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MANAGEMENT

THE COMPETITIVENESS OF THE HUNGARIAN MANAGERS

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For the first time we have studied the competitiveness of the Hungarian managers in 1996 using an international research method. Throughout this research 1300 top company managers were asked by questionnaires and 50 further managers through in-depth interviews. That research was connected to the research programme called: In Global Competition – The microeconomic factors of the Hungarian economy in the international competitiveness.

This research program was supported by the Research Center for Competitiveness that operates beside the Department of Business Economics at the Budapest University of Economic Sciences and Public Administration, continued in 1999 with the repetition of the empirical research. This is how we got the chance to carry out an analysis again and to compare the results received to those gained earlier and could examine that, whether there were changes between the preparedness, the ability level and in between the applied decision-making methods of the managers in the targeted three years.

The comparison's special spice was that the first group of samples was mostly export-orientated enterprises, but the second group of samples had moved toward small and medium sized Hungarian companies. Taking this under consideration we had to examine not only the time difference between the two researches, but the possibility of deviation because of the size of the economic units. Both samples included more than 300 companies from which we asked 4 managers each, not only the top managers but also the managers in charge for the trade and marketing, production and finance. This repeated research also relied on more than 1200 answers.

Methodologically we should mention that the results were mostly gained from self-evaluations, which probably distorted the whole image. However we do think that the importance of studying that what the managers think of their own capabilities is not lesser of value than if we could actually measure their capabilities.

This research is repeated for the third time this year. We are in the empirical phase of the research now and hope to get a clear picture about the Hungarian managers' preparedness and decision making approaches just in the moment of the EU accession.

The virtues of a good MANAGER

The specialists do not share the same views on how to evaluate the managerial performance. A possible way is to examine the economic values and achievements of the company managed by them. It shows clearly from the privatization-related and buying-up decisions that the preparedness, knowledge and the relations of a manager could influence the value of the company. In a knowledge-based economy the personal elements receive positive revaluation.

As we know the managerial performance is based on not only the applied approach of the decision-making method, but on the style of the leader. It also depends on what professional skills, qualifications, experience do they have and what is their own expectancy. This is why it is important to examine the managerial performance by their characteristics and capabilities. The examined capabilities are linked to the human resource management of a company and more likely to the corporate management.

What are the special capabilities, characteristics a manager should have to be successful? What are the weaknesses and strengths of a manager? Do these top managers have the same opinion of their own capabilities that are not in the same position? Is there a connection between the applied strategy, business performance and managerial capability? To get answers for these questions we have followed the earlier use of the international research scheme (HICKSON et al. 1986) and have compared the international results received to the replies we gained from the Hungarian managers. We observed that, do the Hungarian managers meet all requirements, analyzing the strengths and weaknesses according to the following characteristics and skills listed below:

- communication skills,
- expertise,
- executive skills,
- problem-solving skills,
- ability to represent the ideas,
- organizing skills,
- sense for business,
- IT knowledge (use of PC),
- analytic skills,
- practice-minded behavior
- risk-taking nature

The survey embraced the general abilities of management and those essential conditions and characteristics that are needed for a dynamical economy and business. The level of the decision making activity and the company's competitiveness is considerably influenced by the fact, who makes the decisions, what skills and capabilities they have, what their managerial style is, and also what techniques and methods they use in the course of decision making. Authors Andrew Gross, Robert Hartley, József Berács and Péter Gáspár (GROSS et al. 1995) had sought for and compared some socio-cultural samples, and on this basis characterized 300 Hungarian and 700 American managers. From their description the image of capable, slightly circumstantial and analytically thinking managers emerged having serious drawbacks in the field of using hi-tech equipment, compared with their American counterparts.

The results in connection with the abilities and preparedness of company management totally reinforced the above-mentioned and my research done earlier. The respondents now and then had to evaluate the strength of identical management skills and capabilities on a five-point scale.

The similarity between the results is very interesting because of the quite different samples we took. Only 1/3 of the companies was present at both evaluations. The dominant companies of the first evaluation (1996) were export-oriented enterprises, but the second sample we took contained small and medium sized Hungarian market oriented businesses. The improvement that is detected at the skills listed can be attributed to the natural development, but we should stop and think about the similarity of results received.

Conclusion is that the size of a business does not have significant influence on managers' abilities and skills.

Table 1   Ranks of managerial abilities from the surveys done in 1996 and 1999*

Evaluation of management in 1996 N=325		Evaluation of management in 1999 N=321	
practice-minded behavior	4.15	practice-minded behavior	4.16
expertise	3.99	expertise	4.06
problem-solving skills	3.78	problem-solving skills	3.91
sense for business	3.71	sense for business	3.83
communication skills	3.61	organizing skills	3.76
organizing skills	3.61	executive skills	3.74
ability to represent the ideas	3.60	communication skills	3.73
executive skills	3.54	ability to represent the ideas	3.69
risk-taking nature	3.47	analytic skills	3.57
analytic skills	3.46	risk-taking nature	3.53
IT knowledge	2.93	IT knowledge	3.04

*1-less likely, 5-more likely

A striking similarity between the two rankings is an extremely important issue from the perspective of the reliability of results. Both lists are headed by the same skills: practice-minded behavior, expertise, problem-solving skills and sense for business. These strengths outlined a highly able and pragmatic management that adopted the new conditions, but still lacked the risk taking nature and the ability to represent ideas, whereas both were necessary for an offensive management. Although there is an improvement in IT knowledge, it is still in the last space of the ranking, which shows that this is the weakest point of management. Last but not least the difference that can be seen from the evaluations taken in '96 and '99 is that there are no points given under 3 – this could mean that the managers feel as they have accomplished above the average in every skill.

THE FOUR MODELS OF DECISION MAKING

In the management literature, several organizational decision making models can be identified. These differ from each other in a sense that they use other prerequisites of decision makers and also refer to the organizational connections of decision makers. Researching the competitiveness in both cases we have identified four different models and decision-making mechanisms that reflected different approaches of decision theory.

When describing decision-making approaches we used Allison's (ALLISON 1971) widely known typology. According to this the following models can be identified:

1. Optimizing approach

The optimizing or rational unified acting approach assumes one-man decision-making, where the decision-maker proceeds in the sense of the classical economic approach to reach the optimal solution. This is a normative model that places analysis in the focus. All possible alternatives can be revealed along with reasonable costs and its consequences can be precisely measured. With the use of appropriate quantitative methods usually the optimal, profit-maximizing decision can be made, so this perception is usually called as the optimizing approach.

2. Political (Authoritarian) model

The political model deviates from the organizational model in a sense that it does not admit the existence of a superordinated goal within an organization, but assumes that each and every individual follows his/her own goals and interests in the decision making process. Words of power, under these circumstances, are decisive, as they represent the most efficient way of conflict resolution. Managers of important base-units of the organization strive to improve the situation of the directed unit with their full prestige. (That is why this model is usually called as an authoritarian

model.) Strategic decision- making bears the stamp of the interest-vindicating struggle of members of management.

3. Satisfying approach

In the organizational model several decision makers play a role in strategic decision-making, who though acting for a common superordinated goal, have their own goals too and mainly are in the possession of such cognitive barriers that they appear as bounded rational decision makers. This model assumes that in the course of decision preparation it is impossible to obtain all the information required, and as a consequence it is necessary to omit the use of quantitative methods necessary from an optimal decision-making perspective. Problems are usually far too complex, while level of uncertainty is high. Decision-makers do not even make efforts to find an optimal solution, because a satisfactory solution still corresponds to the organizational goals. With a satisfying approach, along with reasonable expenses, usually a good result can be reached.

4. Intuitive solutions

The model of behavioral decision theory investigates decision-makers who are not in the possession of the ability of rationality, and bring decisions that enable them to win time with and somehow "muddling through" from one situation to another. This approach requires sound preparedness in the phase of problem identification. Usually, an environment that is changeable and highly uncertain is dominating the strategic decisions of the organization. Decision-makers do not have enough time and resources for a comprehensive problem analysis. Solutions mostly rely on managerial experience accumulated before and the detailed analysis is frequently replaced by intuitive solutions.

We did not indicate professional denominations of individual approaches in the questionnaire in order to avoid any accidental negative connotations attached to them, which might influence the answers. The executives interviewed gave their answers on a 1-5 scale, where 1 indicated that the approach described had not been characteristic to their company at all, while 5 indicated that they had proceeded entirely in the sense of the principles outlined above.

