and close community also influence the balance. Aspects connected with society include: culture, legislation, education policy, social and health policy. The working environment is also important. The operational environment of organisations tends to change continuously due to globalisation, new technology, financial crises, etc. As a consequence, the work to be done in an organisation is subject to continuous development. Simultaneously, the organisation's human resources change, due for example to the ageing of the workforce (Ilmarinen, 2008).

The model developed by I. Kołodziejczyk-Olczak includes both employer-friendly practices and employee-friendly practices. At the centre of the model is a set of selected age management practices, which are distributed along a line dividing the multi-faceted benefits obtained by the employees and the organization's benefits. It is noteworthy that the key age management practices are equally beneficial for both parties, and include:

- management of competencies, including knowledge;
- motivation for work, commitment, well-being,
- training courses and development
- Work-Life Balance.

Practices more favourable to the employer include: diversity and generation management, flexibility, Employer Branding and monitoring the effects of the use of age management. Practices in which the greater beneficiary is employee are related to the health and healthcare (Kołodziejczyk-Olczak, 2014). It is important to note that organization strategy, its HR philosophy, organizational culture and its structure has significant effects on age management. Due to this fact, the process of evaluation of the age management model should be closely related to a company's strategy and its personnel policy so that all the key moments of implementation, their consequences, and the generated changes can be defined.

Evaluation of LAMM – assumptions and results

The general aim of our evaluation of LAMM was to indicate whether the proposed solutions could be implemented in organizational practice, and under

which conditions. The model was evaluated in two Polish companies in 2014, selected based on their experience in dealing with the aging of human resources. It was a deliberate choice. The case analyses were used to present the specifics of the companies. The analysis of the age structure constituted the base for which to expose the depth of the aging problems and their impact on companies related to short-term and long-term activities and development. The specific instruments of LAMM were also the subject of evaluation in employee group interviews, based on an author's questionnaire.

For the purpose of the evaluation, the following criteria were adopted: timeliness, costs, the need for external help and support, current and future needs of the companies – examining individual approaches of both managers and workers.

Thus, in this preliminary stage the following questions had to be answered to form a foundation for the evaluation:

1. What companies could be interested in the model's implementation?
2. How should a company prepare for changes in the scope of human resources management?
3. What changes should be implemented within the scope of functioning policies, procedures and tools?
4. How should the staff be prepared for the changes?
5. What positive changes can be expected in the employment relations?
6. What negative changes can appear in an organization?
7. How did the personal situations of the 50+ workers change?
8. How did the company's situation regarding competitiveness and effectiveness change?
9. Which of the suggested activities are the most useful for employers?

The general conclusions and answers are presented in a SWOT analysis and in conclusions in the further part of this article. The second part of the evaluation was related to the question which of the instruments and tools of LAMM were beneficial both for the company and the workers, and, at the same time, did not generate losses, increase costs or decrease individual efficiency or the efficiency of the company. In the final considerations references to the European Commission criteria of the evaluation were taken into account.

The Companies' characteristics

The model evaluation process took place in two organizations from Lodz. Their characteristics are presented in Table 1.

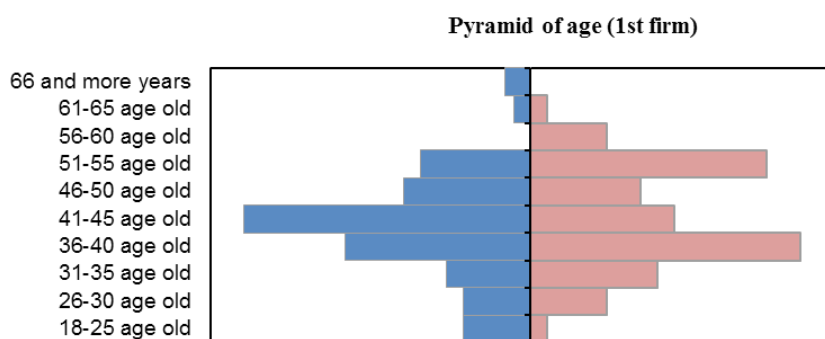
Table 1. Characteristics of the organization