It is evident from the short introduction of the major characteristics of models that an organization, which can create its decision-making mechanism according to the optimizing model of the normative decision theory, can gain a competitive edge compared with other organizations. However, descriptive decision theory tendencies point out that in real decision situation, especially in case of complex company decisions that go along with a high level of uncertainty, several factors can hinder the surfacing of the normative model in its clear form. Important causes of differences between the ideal of the rational model and the other three models eliminate decisions in reality.

Along with the optimizing model we evaluate positively the decision-making mechanism that seeks to reach satisfying decisions, which, although resigns from the hope to find an optimal solution, still it strives to reach the appropriate solution, through the accomplishment of a high level of procedural rationality. In a decision making process, which can be characterized with a political or an intuitive model, such mistakes of troubles can surface in the course of the decision making that have a negative impact on the final outcome and the performance of the company.

Figure 1
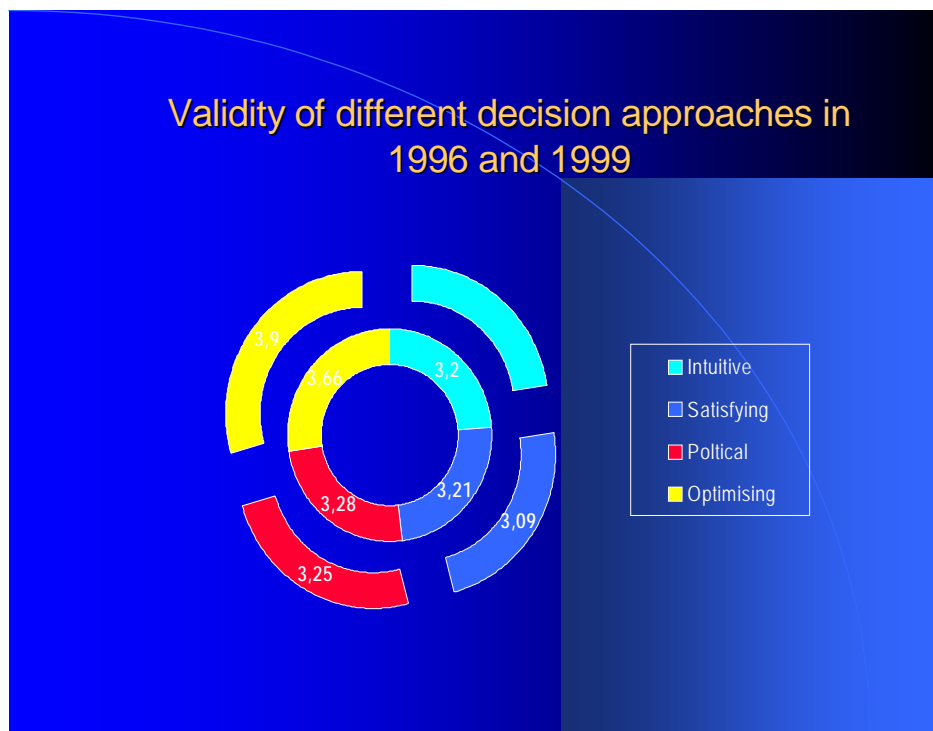
If we compare the received result it is evidential that, there is a slight tendency toward the optimizing, more rational approach. At the same time a withdrawal of the three other decision approach models can be detected. It is assumed that the decision-making process, in the sample we took, is more considered and rational. These companies tried to stay away from making decisions by intuitive approach.

Position influences the consciousness

It was very interesting to investigate that, how do the managers in different positions judge the decision-making approaches used within their organizations.

Table 2. **The role of decision approaches according to managers in different positions***

(N=321)

Model	Average	STANDARD DEVIATION
CEO		
optimizing	3.90	-0.3
satisfying	3.08	0.4
political	3.19	1.8
intuitive	2.93	1.2
Financial director		
optimizing	3.91	-0.5
satisfying	3.02	2.4
political	3.25	-0.2
intuitive	2.95	0.6
Production director		
optimizing	3.86	0.8
satisfying	3.12	-1.1
political	3.17	2.3
intuitive	3.00	-0.9
Marketing director		
optimizing	3.89	0.0
satisfying	3.14	-1.7
political	3.38	-3.9
intuitive	2.99	-0.8

*1- less likely, 5 – more likely

It turns out from the data of the table that managers with different positions do not judge characteristics of company decision-making mechanisms in a significantly different way. All company managers feel that the decision making process of their organization is rather similar to the optimizing decision model. At the same time it can be stated that at the companies of our sample, along with the optimizing model the other three satisfying, political and intuitive models also play a role in strategic decision-making. The rational or optimizing decision approach is not characterized of managers in financial fields, the production directors and the marketing directors. The political or authoritarian approach is typical of executive directors and production directors. The mentioned model can efficiently handle conflicts. Executives and financial leaders mostly

recognize intuitive solution, which is natural because they have the chance to practice it. We can assume that, managers in different fields feel stronger to the decision-making approaches conform to their own, than the average. In conclusion we should investigate the opinions of the executives concerning different approach models. Favoring the optimizing of rational approach is interesting because it states the opposite of Ron Schultz's (SCHULTZ 1996) observations. Schultz has examined the decision-making behavior of American top managers, and came to the conclusion that executives are characterized by the intuitive approach, but their substitutes apply the rational approaching methods.

Figure 2
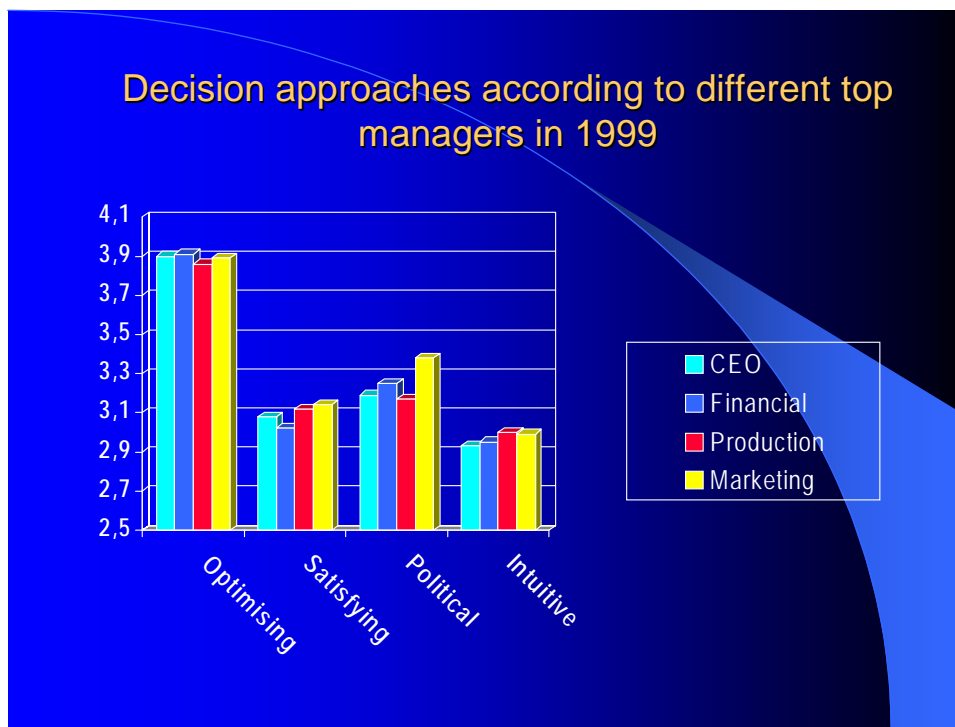
To demonstrate the difference between managerial opinions we have defined an analytical frame stating the dimension of deviation of managerial abilities and the preferred approaches of decision-making. We were still differentiating the four approaches: the optimizing, the political, the satisfying and the intuitive, further more we had respect for the 11 managerial abilities analyzed earlier. Studying the evaluation and deviation of the four managerial fields it could be assumed that the most different opinions were of the sense for business, IT knowledge and of the analytical skills. This is interesting because these abilities received the lowest ranks. Production directors and the executives gave better ranks to their own management in these fields, while the marketing and financial directors were more critical. Financial directors gave the lowest marks to all capabilities,

while executives found problems only in practice-minded behavior. According to the judgment of marketing directors the strongest skills their own management had were the communication skills, the ability to represent the ideas and the organizing skills. They were unsatisfied with the practice-minded behavior and with the risk-taking nature. Opinions of the production managers were represented by the underevaluation of the ability to represent the ideas, the problem-solving skills and organizing skills.

From the opinion comparison it can be seen clearly that the most agreed approach was the optimizing. This result also confirms that this is the most dominant approach. The most extremely evaluated approach was the political. Production directors and executives thought it the most likely approach, while the marketing and financial directors judged it the least likely approach.

The satisfying and the intuitive decision-making approaches – which are professionally close to each other – have received a similar judgment. These approaches are more likely from the executive's and financial director's point of view, than from the production and marketing directors.

If we compare the deviated opinions of abilities and approaches the following can be stated for the managers:

Executives: The preparedness of management is ranked positively, especially satisfied with their analytical abilities and sense for business. Although we can sense the prejudice from their answers, they only request pragmatism from their selves and from their colleagues. The excellent preparedness gives an extra munition for practicing the decision-making approaches. They accept the validity of the political and intuitive approaches, which demand an abundant of concentrating and creativeness.

Financial directors: They are the most critical, underevaluated their selves and their colleagues. Recognition of the insufficient IT knowledge and communication skill can be observed, but the demand for the organizing skills and for the analytical abilities is present. They are also not satisfied with the risk-taking nature. From their point of view the validity of the optimizing approach is weak, which means that they are not pleased with the rationality of decisions.

Production directors: They recognize the managerial preparedness, but require the problem-solving skills, the ability of representing the ideas and the organizing ability from their selves and from their colleagues. From their criticism we can easily assume the demand for practical methods. They definitely refuse the bounded rationality and the intuitive approaches, which couldn't successfully be used in their fields.

Marketing directors: They were almost as critical as the financial directors are, but they are satisfied with dynamic leading abilities. They think highly of the communication skills and recognize the risk-taking nature. It is not an advantage for them if the political approach is not

working properly in problem-solving methods at the company, because they represent it directly outward.

CONCLUSIONS

It is assumed that a successfully led business does not depend only on the managerial skills and abilities but on practicing the right decision-making approach, which can be a determinant in the marketing and financial efficiency.

Summing up the results of the cluster analysis it can be stated the hypothesis was confirmed by that, successful businesses are characterized of being as rational as they can be, since the strong effects of the optimizing approach can be detected.

The improvement that was detected at the skills and abilities can be attributed to the natural development, but we should think about the similarity of results received. Conclusion is that the size of a business does not have significant influence on managers' abilities and skills.

Both lists of capabilities were headed by the same skills: practice-minded behavior, expertise, problem-solving skills and sense for business. These strengths outlined a highly able and pragmatic management that adopted the new conditions, but still lacked the risk taking nature and the ability to represent ideas, whereas both were necessary for an offensive management.

The analysis supported that, rational decisions and optimizing techniques, especially if highly skilled managers practice them, enable the company to be successful.

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AN EARNED VALUE BASED COMPREHENSIVE MODEL FOR PLANNING AND CONTROLLING CONTRACTOR CASH-FLOW

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1. INTRODUCTION

Planning and controlling are twin brothers in the project implementation process. Regarding implementing a project, planning itself encompasses scheduling, resource allocation and cost estimation in the first place. Techniques available for these purposes are equally applicable for both project clients and external contractors. Unlike planning, controlling adopts mainly a client-view of the problem. Especially the so-called systematic control methods, such as 'Committed Cost Management' [5] and 'Earned Value Reporting System' [1, 2, 3] are cases in point. Most of the project management software packages can provide the earned value-based report (also referred to as 'Earned Value Performance Measurement').

Experience shows, at the same time, that sometimes contractors prepare cash-flow plans but these are rather monitored than being controlled. Neither the previously mentioned Committed Cost Management nor the Earned Value Reporting System can provide the possibility for contractors to plan and control the contract cash-flow. Though planning and controlling this cash-flow and the associated likely margin are vital of importance from the point of view of the long-term success of the contractor organisations.

Recently an idea was developed by the author of this paper that encompasses both planning and controlling contractor cash-flow in a robust model in order to satisfy the need of external contributors, especially contractors, in the course of the project implementation process. The copyrighted model allows planning and controlling contractor cash-flow in activity/time unit

manner, and also in summarised forms considering the entire project implementation process from the outset of the project work till a specified reporting date. Since this new model utilises a few of the earned value measurements and indicators, first the Earned Value Reporting System is recalled briefly. Then the measurements and the indicators of the comprehensive new model will be introduced. The associated exhibits and graphs that could visualise the status of the project implementation – because of the limitations – are not introduced extensively, attention is given to illustrating the use of them.

Though, the next issue of SENET Project Management Review provides these tools in detail. Finally, the potential advantages gained by contractors in the course of using this model will be highlighted.

The recently developed new model is copyrighted, and the associated software program is also planned to be introduced during the 18th IPMA World Congress in Budapest.

2. MEASUREMENTS AND INDICATORS IN THE EARNED VALUE REPORTING SYSTEM

These measurements and indicators are well known from literature [1, 2, 3], nevertheless, since the new model utilises a few of these measurements, a brief summary of them looks wise.

- **BCWS** (Budgeted Cost of Work Scheduled) means the estimated cost of a single activity in the project time schedule that could be understood proportionally regarding a certain reporting period.

- **BCWP** (Budgeted Cost of Work Performed) means the estimated cost of a single completed project activity or the proportional part of the estimated cost in accordance with the completion rate of the given activity in case of a certain reporting period. BCWP is referred to as earned value.

- **ACWP** (Actual Cost of Work Performed) means the cost occurred in the course of completing a single activity or a certain part of this activity that was completed during a given reporting period.

- **OD** (Original Duration) indicates the planned or scheduled duration time of the project implementation, i.e. the length of the critical path.

- **ATE** (Actual Time Expended) indicates the time period elapsed from commencing the project implementation till a given reporting date.

- **BAC** (Budgeted Cost at Completion) indicates the estimated cost of project implementation, i.e. the total sum of BCWS assigned to each project activity.

Turner [6] argues against the use of the word 'scheduled', and suggests instead of that the word 'planned'. At the same time, the American Project Management Institute supports the attempt to introduce more simple acronyms in order to make the use of the reporting system easier. In this way, instead of BCWS the acronym PV (Planned Value) is suggested, while BCWP should be replaced with EV (Earned Value), and ACWP is suggested to be AC (Actual Cost). For the sake of avoiding any ambiguity, in this paper the original long acronyms are used.

By means of the above mentioned measurements the following indicators are calculated in the Earned Value Reporting System:

- **SV** and **SPI**

Both indicators show accomplishment achieved on the project activities in comparison with the planned (scheduled) accomplishment.

- **CV** and **CPI**

These indicators sign the cost occurred in the course of accomplishment achieved on the project activities compared to the associated estimated cost.

Based on the measurements and indicators the following forecasts are available:

- **ETC** (Estimated Time to Completion), that signs the likely completion period of the entire project at the time of a certain reporting date.
- **EAC** (Estimate at Completion) signing the likely completion cost of the project at the time of a given reporting date.

Since ETC and EAC forecast the likely completion time and cost, calculations require cumulative data regarding those project activities that were under completion during the time period elapsed from commencing project implementation up to a certain reporting date. Measurements, indicators and the forecast outcomes make possible to evaluate:

- **FCSV** (Forecast Schedule Variance at Completion)=OD-ETC
- **FCCV** (Forecast Cost Variance at Completion)=BAC-EAC

The outcomes of calculating the indicators and the likely forecast date may be visualised by means of exhibits and graphs.

3. MEASUREMENTS IN THE COMPREHENSIVE CASH-FLOW PLANNING AND CONTROLLING MODEL FOR CONTRACTORS

Central to this model are the contractor cash-flow balance and the associated margin that could be earned by a contractor organisation. In order to plan and analyse the contractor cash-flow in case of any specified time unit or reporting date and forecast the expected margin based on a

given project status, there is a need for new measurements and indicators beyond those used in the previously mentioned earned value system. Because of the potential integration of the earned value concept and the proposed comprehensive contractor cash-flow model, the structure of the new measurements and indicators are in line with the structure of the earned value measurements and indicators.