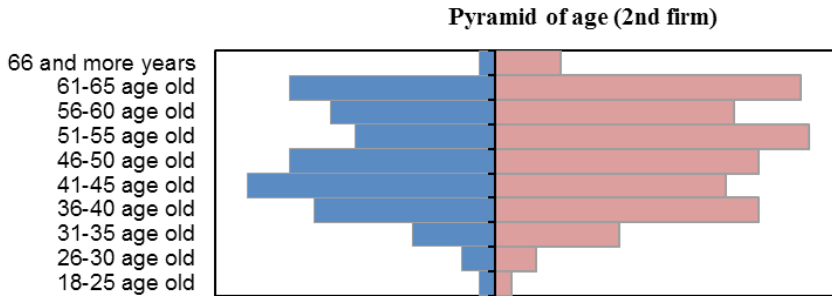
Organisation 1	Organisation 2
<p>This organization has been operating since 1992. It has been offering a range of supporting services to companies and institutions all over Poland. The company has sufficient knowledge and experience, as well as the necessary potential to properly perform the services they offer. The organisation specializes in:</p> <ul style="list-style-type: none"> Cleaning services Technical maintenance Security services Temporary employment. <p>This is a team of 6,700 people providing services in 4,500 different facilities all over Poland, inside and outside buildings, with a total area of ca. 1,100,000 sq.m. The organisation hires 1,000 temporary employees who work in their partners' teams. It has the status of a Supported Employment Enterprise.</p>	<p>This organisation was founded in 1973. It consists of 10 outpatient clinics which provide services to 60,000 people from the Polesie district.</p> <p>The organisation owns several specialist clinics: surgery, orthopaedics, gynaecology, urology, laryngology, ophthalmology, rehabilitation, dentistry, a laboratory and an imaging unit. It also runs 50 offices located in schools, which provide nursing care for children. The health care centre has its own sanitary transport services. Doctors, nurses, and technicians have the high skills and competences that are required for independent decision-making. The key values of the system are connected with the level of experience of the personnel and stability of employment in all of the clinics.</p>

Source: own compilation

In the first stage we examined the age structure of the employees of both companies. The results of these analyses are presented in Figure 3 below.

Figure 3





Source: own compilation

The structure of the second organization corresponds almost exactly to the “mushroom” type. This is a very disturbing result. In both organizations it is necessary to take steps towards the long-term rejuvenation of the staff.

The LIKE Age Management Model Evaluation Results

Assumptions of the LIKE project evaluation (all studies, interviews, workshops) showed risks and opportunities, and the strong and weak points of the concept, since it took into consideration not only the organizational perspective (costs, the possibility to adopt selected age management elements), but also the wider context (the high unemployment rate among young people, which could negatively influence the employers’ attitude toward hiring older workers).

Research has shown that many of the instruments can be applied to an organization with only a small financial outlay. This refers mainly to the “soft” tools. They require conceptual work and implementation, but you can build on the experiences of employees, adjusted and supplemented by new knowledge specific to older workers.

Only the following areas require, in the opinion of the organizations, external support:

- Age discrimination (in the context of this problem: appropriate review procedures available for workers experiencing discrimination, contact with one’s superior, contact with the person acting as an “intermediary”, contact with an employment specialist, an internal help line, contact with an external specialist, contact with an attorney-at-law);
- Training methods adjusted to the needs of 50+ employees (achieved mainly by work with a supervisor, work in a team, self-education);
- Activities related to preventive health care for employees (meetings with specialists – e.g. nutritionists, organization of lectures on health, nutrition and disease symptoms, contact with a specialized doctor, promotion of sports – the organization of sporting events).

Respondents were surprised by the multitude of possibilities of change, provided that their necessity was realized by the company. The conducted research allowed for the creation of a SWOT analysis, presented below.

Table 2. SWOT analysis of the age management concept

STRONG POINTS	WEAK POINTS
<ul style="list-style-type: none"> - most of the tools can be implemented quickly, without great expenditure - an activity once started can be continued on a regular basis - it can be an element of the incentive scheme for employees - it can be used for brand building - it is possible to implement only selected elements of the model - it covers all the areas of age management (sub-functions) 	<ul style="list-style-type: none"> - some of the activities can only be introduced with external help - the development and implementation of other AM practices require greater expenditures - most of the solutions require an ongoing structural approach, which entails changes in the personnel policy and tools - trained managerial staff who would be aware of the problem is required
OPPORTUNITIES	RISKS
<ul style="list-style-type: none"> - the growing awareness of employees' rights and needs in organizations (especially in Europe and well-developed countries) - employees signalling their needs - an opportunity for the employer to enhance their good name - the managerial staff not only learns to understand the problem - of ageing, but also develops a general pro-employee attitude - the promotion of the model, and a gradual development of age awareness among all interested parties 	<ul style="list-style-type: none"> - the high level of unemployment among young people - the lack of a structural approach in the employment policy - the company and its employees need a special work environment, which makes it impossible to implement some of the solutions - the model includes some sub-functions whose implementation entails significant expenditures

Source: own elaboration

Taking into consideration all the activities and evaluation areas, one can put forward the following conclusions:

- Compatibility with expectations – the presented model covered many of the employment-related needs mentioned by workers aged 50+ in group interviews.
- Taking into account the number of problems – from the point of view of workers aged 50+ - the presented LAMM was very comprehensive. It covered employment, development, health and social needs; nevertheless, it did not take into consideration cultural standards and values, which constituted the source of problems, or possible solutions related to stereotypes, employment relations, and the employer's responsibility.
- Increase/decrease in costs – the potential implementation of the age management

model did not entail great expenditures, but it required many organizational changes, which included expanding the duties of the managerial staff and HR officers - they were made responsible for talks with the older workers concerning further employment, planning retirement, planning professional development, and changes in the scope of responsibilities. The costs were mostly related to the adjustment of the work place and the scope of duties to the needs of employees aged 50+, to the support of external entities in the area of training, to additional benefits, and to activities promoting health.