The model requires the following new measurements [4] in order to make calculating the necessary indicators possible:

❖ **PVWS** (Price Value of Work Scheduled)

This is the measurement that expresses the value, in terms of price, earned by the contractor when BCWS=BCWP, thus SV=0 and SPI=1, i.e. this is the scheduled financial performance of the contractor. PVWS should be calculated in case of each project activity either considering a given reporting period or regarding the time period elapsed from the start of a project activity up to a specified reporting date. In case of lump sum price the contact price should be broken down in accordance with the time schedule. Summing up the individual PVWS figures results in the amount of money to be paid to the contractor by the client.

❖ **PVWP** (Price Value of Work Performed)

This measurement shows the earned financial performance of the actual achievement on a project activity. The individual PVWP figure of an activity can be calculated based on the underlaying PVWS figure.

❖ **IVWS** (Invoiced Value of Work Scheduled)

This is the measurement that expresses the value, in terms of price, that could be invoiced by the contractor if the actual achievement was as much as the scheduled achievement. The individual IVWS figure of any activity may be calculated regarding a given reporting period or considering the time period elapsed from starting a project activity till the end of a specified reporting date.

❖ **IVWP** (Invoiced Value of Work Performed)

This measurement encompasses that part of the earned financial performance (PVWP) which may be invoiced. The individual IVWP figure of an activity can be calculated based on the underlaying PVWP figure.

❖ **AVWS** (Account Value of Work Scheduled)

This measurement shows that part of IVWS (Invoiced Value of Work Scheduled) which could be transferred to the contractor's bank account if the contractor's actual achievement was as much as the scheduled achievement. The individual AVWS figure of a certain activity could be calculated either in case if a given reporting period or considering the time period elapsed from starting the

activity up to the end of a defined reporting period.

> ❖ **AVWP** (Account Value of Work Performed)

This measurement represents that part of the invoiced value (IVWP) which is transferred to the contractor's bank account, thus the AVWP figures should be calculated based on such data that are available on the contractor's bank account and on the contractor's submitted invoice.

> ❖ **EEWS** (Estimated Expenditure of Work Scheduled)

This is the measurement that expresses that amount of money that would be paid out by the contractor to finance the cost of implementing project activities if the contractor's actual achievement was equal to the scheduled achievement. The EEWS figure of an individual project activity is calculated based on the estimated cost of the activity and the associated payment conditions regarding the resource suppliers (subcontractors, suppliers, labour forces etc.)

> ❖ **AEWP** (Actual Expenditure of Work Performed)

This measurement means the amount of money that is paid out by the contractor in order to finance the cost of implementing the project activities. Data for calculating AEWP figures are available on the contractor's bank account (in case of subcontractors, suppliers etc.) and from the contractor's financial accounting system (in case of internal costs, such as wages etc.).

In the course of introducing the measurements, apart from PVWS, only the so-called price-based type of payment (lump sum or unit price/rate) was in the forefront since this is the most widely used payment type. At the same time, it was mentioned also only in case of PVWS (in order to avoid too much monotony) that the lump sum price should be broken down in accordance with the project time schedule. However, the same breakdown of the lump sum price is to be considered when IVWS (Invoiced Value of Work Scheduled) and AVWS (Account Value of Work Scheduled) figures are calculated.

Also for the sake of reducing monotony, the case of cost-based type of payment was mentioned only when PVWS (Price Value of Work Scheduled) was discussed. Though, the solution suggested in connection with PVWS, regarding the cost-based type of payment, is to be applied also in connection with PVWP, IVWS, IVWP, AVWS, AVWP, EEWS and AEWP. Regarding both EEWS and AEWS, it should be taken into account that the so-called fee in case of the cost-based payment contains some profit element.

When the term 'cost' is considered regarding any measurement discussed in this section, one should bear in mind that it have to be taken into account from the point of view of a contractor organisation.

4. INDICATORS IN THE COMPREHENSIVE CASH-FLOW PLANNING AND CONTROLLING MODEL FOR CONTRACTORS

Based on the previously introduced measurements the following indicators [4] are available supporting both planning and controlling contractors' cash-flow regarding the project implementation process:

❖ **FV** (Financial Variance) = PVWP-PVWS, and

FPI (Financial Performance Index)=PVWP/PVWS

Both indicators show how the achieved financial performance, in terms of price, progresses in comparison with the scheduled performance during a given reporting period or during the time period elapsed from the start of an activity up to a specified reporting date.

❖ **PIV** Planned Invoice Variance) = IVWP-IVWS, and

PIPI (Planned Invoice Performance Index) = IVWP/IVWS

These indicators show how the invoicable part, in terms of price, of the achieved financial performance progresses in comparison with the planned invoicable value of the scheduled performance. Both of them are understood either in case of a single reporting period or during the time period elapsed from commencing an activity till a defined reporting date.

❖ **IV** (Invoice Variance =IVWP-PVWP, and

IPI (Invoice Performance Index)=IVWP/PVWP

The above two indicators show how the invoiced part of the achieved financial performance progresses in comparison with the entire achieved financial performance during a given reporting period or during the time period elapsed from the beginning of an activity up to a specified reporting date.

❖ **AV** (Account Variance)=AVWP-IVWP, and

API (Account Performance Index)=AVWP/IVWP

Both indicators show how the money for the invoiced performance appearing on the contractor's bank account progresses in comparison with the invoiced amount of money, either in case of a given reporting period or during the time period elapsed from the start of a given activity till a defined reporting date. Under normal conditions it may not happen that the amount of the total receipts is higher than the total amount of the invoiced performance, though it could occur in case of certain reporting periods.

❖ **PBV** (Planned Balance Variance)=AVWS-EEWS, and

PBPI (Planned Balance Performance Index)=AVWS/EEWS

These two indicators show how the contractor's planned cash-flow balance progresses in case of a

single reporting period or during the time period elapsed from starting an activity up to a specified reporting date.

   ❖ **BV** (Balance Variance)=AVWP-AEWP, and

      BPI (Balance Performance Index)=AVWP/AEWP

Both indicators show how the contractor's actual cash-flow balance progresses either in case of a single reporting period or during the time period elapsed from the beginning a project activity till a certain reporting date. Though forecast regarding the cash-flow balance to completion can be interpreted, in reality this forecast should result in the same amount than the forecast regarding the contractor's margin to completion of the project. Thus, the question of forecast will be introduced separately.

   ❖ **PV** (Plan Variance)=BV-PBV, and

      PPI (Plan Performance Index)=BV/PBV

Both PV and PBV could have negative values, even both of them at the same time. Thus, in order to gain realistic results, both BV and PBV should be considered in absolute terms. In this way these indicators shows how the contractor's actual cash-flow balance progresses in comparison with the planned cash-flow balance during a reporting period or during the time period elapsed from starting an activity up to a defined reporting date.

   ❖ **MV** (Margin Variance)=IVWP-ACWP, and

      MPI (Margin Performance Index)=IVWP/ACWP

These indicators show how the contractor's potential margin progresses in case of a given reporting period or regarding the time period elapsed from the start of a project activity up to a specified reporting date. In the course of calculating MV and MPI, theoretically both PVWP and AVWP would be used instead of IVWP. While, also theoretically, AEWP would be used instead of ACWP. The use of IVWP is justified by the fact that till the end of completing the project PVWP generally encompasses a certain part of the achieved financial performance that may not be invoiced at a given reporting date. At the same time, the use of AVWP restricts the opportunities regarding the potential margin since it should be presumed that the invoiced amount of money would be transferred to the contractor's account. On the other hand, the use of AEWP instead of ACWP could beautify the opportunities regarding the potential margin since the costs occurred should be, sooner or later, paid out.

Each of the eight variances and each of the associated eight indices indicates the progress of a certain facet of the likely contractor's cash-flow and the likely margin. The interpretation of the variances (in numerical terms) is self-evident, while the indices are explained similarly to the indices used in the Earned Value Reporting System.

Thus, if the value of a certain index is below zero, it shows an unfavourable situation, while the opposite case – when the value of a certain index is above zero – means favourable situation. For example:

➢ When IVWP > ACWP, thus MPI > 1, then the margin is positive.

➢ When IVWP = ACWP, thus MPI = 1, then the margin is zero.

➢ When IVWP < ACWP, thus MPI < 1, then the margin is negative

The other variances and indices should be interpreted in the same way.

❖ **EMC** (Expected Margin at Completion)

EMC=AMWP+(PMC-PMWP)*MPI

where: AMWP (Actual Margin of Work Performed)=PVWP-ACWP

        PMC (Planned Margin at Completion)=IAC-BAC

        where: IAC (Invoice Value at Completion)=‡"PVWS

        PMWP (Planned Margin of Work Performed)=PVWP-BCWP

In connection with forecast regarding EMC, it should be noted that the reliability of the forecast depends to a great extent on the characteristic of the payment mechanism stipulated in the payment conditions of the contract.