- Implementation time – While the implementation of the model did not take long, nevertheless it was based on a regular, continuous implementation of certain solutions – regular assessment procedures of skills and needs, development plans, in-service training, and health promotion.
- Legal outcomes and consequences – all solutions suggested in the model were in accordance with the labour law in effect.
- Financial outcomes and consequences – the implementation of the model did not bring any direct financial benefits; they could be achieved only if older, experienced employees would decide to continue their work for the company. In an indirect way however, the model ought to lower the costs of sick leaves and eliminate the need to hire new, inexperienced workers. The direct expenditures were related to the adaptation of work places and work tools for 50+ employees.
- Social outcomes and consequences – the solutions suggested in the model focused on improving the relations between employees and employers, as well as between employees themselves, and on introducing an atmosphere of mutual acceptance, understanding, and (indirectly) loyalty; in the long-term perspective, they could enhance the good name of the company.
- The number of implemented changes and their scope – the model not only suggested and assessed many solutions, with the advantage that they could be used in a comprehensive and structured way, but it also responded to the individual needs of both employees and employers.
- The majority of solutions presented in LAMM will have a significant influence on the improvement of employees' satisfaction and qualifications. However, one needs to keep in mind that the implementation of the proposed strategic solutions will only bring results in the long run. These results cannot be observed immediately [Sołtys, Kołodziejczyk-Olczak, 2014].

As a result of presentation of the LAMM to both companies and the assessment of the solutions that were introduced, the representatives of the companies decided to take certain steps which would allow for a more deliberate age management. The distribution of their preferences is presented below.

First of all, it has to be pointed out that evaluation is a necessary stage of management. Each planned and subsequently implemented activity requires feedback from the most important beneficiaries.

The evaluation of LAMM attempted to answer the following questions:

- **What kinds of companies could be interested in the model's implementation?** It seems that in this case, when the proposed model is so comprehensive and covers almost all aspects of HR policy, it can be implemented not only in organisations in which most employees are over 50 years old, but in any company.
- **How a should company be prepared for the changes in the area of human resources management?** Undoubtedly, the implementation of the model requires a comprehensive and systematic approach to the activities related to health promotion, the planning of employment and retirements, and the planning of career development. Such activities can be conducted by properly trained specialists from the HR department or the managerial staff prepared to perform HR tasks. The implementation of the model may also require improvement of a company's flexibility in terms of work organisation, distribution of tasks and responsibilities and the adaptation of the workplace.
- **What changes should be implemented in terms of present policies, procedures and tools?** If a company has not implemented a comprehensive HR policy yet, then changes in the decision-making and HR areas definitely need to be implemented, These include, e.g., regular interviews concerning their employees' careers, competence management, and the adjustment of training methods to age requirements.
- **How should the staff be prepared for the changes?** Most of all, the company needs to implement a formal non-discrimination policy and to instruct its employees about their rights and the company's activities aimed at the needs of 50+ employees. It is also recommended that the employees are prepared to use certain procedures.
- **What positive changes can be expected in the employment relations?** Increased awareness, enhancement of the good name of the employer, conscious responsibility towards employees, respect for a team of employees who are diverse in terms of age, and increased loyalty and motivation of the employees.
- **What negative changes can appear in an organisation?** Organisational changes aimed at the improvement of working conditions and the implementation of systemic solutions in HR policy will not entail any negative changes, such as large expenditure or organisational changes. Most solutions of the age management model can be implemented as part of the tasks of HR department specialists or by properly trained managerial staff responsible for the HR policy.
- **How has the personal situation of 50+ workers' changed?** One can observe an increased sense of being needed, a possibility of sharing knowledge within a mentoring system, increased motivation to work, the possibility of balancing private life with career, and improved health protection.

- **How has the company's situation regarding competitiveness and effectiveness changed?** The evaluation does not offer any direct answer to this question, as no research into this issue was conducted. However, it is assumed that changes in the position and responsibilities of 50+ employees do not exclude the possibility of assigning these responsibilities to other employees in places where work systems oriented towards quantitative results are used.
- **Which of the suggested activities are most useful for employees?** Here one may point out health protection, the possibility of modifying the scope of responsibilities, flexible working hours, striking a proper balance between private life and career, the possibility of professional development [Sołtys, Kołodziejczyk-Olczak, 2014].

Attention was focused on the fact that the concept is divided into several modules under which various tools are proposed. These solutions are a part of a personnel policy that emphasizes an individual approach towards workers and their needs, depending on their individual situation with respect to age, health and family. The main emphasis is placed on making the forms of employment and work organisation more flexible and on changing the attitudes towards personnel-related decisions.

While demonstrating the model, it was emphasised that the solutions presented in the model had been functioning in the companies for many years and they were an answer to the changing expectations of workers, which in times of a shortage of qualified staff, is the only rational approach towards employment. This means that in practice employers and managing staff can use verified activities and decision patterns and they do not necessarily need to implement all the solutions described in the previous project activities. What is important for employers is the fact that they can choose certain tools and suggestions and adapt them to their own specific needs.