When this payment mechanism is front-loaded, the forecast will predict – especially during the firs part of the project implementation process – an unlikely high margin. In the opposite case, if the payment mechanism is end-loaded, the opportunities regarding EMC will be worse than the real opportunities, especially during the first part of the project implementation, again. Thus, the reliability of EMC calculation determined by the extent of the unbalanced characteristic of the payment mechanism.

5. EXHIBITS AND GRAPHS USED IN THE COMPREHENSIVE MODEL

A few of the possible relationships that exist amongst the measurements have been emphasised earlier, though all the possible relationships can be visualised by means of 'S' curves against time. Unlike the case of measurements used in the earned value concept, the number of measurements used in this model is not favourable to plot them in a single figure. Plotting the progress of all measurements against time in one figure to visualise their relationships would result in a crammed and, at the same time, puzzling picture. In this way such a figure would rather trouble than help professionals to evaluating the project status. Thus, graphs and the associated exhibits are plotted individually in case of each measurement and indicators [4]. Because of the limitations, only a few exhibits and graphs are introduced here to illustrate the use of the model.

Time units / Activities	1	2	...	n	Σ
A	PBV_{A1}	PBV_{A2}	...	PBV_{An}	$\sum_{i=1}^{n} PBV_{Ai}$
B	PBV_{B1}	PBV_{B2}	...	PBV_{Bn}	$\sum_{i=1}^{n} PBV_{Bi}$
...	...	...	...	...	...
N	PBV_{N1}	PBV_{N2}	...	PBV_{Nn}	$\sum_{i=1}^{n} PBV_{Ni}$
Σ	$\sum_{k=A}^{N} PBV_{k1}$	$\sum_{k=A}^{N} PBV_{k2}$	...	$\sum_{k=A}^{N} PBV_{kn}$	$\sum_{i=1}^{n}\sum_{k=A}^{N} PBV_{ki}$

Exhibit 1
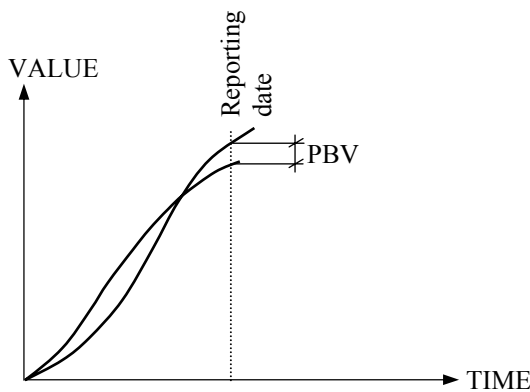
Figure 1
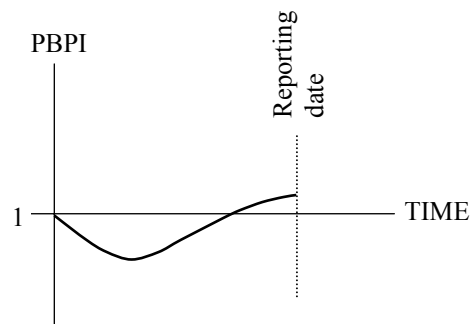
Figure 2

Based on Exhibit 1 one can evaluate the progress of PBV in case of a given project activity considering a certain time unit (e.g. PBV_{A1}) or considering the time period that elapsed from the beginning of an activity till a given reporting date (e.g. $\sum_{k=A}^{N} PBV_{k1}$). At the same time, it is also possible to evaluate the progress of PBV of those activities that are under implementation during a certain time unit (e.g. $\sum_{i=1}^{n} PBV_{Ai}$). While the progress of PBV regarding the entire project from the start of implementation up to a specified reporting date also may be evaluated (e.g. $\sum_{i=1}^{n}\sum_{k=A}^{N} PBV_{ki}$).

Figure 1 shows the progress of AVWS and EEWS, and consequently the progress of PBV

while Figure 2 interprets the progress of PBPI, also against the time. In case of both Figure 1 and Figure 2 the progress of the previously mentioned measurements and indicators can be interpreted, when it looks necessary and/or possible, even considering a single project activity as well.

When there is no potential for interpreting PBV on the level of the project activities in case of a given project context, the following tabular arrangement could be helpful to summarise the progress of PBV on project level (Exhibit 2).

Time units / Planned cash-flow	1	2	…	n	Σ
AVWS	$AVWS_1$	$AVWS_2$	…	$AVWS_n$	$\sum_{i=1}^{n} AVWS_i$
EEWS	$EEWS_1$	$EEWS_2$	…	$EEWS_n$	$\sum_{i=1}^{n} EEWS_i$
PBV	PBV_1	PBV_2	…	PBV_n	$\sum_{i=1}^{n} PBV_i$

Exhibit 2

Finally, Exhibit 3 shows the progress of MV, Figure 3 visualise the progress of IVWP and ACWP, and Figure 4 provides the progress of MPI.

Time units / Activities	1	2	…	n	Σ
A	MV_{A1}	MV_{A2}	…	MV_{An}	$\sum_{i=1}^{n} MV_{Ai}$
B	MV_{B1}	MV_{B2}	…	MV_{Bn}	$\sum_{i=1}^{n} MV_{Bi}$
…	…	…	…	…	…
N	MV_{N1}	MV_{N2}	…	MV_{Nn}	$\sum_{i=1}^{n} MV_{Ni}$
Σ	$\sum_{k=A}^{N} MV_{k1}$	$\sum_{k=A}^{N} MV_{k2}$	…	$\sum_{k=A}^{N} MV_{kn}$	$\sum_{i=1}^{n} \sum_{k=A}^{N} MV_{ki}$

Exhibit 3
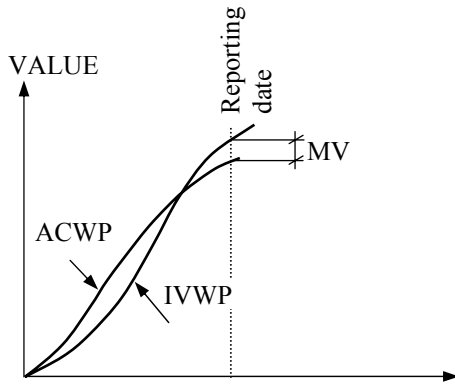
Figure 3
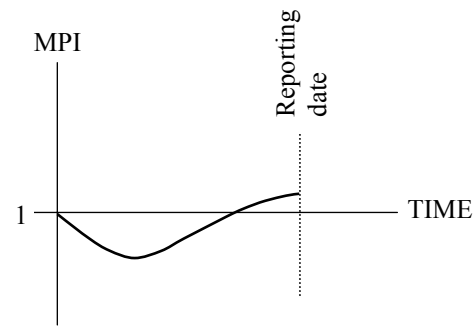
Figure 4

6. GAINS THAT CAN BE REALISED BY A CONTRACTOR ORGANISATION

In order to highlight those gains that could be realised by contractor organisations by means of using the previously introduced model, it looks reasonable to summarise the applicability of the Earned Value Reporting System. In case of internal projects (project activities are implemented by the clients' own resources) the earned value concept can provide an unambiguous and clear picture regarding the timely completion and the associated cost while it can predict the likely completion period and the associated cost to completion. In such a case the client is the only primary organisation taking part in implementing the project. Thus, based on the time plan and the activity-based cost estimation figures the client can elaborate a reliable cash-flow plan that could be compared with the actual cash-outflow. At the same time, by means of the forecast figures (ETC and EAC) the likely cash-outflow also could be interpreted. In case of external projects (project activities are implemented by external contributors) there are – at least – two or more primary players in the project implementation process. From the point of view of a client organisation the use of the Earned Value Reporting System can provide the required information either in terms of timely completion or cost occurred, and consequently the likely cash-outflow also can be predicted. When cost-based type of payment is used in the contract, the contractor organisations also can utilise the earned value concept since the contractors' cash- inflow depends on the actual cost occurred (ACWP), especially in case of the so called 'cost plus percentage' model. In this way, based on the Earned Value Reporting System, contractor organisations also can predict their likely cash-inflow. Unlike the above situation, when price-based type of payment (lump sum or unit price/rate) is used in the contract, the contractors' cash-inflow does not depend on the cost occurred in the course of implementing project activities. In other words: contractor cash-inflow is determined by the fixed price(s) and payment conditions specified in the contract. In such a

situation there is a need for a reliable cash-flow plan and the associated cash-flow control in the contractor organisations, since these organisations should face the following questions that are vital of importance:

❖ What is the reliable bid price? The term 'reliable' means, on the one hand, competitive, i.e. attractive for the client, and, on the other hand, it means that the bid price should cover also the cost that is associated with financing the negative cash-flow balance periods in the course of the project implementation.

❖ The phenomenon of reliable bid price involves a further question, i.e. how does the cash-flow balance progress either in terms of planned balance or in terms of actual balance?

❖ The progress of the actual balance determines to a great extent the likely margin earned by the contractor, thus, a new question emerges: what is the achievable margin at the end of completing the contracted works?

The Comprehensive Model for Planning and Controlling Contractor Cash-Flow can provide the answers to the above questions. In order to get these answers, i.e. the information involved in the answers, there is a need for the 8 measurements (apart from the measurements used in the earned value concept) and the 16 indicators introduced in this paper, and 1 forecast formula. Of course, the integration of this model and the Earned Value Reporting System postulates the use of the earned value concept as well.

The proper and reliable use of this model requires a reliable time schedule and a reliable activity-based cost estimation that is in accordance with the time schedule, otherwise there is no potential for a reliable cash-flow plan and cash-flow control. Consequently there is no potential for a reliable margin forecast.

What makes the model user-friend is the fact that data necessary to calculate both measurements and indicators (including EMC) are existing data in the contractor organisations, i.e. there is no need for gathering new, previously non monitored data. It is also a user-friend characteristic of the model that it allows analysis (by means of the exhibits) in:

❖ an activity/time unit,

❖ an activity/time elapsed,

❖ all activity/time unit,

❖ all activities/time elapsed

manner. In this way, the model allows a deep insight into details of the contractor's cash-flow progress and the associated margin either in terms of planned or in terms of actual figures. This feature of the proposed model enables contractor organisations at the same time, to identify the most appropriate corrective actions – if necessary – in the course of implementing the project.

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CONSIDÉRATIONS SUR L'ÉVOLUTION DU CONTENU DES CONCEPTS DE LA QUALITÉ

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Résumé: *L'article présente les considérations de l'auteur sur l'évolution et la définition de la qualité ainsi que des concepts y associés tells que qualité : adéquate, attendue, visée, réalisée, perçue, optimale, totale, assurance qualité, contrôle qualité, etc. qui permettront aux lecteurs et surtout aux entrepreneurs, jeunes et moins jeunes, de mieux comprendre la signification des notions afin de les utiliser d'une manière efficace dans leurs taches quotidienne de managers.*

La plupart de gens utilisent le mot qualité dans leur vocabulaire sans se soucier de sa définition rigoureuse, et ils s'en sortent sans problèmes. Mais, lorsqu'on est sensé à manager/diriger une activité ou une entreprise il est impératif, de bien connaître, maîtriser et utiliser les concepts. Le concept de qualité regroupe un ensemble des thèmes divers dont les frontières restent assez floues et qui ne fait pas l'unanimité.

Il est utile de s'en souvenir, à l'appui de cette situation, les mots de R. Hale qui disait: **« Comme tous les concepts importants la Qualité est d'une grande simplicité, à tel point que les gens ont beaucoup de mal à comprendre ce qu'elle signifie »**

Une des définitions claire et largement acceptée est :

La *qualité* représente la satisfaction des besoins du client, du point de vue de la **performance**, du **prix** et du **délais** de livraison d'un produit (fig.1).
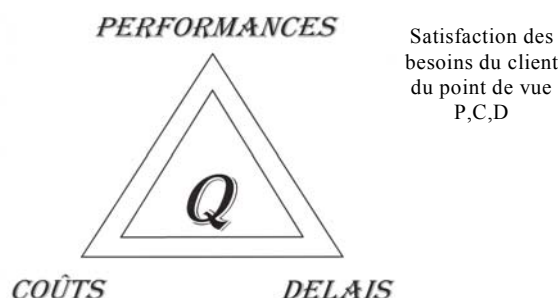
Fig. 1

Le produit peut être matériel ou immatériel (service). Il en existe d'autres définitions, relativement rigoureuses, comme par exemple :

- « La Qualité, c'est l'ensemble des propriétés et caractéristiques d'un produit ou service qui lui confèrent l'aptitude de satisfaire des besoins exprimés ou implicites » (Extrait de la norme ISO 8402) ; celle-ci n'est pas tout à fait claire au départ et nécessite donc que chacun des termes de la définition soit explicité par des notes ce qui est fait dans la norme ; ou encore :
- « La Qualité, c'est l'aptitude à l'emploi » (J.Juran).
- « La Qualité, c'est la conformité aux spécifications **»** (P. Crosby).

On peut citer aussi des approches moins rigoureuses telles que:

- « La Qualité, on ne peut pas la définir, on la reconnaît quant on la voit » ;
- « La Qualité c'est une mode » ou
- « La Qualité c'est la perfection » (pour ceux qui ne comprennent pas) ; ou encore
- « la Qualité c'est le contraire de la Non-Qualité » (pour ceux qui ont compris ce qu'est la Non Qualité), etc.

L'énumération, non-exhaustive, de ces définitions nous permet d'affirmer que la *qualité* est une *perception relative* car chaque entité (société, individu) peut définir selon ses propres critères (y compris subjectifs) la réponse appropriée à ses besoins et que les notions de performance, coût et délai sont interactives et qu'elles peuvent varier d'une époque à une autre, d'une entité à l'autre en fonctions de différents paramètres.

En associant un adjectif qualificatif au mot qualité tel que : attendue, visée, réalisée, perçue, adéquate, optimale, finale, totale etc. on arrive à des notions plus spécifiques qui nous permettent de voir la qualité sous d'autres angles. Leur signification sera explicitée ci dessous.

Si on tient compte de la relation client - fournisseur on peut définir: une *qualité attendue*, une *qualité visée*, une *qualité réalisée* (mise en évidence par la mesure de la performance de l'entreprise) et finalement une *qualité perçue* (ressortie p.ex. d'une mesure de satisfaction du client).

Ces quatre qualités, dont la première et la dernière concernent le client et la deuxième et la troisième le fournisseur, forment une boucle (fig.2) connue sous le nom de « cercle vertueux de la qualité ».

Boucle de la qualité
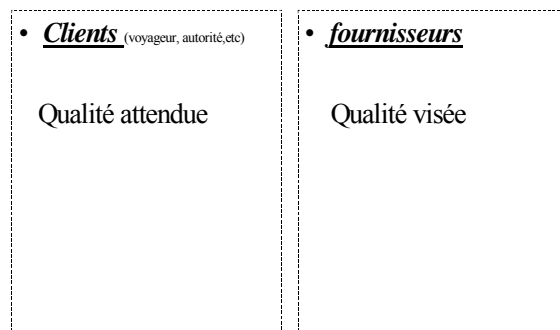
Fig. 2

Les notions qualités énumérées plus haut étant forcement différentes, l'idéal serait de réduire aux maximum l'écart entre elles. C'est ce qui se passe d'ailleurs, lorsqu'on applique avec rigueur, le principe de l'amélioration continue dans toutes les activités internes et externes d'une entreprise.

Le graphique (fig.3) permet de visualiser et de définir la *qualité adéquate*. Ainsi, on peut identifier différentes zones: 1) qualité conforme, 2) hasard heureux - satisfactions des besoins implicites, 3) sur-qualité, 4) défaut, 5) travail inutile de conception, 6) exigences non satisfaites, 7) gaspillage.

Il est bien évident que l'efficacité d'une entreprise ou d'une société sera d'autant plus grande que la zone 1 (à la limite même la zone 2) sera plus grande ou, dans d'autres mots, que les trois cercles soient le plus juxtaposés possible. Cela peut se réaliser lorsqu'on maîtrise la qualité dans tous les secteurs d'activité de la société ou de l'entreprise.