In order to properly evaluate the proposed model, it is recommended that further research be conducted based on the solutions implemented and monitored on the basis of selected indicators, and that a two-stage evaluation is carried out. Such an evaluation would allow to assess the input, effects and the implementation method from the perspective of selected criteria which, pursuant to the recommendations of the European Commission, include: relevance, effectiveness, efficiency, impact and sustainability.

Figure 4. Fulfilment of selected criteria by the LIKE model

Criterion	Description	Criteria fulfilment by the LIKE model
Relevance (objectives vs needs)	This dimension concerns the structure of the model itself, its objectives and the possibility of their fulfilment via the conducted activities. It allows to assess the extent to which the objectives are consistent with the beneficiaries' requirements and whether the objectives correspond to the initial assumptions.	The model's structure and the selection of primary and supporting functions are correct.
Effectiveness (plan vs performance)	The effectiveness criterion allows us to assess the extent to which the set of objectives were achieved. It requires the preparation of a summary of the model's forecast and actual results. In the case of an analysis of the model's effectiveness, it is recommended that the connections between the structure of activities and their successes and failures - related to the planned effects - are indicated, i.e. expressed by indicators.	The objectives related to the pilot implementation have been achieved. The goal was a survey of attitudes and of the need for the implementation of age management solutions in accordance with the LIKE model in two companies.
Efficiency (input vs effects)	This involves an assessment of the ratio of effects to input and the determination of the effectiveness of the inputs in terms of results. It includes an analysis of how economically the inputs translated into individual results and the impact of the model on the company. In the context of the pilot implementation, the main task of the efficiency criterion is to assess the estimated costs of the broader implementation of the model.	In the case of internally financed projects (the EU resources in this particular case), it is very difficult to determine the efficiency of the pilot study. The piloting has proved that, according to employers, certain age management functions (for example, those related to ergonomics) require high expenditures. The project uses a low-cost approach, and the previously-described test solutions required an input of time and attention rather than a financial input.

Impact (effects vs needs)	This is the most important evaluation criterion of the model. This dimension focuses on the beneficiaries and their needs. The evaluator should determine to what extent the model responds to the target group's needs and solves the identified problems. The evaluator examines all consequences and the extent to which the product (model) has managed to solve the problems.	The evaluation has proved that the model responds to the target group's needs, and particularly to the needs of employers hiring mature and 50+ people.
Sustainability (the project's impact after its completion)	When public funds are used, sustainability is a very desirable element of the achieved effects. Sustainability should be assessed in the context of all the objectives and positive effects to beneficiaries and institutions which the programme was supposed to achieve.	The model developed within the project is sustainable. The relationships it presents can be developed in an operational or instrumental form. The model constitutes a good basis. The LIKE model's evaluation showed the beneficiaries how significant the problem of ageing human resources is to an organisation and offered them a tool which helped them to prevent negative effects and to seize opportunities. The model is a sustainable resource for other groups: consultancy and training institutions, academics and students.

Source: Own conclusions

The adopted practices can stimulate an increase of efficiency, competitiveness and employability, which was noted in the course of the pilot study. Participants underscored that their employers supported them in the development of those competences that were needed to perform their professional responsibilities. They had very few opportunities to change their job positions or scope of responsibilities. While the model covers this issue, such solutions were very rarely used in practice in the pilot companies. They adopted many solutions that were uncommon in other companies and were conscious of their shortcomings in the area of age management.

Conclusions

As we mentioned at the outset, human resources are ageing. That aspect cannot be ignored and globally organizations must face up to it by taking proper account of the varying demographic and social parameters of the populations affected [Mahon, Millar, 2014, p.564]. The analysis of the age management model has led to the conclusion that, as regards the problem of ageing human resources, a systematic and comprehensive approach is needed above all. The tools and solutions suggested in LAMM are usually not expensive, but they require changes in the personnel policy

and vision, implemented by specialized divisions or directly by the managerial staff. Hence the most important part of the concept is becoming aware of the various opportunities related to the implementation of the whole model, or only chosen elements. Our evaluation process led to the conclusion that the employees believed that most of the solutions were very attractive and not only to workers aged 50+, but also to other workers, despite the fact that both of the companies had a very employee-friendly attitude, good team atmosphere, and an individual approach to their workers and their needs. Other studies have shown that age management actions are made for a better and healthier workplace. Workplaces can support good health and promote healthy lifestyles, and healthy workers are more efficient and more productive, so adopting a holistic approach to health, mental health and well-being should be a management issue [Ahonen, 2012, p.3].

LAMM is a response to the needs and expectations of both main stakeholders – employers and employees. It is an efficient and an integrating approach with many dimensions, but the process of implementation is very important. The model can be recommended as a practical tool for strengthening the personnel policy of organisations.

We identify additional avenues for future research by drawing on data from other organizations, other sectors, markets or countries.