Qualité adéquate

- 1) qualité conforme
- 2) hasard heureux (satisfactions des besoins implicites)
- 3) surqualité
- 4) défaut
- 5) travail inutile (de conception)
- 6) exigences non satisfaites
- 7) gaspillage
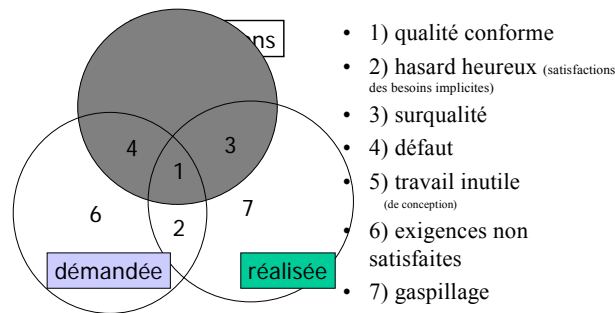
Fig. 3

Si on tient compte du, bien connu graphique de Juran (fig.4) "coûts des pannes et coûts de prévention des pannes" on peut définir la *qualité optimale* comme étant la zone située autour du point correspondant aux coûts minimums, zone comprise entre la sous qualité et la sur qualité. A notre avis c'est justement dans cette zone que doivent opérer la plupart d'entreprises certifiées selon la norme ISO 9000 régissant le système de management de la qualité.

Qualité optimale (JURAN)
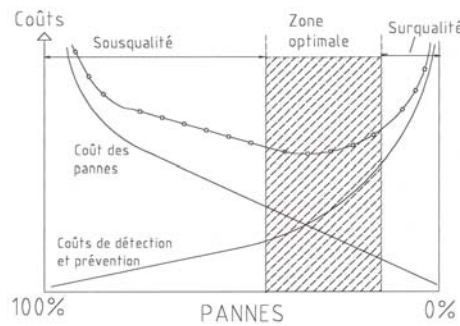
Fig. 4

La *qualité finale* d'un produit ou service se construit tout au long du cycle d'élaboration de celui –ci. Dans chaque étape du cycle intervient les 5M : Main d'œuvre, Machine, Méthode, Milieu (environnement, management), Matière première. Tout « M » pris individuellement, peut être le siège de déviations ou d'écarts par rapport à ce qui sera attendu. C'est ainsi que la qualité finale d'un produit ou service dépend de la qualité de chacun des 5M en question et qu'il faudra veiller à ce que leur variabilité soit maîtrisée est ramenée à des valeurs aussi réduites que possible.

En fin, on arrive au concept de la *« Qualité Totale »* qui représente plutôt un état d'esprit qu'une notion, d'où la difficulté de la définir.

Dans une représentation graphique de la gestion de l'entreprise sur trois axes –technique, économique, social - de l'évolution historique des trois concepts de la qualité à savoir : le contrôle technique CT, l'assurance qualité AQ, la qualité totale QT (fig.5), on voit clairement que le dernier apparu – la qualité totale- prend en considération l'importance de l'homme, de l'individu, en le situant au même niveau que les composantes technique et économique et cela par opposition au taylorisme ou l'accent était mis, essentiellement, sur les axes technique et économique.

L'évolution du monde socio-économique actuel montre bien que la place de l'homme devienne prépondérante par rapport aux autres aspects de sorte qu'aujourd'hui, tous s'accordent pour dire que la plus grande richesse d'une entreprise c'est bien le facteur social, autrement dit, la qualité des femmes et hommes qui y travaillent et la composent et non pas uniquement son équipement ou son capital financier.
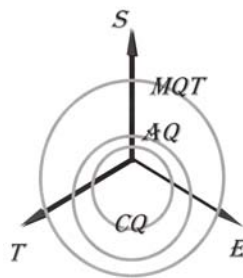
Fig. 5

L'évolution des trois concepts présentés ci dessus (contrôle qualité, assurance qualité, management par la qualité totale) peut être illustrée d'une manière différente, chronologique, sur deux axes : la composante socioculturelle en ordonnée et la composante technique et économique en abscisse (fig.6). On voit qu'avant les années 1960 on connaît et on applique principalement le *contrôle technique* qui par une inspection à 100% de pièces permet d'identifier et de séparer les rebuts de pièces bonnes (le taylorisme) et que ce contrôle se situe en bas de l'axe socioculturel.

Aux alentours des années '70 se développe le concept *d'assurance qualité* qui peut se définir comme « l'ensemble d'actions préétablies et systématiques nécessaires pour donner la confiance appropriée en ce qu'un produit ou service satisfasse aux exigences exprimées concernant la qualité » qui monte un peu sur l'axe social mais pas assez.

Evolution des concepts qualité(1)
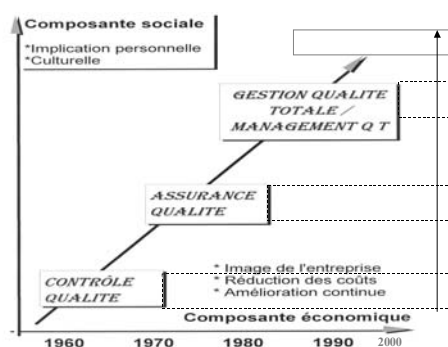
Fig. 6

Après les années '90, l'apparition du concept de *qualité totale* (ou de l'excellence) a permis d'attendre à la fois les hautes valeurs sur les deux axes, économique et social.

Faisons, tout d'abord, deux constatations :

1° - contrairement à ce qu'on pourrait croire il ne peut pas y avoir un management efficace d'une entité sans avoir un solide système d'assurance qualité et sans le contrôle de qualité (les trois concepts doivent coexister) ;

2° - l'esprit qualité totale se caractérise et s'exprime par un management participatif – autrement dit le client interne et externe est roi - en opposition au taylorisme (management vertical) ou le client était plutôt captif.

Quant à la définition, force est de constater que la qualité totale stricto senso n'existe pas ; il n'y a que la tendance asymptotique d'améliorer continuellement l'activité vers le « zéro défaut » qui, en pratique correspond à un « produit parfait ». Le produit parfait avec zéro défaut n'existe pas en tant que tel en réalité, (de ce point de vue on pourra le comparer au zéro absolu de température) sa réalisation entraînerait de dépenses faramineuses et donc, par là, il n'est pas intéressant.

Si dans le cas d'une production rationnelle, on suppose que zéro défaut signifie « réalisé conformément aux prescriptions », ce qui admet d'écarts et même un pourcentage de rebuts, le concept s'approche de celui de «niveaux de qualité acceptable».

Entre ces deux interprétations le concept de *zéro défaut* peut se traduire par *« faire bien du premier coup, toujours et au coût minimum ».* Cette situation exclue le droit à l'erreur donc à la possibilité de pouvoir progresser par l'analyse des erreurs/non conformités et leur remplacement par des solutions meilleures/amélioration continue.

En pratique on peut accepter l'idée : **droit à l'erreur une fois oui, droit à la même erreur deux fois non !**

Plusieurs auteurs considèrent que la ***qualité totale***, c'est le zéro défaut, zéro panne, zéro stock, zéro délai, zéro papier, zéro accident, zéro mépris ; cette approche de la définition a le mérite d'intégrer les aspects de qualité, de sécurité et d'éthique. L'auteur rejoint ce point de vue et va plus loin pour dire que l'ensemble des zéros énumérés plus haut constitue une définition tout à fait acceptable pour le concept/la notion d'Excellence.

A la lumière de ces quelques considérations sur le mot et le concept de la qualité on comprendra, probablement, mieux le sens et la pertinence de la phrase de Juran : *« Le problème de la qualité **n'est pas ce que les gens ignorent**, le problème est **ce qu'ils croient savoir ».***

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CONSIDERATIONS SUR LA MODELISATION DE LA VOIE VERS L'EXCELLENCE A L'AIDE DES OUTILS ET METHODES SPECIFIQUES DE LA QUALITE

Liviu MASALAR*, Université de Liège,* BELGIQUE

Abstract: *A very effective management method, based to the model "way to excellence" will be presented and discussed with the appropriate tools and methods.*

INTRODUCTION

La plupart des gens s'accordent pour dire que le Management de/par la Qualité Totale n'est ni une science ni un art; c'est un ensemble de comportements et de méthodes/outils que tout bon manager « être rare », doit utiliser pour une gestion efficace de son entreprise.

Avoir ou acquérir des comportements adéquats dépend de beaucoup de facteurs, parmi ceux-ci, l'éducation, talent, intuition, inspiration etc. aspects que nous n'allons pas traiter ici.

Cet article sera consacré, notamment, à la partie concernant les méthodes/outils de la qualité dont les contenus peuvent s'acquérir par l'étude assidue des livres ou des traités de spécialité et/ou par la pratique.