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Family Business to Improve Management Paradigm – Selected Cross-cultural Remarks

Abstract: Complexity and changeability of modern economic processes (especially in cross-cultural context) require enterprises to continuously improve their management processes. Family enterprises, which play an important role in economic growth of economies all over the world, constitute a group that is in especially susceptible to dynamism of changeability of the economic environment, because they mostly belong to the group of micro-, small and medium-sized enterprises. Improvement, which is becoming a key challenge for today's enterprises and constitutes a paradigm of modern management of an enterprise (also in cross-cultural management view), is especially visible in an analysis of this group of entities.

The aim of this paper is to confirm the thesis the characteristics distinguishing family firms from the others are determinants of improvement, which is a modern paradigm of management (also in cross-cultural context).

Key-words: family business, paradigm of management, improvement, management, paradigm of improvement, cross-cultural management

Introduction

Complexity and uncertainty which characterize the environment in which enterprises are functioning, force them to continuously improve and search for new, often unconventional solutions for shaping decision making processes. It refers both to organizational, technological and managerial solutions. In the situation of dynamically changing external and internal conditions of its functioning, an organization can survive and grow only when it is able to successfully adapt its changeability to the changeability of the environment in which it is operating

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[Penc 2002, s.51]. Important element on this view are cross-cultural elements. The sector of micro-, small and medium-sized enterprises is the group of entities that is especially exposed to the effects of changeability of the environment. On the one hand, such enterprises constitute a “driver” of numerous countries’ economies, on the other hand however, the scale of their resources, skills or possibilities of gaining access to capital [Okreglicka 2013, ss.74-84], information or innovation [Sipa 2013, ss. 119-128] is limiting the effectiveness of their actions to counteract threats [Gorzeń-Mitka 2013a, ss. 6-11]. Searching for ways to improve the activities of an organization, taking into account the existing constraints to its functioning (both internal and external ones) is becoming not only a challenge but even a paradigm of modern management [Gorzeń-Mitka 2013b, ss. 11-19]. The existing and applied systems of decision-making are often inadequate to the new challenges encountered by enterprises. This is stressed e.g. by D.Jamali [2005, ss.104-105] in his work *Changing management paradigms: implication for educational institutions*, who points out that improvement in this area is becoming a requirement that must be met by modern entities to be able to conduct business.

The aim of this paper is to point out that the specific features of family enterprises predispose them to fulfil the paradigm of management improvement (also in cross-cultural context) and they should be implanted also to the operation of other types of enterprises.

The scope of this discussion has been limited to identifying specific characteristics of family firms and explaining the main idea of the paradigm of management improvement. Against this background, the common features of the areas of family enterprise and paradigm of management improvement have been indicated as recommended for implementation in the practice of managing other types of enterprises.

As the paper functions as an illustration, the main method is overview of the literature of the subject in the selected scope of discussion. The paper has an element of novelty and originality in the fact that it points out that improvement, though “unnamed”, is a subject of scientific discussion with the rank of a paradigm, and relates it to the specific features of family firms.

Specificity of management in family businesses – overview of selected studies
Family enterprises are playing an important role in the economic growth of economies all over the world (they contribute to generation of 90% of global gross domestic product [FFI 2014]) and constitute a dominating form of organizations across the world (especially in developing countries). The percentage of registered companies which are controlled by families oscillates between 50% in the European Union and over 95% in the United States, with 65-90% in the Latin America [PwC 2008].

Family companies are usually defined as ones where a family exerts or has an effective control over the direction of the strategic development of the business,

which in turn generates welfare to the family, its income or identity [PARP 2012, Sulkowski Marjanski 2009]. This interpenetration of the spheres of family and business makes family enterprises a special type of organizations.

The issues of the functioning of family enterprises and the impact of family relationships on business are the subject of a wide range of analyses. We can distinguish two main types of such analyses:

- analyses referring to the functioning of an enterprise as such (e.g. competitiveness and its determinants, innovation, etc.) and
- analyses specific only to family enterprises (e.g. the issues of success, etc.).

An example of studies of the first type is discussion raised by N. Bloom and J. Van Reenen [2006] and presented in their work entitled: *Measuring and explaining management practices across firms and countries*. The authors analyzed the impact of a management model on an enterprise's competitiveness. In their work they pointed out, among other things, that companies where the chief executive officer (CEO) is chosen by *primo geniture* tend to be poorly managed. At the same time, they stressed that ownership concentration in a family company may have a positive impact on reduction of the *principal-agent* problems [Gorzeń-Mitka 2007, ss. 57-58]. They also indicated that family ownership combined with professional management (i.e. when the chairman is not a family member) has a positive impact on implementation of good managerial practices. These observations are confirmed in, among other things, studies by E. Claver, L. Riend and D. Quer [2009, ss.125-135].

An example of studies of the second type is discussion raised by E. Brenes, K. Madrigal and G. Molin in their work entitled: *Family business structure and succession: critical topics in Latin American experience* [Brenes i in 2006, ss. 372-374]. Dotyczą one dziedziczenia i kontroli kapitału, które to uznawane są za najważniejsze z czynników prowadzących do problemów w przedsiębiorstwach rodzinnych. It is about capital succession and control which are regarded as the most significant factors leading to problems in family enterprises. In the Polish studies, these issues were discussed in the report *Codes of values – effective succession in Polish family companies* [Lewandowska 2013], which indicated main problems in this area.

According analyzing cross-cultural context of this area we can find following reflection. According Mine Karataş-Özkan K. et al. [2011], the study of diversity and impact of culture in family business research remains largely uninformed by critical perspectives on diversity in organizations and cultural embeddedness of organizational activity, reflecting the broader functionalist and normative paradigms that have dominated the subject domain.

The literature review helps identify the key issues of cross-cultural management of family firms has attracted considerable attention to academics and practitioners.

Another area within the field of family business that has attracted considerable attention is the role of non-family members in managing family firms [Yildirim Öktem and Üsdiken 2009].

Management in a family enterprise is in some areas characterized by different features compared to other entities. Characteristic features of a family enterprise and the method of managing such an enterprise have been presented in table 1. The features have been grouped against variables characterizing other enterprises (i.e. ones that are not family companies) and cross-cultural view on management.

Table 1. Characteristic features of a family enterprise management - cross-cultural view

	Family enterprise	Other enterprises	Cross-cultural view
	Similarities		
Leading sector	MSME		
Company size	Similar		
Number of employees	Similar		
Activity area	Similar		
Volume of income	Similar		
Investments and development plans	Similar		
Perceptions of key barriers	Similar		
	Differences		
Average time functioning of the company	Long, generational (average 30 years)	Short (average 5-9 years)	+
Board company	Family Members	Other	+
Management delegation	Succession	Other	-
Business planning	Long-term, at least one generational	Short-term, elective, focusing on short-term projects	+
Financial management	Careful, responsible, focused on long-term perspective	Moderate, sometimes risky	N
Corporate reputation	Important, often fundamental	Moderate	-
Corporate value	Same among family members	Different, sometimes only declared	+
Organizational culture	Specific, Creating positive atmosphere in the work of all employees	No dominant type	+
Personnel recruitment	Preferred family - greater confidence	Determine factors other than family relationships (qualifications, experience, etc.)	N

Human Resource Management	Personalized relationships with employees (business or personal relationships); better recognition capabilities of workers, the possibility of individual adjustment to the workplace, higher efficiency	Business relationships	+
Requirements of employees	Increased requirements for family members	No preference	N
Communication method	Specific easier to express opinions, also negative	No dominant type	+
Decision-making	Quick, often do not require formal consultation with other members of the board (family)	Requiring formal consultation with owner or board	+
Risk management	Intuitive Use simple risk mitigation methods	Intuitive, often not conscious	+
Contact with customers	High flexibility and commitment	Result of the business model	+
Sensitivity of economic changes	Low Flexibility and quick adaptation to changing economic conditions	Significant	N
Responsibility for employees, the local community	High	Result of legal norms and practices	-

Legend: + favorable feature; - unfavorable feature; N - neutral feature.

Source: own study based on: PARP 2012; Bloom Van Reenen 2006; Sipa 2012, ss. 270-278; Gorzeń-Mitka 2013a, ss.6-11; Sulkowski 2010; Yildirim-Öktem Ö, Üsdiken B. 2009; Mine Karataş-Özkan et al. 2011.

Although in many areas the functioning of a family enterprise (including cross-cultural aspects) does not differ from the way business is conducted in other types of enterprises (see table 1: similarities), the specificity of connections between the family and business spheres has a significant impact on how family enterprises are managed (see table 1: differences). In further sections of the paper, the author will

attempt to relate the specificity of managing a family enterprise to the postulates of the paradigm of management improvement.

Improvement as a paradigm of managing a modern enterprise

In his book „The structure of scientific revolutions”, T. Kuhn defines the concept of paradigm as certain knowledge comprising scientific opinions, theories and methodologies of action that lead to acquiring knowledge that is certain [Kuhn 1970]. In „Aspekty złożoności i filozofii nauki w zarządzaniu” T. Gospodarek [2012, s.299] points out that paradigm is a certain scientific proposition; it may be both falsified and validated and constitutes certain knowledge with established high degree of acceptance. In particular, in management sciences knowledge building must be based on self-adaptable processes of improving the systems of paradigms and observation-based facts [Gospodarek 2012, s.308]. The process of discussion adopted by the author seems to meet this postulate. It should be stressed at this point that the growing gap between management theory and business practice that has emerged over the years led to the development of a new paradigm which should ensure constructional coherence of these areas. At the foundation of this paradigm, there are four aspects of present reality: customer needs, quality, systemic management, and innovations. As stressed by B. Słowiński changes in the paradigm are manifested in many aspects connected with the functioning of an enterprise: e.g. in the change of an enterprise’s organizational structure where we see a change from a functional (characteristic for the “classical” approach) structure to process-based or network structures which are characterized mainly by flexibility and adaptability to changes in the environment [Słowiński 2009, s.21].

Recently, we have been observing in academia a return to discussions on paradigms in management. Such discussions have been raised e.g. by W.M Grudzewski and I.K. Hejduk who postulate that the specific paradigm of modernity is sustainability [Grudzewski Hejduk 2011, s.102] and by Ł. Sulkowski who has presented different typologies of organization paradigms in his work entitled: Paradigms of management sciences [Sulkowski 2013, ss.17-26].

The issue of improvement [Tatarkiewicz 1976, Arystoteles 1996] with reference to management sciences has been present for a long time, and its understanding has evolved over the years. The changes concerned both the subject and methods of improvement [Gorzeń-Mitka 2013, s. 11-19]. Improvement, although it had been present in earlier discussions of researchers, was first stressed and presented by T.J. Peters and R.H. Waterman Jr. They suggested that perfect companies are those which have a long successful history and do some things in a systematic way that distinguishes them from other companies [Peters Waterman 1982, Peters Austin 1985]. They claim at the same time that „perfect companies are first of all brilliant at the fundamental level. Tools cannot substitute thinking [...] These

companies work hard so that things (solutions) remain simple in the complicated world. They preserve them. They rely on the highest quality. They observe (notice) their customers. They listen to their employees and treat them as adults”[Peters Waterman 1982, s.13].

Nowadays, hyper-competition and constant pressure on long-term increase in an enterprise’s value force enterprises to search for more and more effective solutions to continuously improve and enhance the existing processes. The process of changes (including cross-cultural changes) and improvement has become part of the day-to-day operation of an organization. The process of improvement should allow a company to eliminate existing problems, reduce its weaknesses and identify new areas of strengthening its competitive advantage. Thus, a perfect organization is one that continuously extends its capabilities and uses them to overcome challenges that appear, and is able to identify and exploit emerging opportunities and possibilities to gain a sustainable competitive advantage. It is an organization that is always prepared to recognize threats and minimize risk [Lisiecka 2006, s.301].

As J. Ejdyś points out, in management sciences the terms “perfection” and “improvement” are inseparably connected with the process of development of a given organization. However, while the need for changes as such seems to be indisputable, how these changes will be introduced is a question of choice [Ejdyś 2011, s.105].

The concept of continuous improvement is applied in many tools and organizational solutions, and is used with reference to various areas of an enterprise’s activity such as: manufacturing of products, processes and relations between them, organizational structures, management systems, human aspects and culture, infrastructure, work environment and technologies, as well as relations with relevant interested parties**.

At the end of the discussion on the paradigm of perfection and improvement in management we should highlight the contribution of W.E. Deming. His examination and proposed solutions constitute the basis of numerous theoretical models of improvement. The PDCA (Plan-Do-Check-Act) cycle created and proposed by him, when applied within a given organizational culture [Gorzeń-Mitka 2013c, pp.21-32] not only makes it easier to improve management but also makes it possible to consolidate the habits of continuous improvement[Broniewska 2007]. According to W.E. Deming, the knowledge about the subject of improvement comprises four basic elements: theory of systems, theory of changeability, theory of knowledge and psychology, and these elements overlap and complement each other. The knowledge of systems allows one to navigate in the real world of an

** More details in: PN-EN ISO 14004; PN-EN ISO 9000, PN-EN ISO 9004, PN-N 18004.

organization functioning on the market and processes being improved. Knowledge of the theory of changeability enables one to learn the ways of examining the causes of event randomness and minimize their impact on a process. Knowledge of the theory of knowledge enables systematic and effective use of the achievements of the mankind. Finally, knowledge of psychology is necessary for finding out the sources of motivation of human beings and managing them in a way that is most optimal for them and the organization (especially in cross-cultural aspects). Only when these theories are simultaneously taken into account, it is possible to achieve success [Ejdys 2011, p. 109].

M. Rungtusanatham, C. Forza, R. Filippini and J.C. Anderson in their work entitled: “A replication study of a theory of quality management underlying the Deming management method: insights from an Italian context” [Rungtusanatham et al. 1988, pp.77-95] identified common features of management concepts based on the theory of continuous improvement by W.E. Deming. They include:

- visionary leadership,
- internal and external cooperation;
- learning;
- cross-cultural elements;
- management of processes;
- continuous improvement;
- employees’ satisfaction;
- customers’ satisfaction.

The set of these features, in the author’s opinion, is at the same time a group of assumptions that should constitute a model of an enterprise management in accordance with the paradigm of improvement.

Family enterprise as a paradigm of improvement

The specific features of family enterprises, as listed earlier in the paper (see table1: differences) and the assumptions of the paradigm of management improvement postulated by the author have many common areas. Further in the paper, they will be confronted with the assumptions of the improvement paradigm postulated.

The first assumption postulated in the paradigm of improvement is visionary leadership. In a family enterprise, the implementation of this assumption is manifested in succession. On the one hand, it may be a source of permanence and continuation of fundamental values, on the other hand, it is one of the main causes of a short life span of family companies [PARP 2012, s. 121].

The second assumption of the paradigm is internal and external cooperation. As shown in table 1, family enterprises are characterized by a specific organizational culture manifested in creation of a positive atmosphere at work for all employees and personalized relations with employees (sixth assumption), which, among other things, lead to higher work effectiveness (internal cooperation). In the area of

contacts with customers (stakeholders), it is characterized by high flexibility and involvement (seventh assumption).

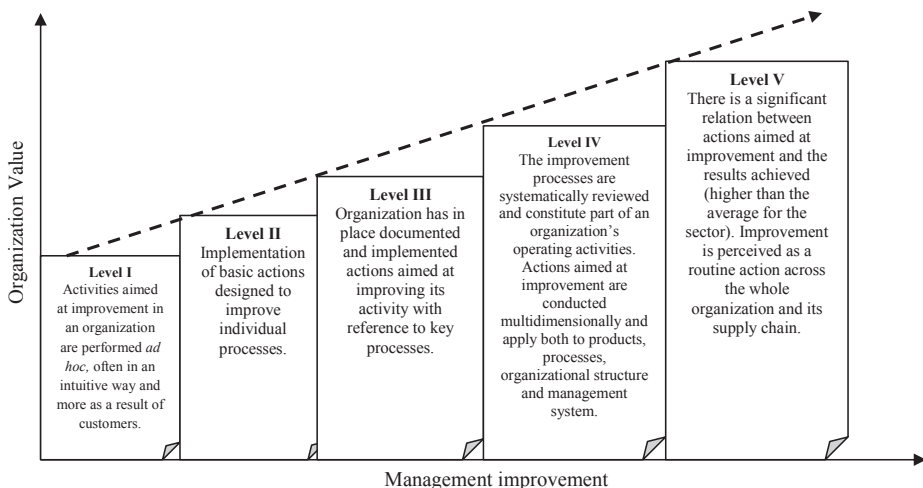
Another assumption of the paradigm postulated is learning. The specificity of family enterprises and awareness among family members that stability of the organization has impact not only on their income but also on the future of the other members of the family creates a special kind of motivation to search for new ways of learning.

Thus, as was pointed out above, there is a high degree of compatibility between the features characteristic for family companies and the paradigm of management improvement.

However, due to the fact that the process of achieving perfection by an organization through shaping its processes may take place at various levels, maturity of individual organizations in terms of perfection may vary. Figure 1 presents a proposed thus, as was pointed out above, there is a high degree of compatibility between the features characteristic for family companies and the paradigm of management improvement.

However, due to the fact that the process of achieving perfection by an organization through shaping its processes may take place at various levels, maturity of individual organizations in terms of perfection may vary. Figure 1 presents a proposed model of maturity of an organization management improvement.

Figure 1. Model of maturity of an organization management improvement



Source: own study based on: PN-EN ISO 9004 2010

It distinguishes 5 levels of achieving perfection in management by an organization in the context of value increase.

The first level represents a situation where activities aimed at improvement in an organization are performed ad hoc, often in an intuitive way and more as a result of customers' (or other stakeholders of the organization) reaction than internal needs (wishes).

The second level illustrates a situation where an organization has already taken first actions in the area of improvement, such as implementation of basic actions designed to improve individual processes. Most often, they include introduction of corrective actions to prevent the errors that were already discovered or reported by the stakeholders.

At the third level, an organization has in place documented and implemented actions aimed at improving its activity with reference to key processes. Moreover, the direction of these actions is in line with the strategy adopted and organization's goals, and the process of improvement is conducted at the strategic level.

The fourth level represents a situation where the outcomes generated in an enterprise from the processes of improvement become a source of achievements (values) of the organization. The improvement processes are systematically reviewed and constitute part of an organization's operating activities. Actions aimed at improvement are conducted multidimensionally and apply both to products, processes, organizational structure and management system.

The last, fifth, stage of the model represents a situation of a perfect enterprise. Improvement isn't here the result of requirements but internal needs (wishes) of the organization. There is a significant relation between actions aimed at improvement and the results achieved (higher than the average for the sector). Improvement is perceived as a routine action across the whole organization and its supply chain. Improvement is oriented towards increasing the organization's performance and is associated with its ability to learn and implement changes.

Conclusion

The paradigm of improvement postulated by the author has already been present, though unnamed, in examination and discussions in the field of management (also in cross-cultural view). However, the way of achieving perfection in this area has evolved over the years. Among the models and tools provided by management sciences, one of the attempts to solve this problem is the model of Continuous Improvement Management (CMI). Continuous Improvement Management is a corrective tool which allows a company to adapt to the changes in its environment and a tool to improve its processes. The use of CMI in the industry has proven that continuous improvement management leads to the achievement of better results and increase in an enterprise's competitiveness in the environment in which modern

organizations operate***. As M. Bednarek [2009, ss.29-33] points out, the CMI model may be presented as a process of continuous implementation in an enterprise of a set of methods, tools and philosophies, which is changeable and depends on individual characteristic features of a given company, selected and implemented depending on the changes within the enterprise and in its environment. Thus, the concept of CMI fits the conditions in which modern family organizations function and confirms the validity of the paradigm of improvement. The practice of the operation of family enterprises provides evidence that their specific features fit the paradigm of improvement in a special way.

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*** This is confirmed by the experience of companies such as Bosch, DelcoRemy, Mabe-GE, Eagle Pitcher, Mittal, Valeo czy General Motors.

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