La démarche suivie est basée sur l'association de ces outils à la roue de Deming et ensuite, par l'application de l'amélioration continue on va montrer comment réaliser le management efficace d'une entreprise et la diriger vers l'excellence.

Nous montrerons comment faire bon usage de certains outils/méthodes de la qualité, étant donnée que très souvent la littérature spécialisé abonde en nombre et diversité d'informations à ce sujet, sans pour autant qu'un entrepreneur débutant, ou même un plus expérimenté, s'y retrouve facilement.

Toute entreprise engagée dans une démarche de la qualité totale réalise un effort permanent d'amélioration de son activité et cela, dans tous les secteurs, d'une façon continue et par tout le personnel à tous les niveaux hiérarchique.

MODELISATION DE LA VOIE VERS L'EXCELLENCE

La figure 1 visualise un modèle efficace de management d'une entreprise dans lequel on retrouve la cible permanente **- l'excellence** (ou le « zéro défaut »), à laquelle on peut arriver en montant la pente (KAIZEN = amélioration continue), à l'aide de la roue de Deming, PDCA - Plan ,Do, Check, Act ce qui correspond en français à Planifier, Exécuter, Vérifier, Améliorer.
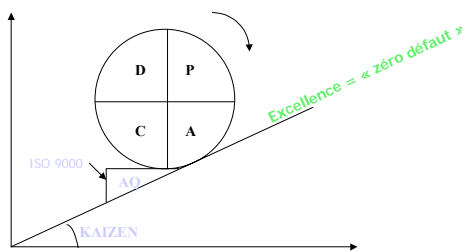
Fig. 1

Pour que la roue avance toujours dans le sens montant de la pente un système efficace de management de la qualité doit être mis en place (une norme, par ex. ISO 9000, un model, par ex.EFQM, un prix, par ex. « Deming – Japon » , « Malcolm Baldrige – USA » etc.) représenté par un coin qui bloque la roue du côté bas.

Conduire et piloter l'amélioration continue se déroule selon la logique du PDCA, c.à.d parcourir les quatre étapes du cycle:

- **planifier** : établir ce qui doit être fait,

- **agir** : réaliser ce qui a été prévu,

- **mesurer** : vérifier et démontrer ce qui est réalisé,

- **ajuster** : corriger selon l'obtention des résultats

Il est vital, après chaque cycle de veiller à stabiliser les progrès ainsi réalisés, de revenir au point de départ et de relancer un autre cycle, ainsi de suite.

Pour faire tourner la roue de Deming (dans le bon sens) il faut la « motoriser », c.à.d. donner consistance a chacun des secteurs PDCA qui la compose pour pouvoir l'entraîner. Cela se fait à l'aide d'outils spécifiques de la qualité qui doivent être choisis et utilisés d'une manière appropriée à l'endroit et moment opportun.

Ainsi, sans trop entrer dans les détails de la description de tous ces outils (la littérature spécialisée est abondante en ce sens) nous allons expliciter dans la suite les composants du « moteur d'entraînement » de la roue.

Pour la partie ***Plan*** = Planifier , qui peut être à son tour décomposée en plusieurs étapes, il est recommandé de faire appel aux différents outils spécifiques. Ainsi pour l'étape ***poser le problème*** on utilisera le **Brainstorming** (remue méninges) ; pour l'étape ***choisir les priorités*** : **Loi de Pareto** (80/20), **Courbe ABC** ; pour l'étape de la ***collection des données*** : **Feuilles de relevés, Histogramme** ; pour ***rechercher toutes les causes*** de la non-qualité : **Diagramme Cause – Effet** (Ishikawa), **AMDEC** (Analyse de Mode des Défaillances et de leur Etat de Criticité).

Pour la partie ***Do*** = Agir, Effectuer, Exécuter, il y a lieu tout d'abord d'utiliser l'ensemble des questions **QQOQCC-PP** = (Quoi ? Qui ? Ou ? Quand ? Comment ? Combien ? Pourquoi ? Pour qui ?) et puis de ***déterminer*** et de ***choisir les moyens.***

Cela se fait à l'aide des outils tels que : **SMED** = (Single minute Exchange of Die) ou **Poka-Yoke** . Ensuite, pour l'étape ***essayer/valider les solutions*** on utilisera la **QFD** (Quality Fonction Deployment = Déploiement de la Fonction Qualité, connue aussi sous le nom de « maison de la qualité » à cause de sa forme) ou la **Méthode des plans d'expériences** (Tagushi).

Pour la partie ***Check*** = Quantifier, Vérifier, dans l'étape « ***contrôler*** » on fera appel au **MSP** (Maîtrise Statistique de Processus, connue aussi sous le nom anglais de **SPC** – Statistical Process Control) tandis que dans l'étape « ***interpréter - évaluer***» on fera appel aux outils tels que: **Feuilles de relevées, Histogramme, MSP, Methode des plans d'expériences** (Tagushi).

Quant à la partie ***Act*** = Réagir, Améliorer il y a lieu de faire appel, dans l'étape « ***corriger*** », aux outils tels que **AMDEC** et **Méthode de Tagushi** alors que dans l'étape de ***prévention des difficultés*** l'outil le plus efficace s'avère être l'AMDEC.

La signification de certains mots d'origine japonaise tels que *Poka –Yoke* ou *Kaizen* ou d'abréviation anglaise *SMED* sera donnée ci dessous.

Le *Poka Yoke* désigne un dispositif anti-erreur simple et peu couteaux. C'est un détrompeur qui permet d'éviter préventivement les erreurs, il peut être mis en place dés la conception ou dés qu'une erreur humaine est constatée.

Kaizen signifie : amélioration continue. Le *Kaizen* représente une stratégie efficace de penser et résoudre les problèmes pas à pas avec la contribution de tous.

Le KAIZEN (KAI=changement, Zen=bon,amélioration)

Modèle Europe (occident): innovation uniquement

Modèle au Japon : innovation + Kaizen (équipement et
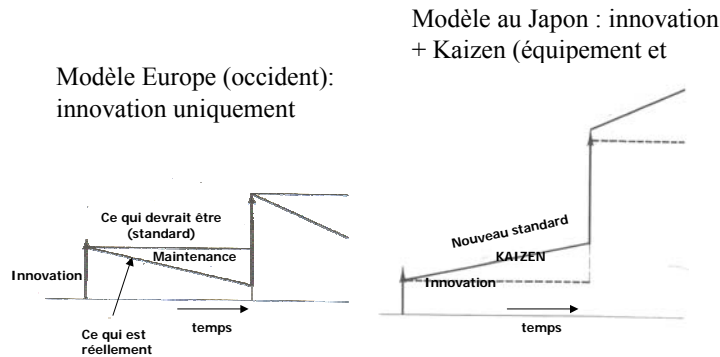
Fig. 2

Il se distingue de l'innovation qui propose des bonds en avant et des percées technologiques qui nécessitent des investissements importants.

Cette approche réaliste a été développée par Masaaki Imai à partir de l'expérience japonaise.

La figure 2 explicite la différence essentielle de la pensée managériale traditionnelle en occident et au Japon. L'efficacité démontrée du Kaizen fait qu'aujourd'hui tout le monde s'efforce d'appliquer cette méthode (c'est la raison pour laquelle la version de la norme ISO 9000 – 2000 en tient compte tout particulièrement).

Méthode SMED. Le SMED est une méthode d'organisation qui cherche à réduire de façon systématique le temps de changement de série, avec un objectif quantifié.(norme AFNOR NF X50-310).

Pour un fabriquant, la réduction des tailles de lots et le souci de répondre rapidement aux demandes du marché, rendent indispensable la maîtrise des changements de série rapides.

SMED signifie Single Minute Exchange of Die, c'est-à-dire Echange d'outil en moins d'une minute (en principe). En pratique industrielle *Single Minute* signifie que le temps en minutes nécessaire à l'échange de l'outillage doit se compter avec un seul chiffre.

Il existe, évidemment, d'autres outils et méthodes de la qualité tels que:

Benchmarking, = se comparer aux meilleurs pour s'améliorer,

Balanced score card, = un tableau de bord équilibré et prospectif, un levier de la performance. « *C'est l'association d'une « feuille de route » et d'un « tableau de bord de performances équilibrées » qui doivent être supportés par le Top Management de l'organisation afin d'être déployée avec succès »*. (d'après R.S.Kaplan de Harward Business School)

Reengineering, = *« une remise en cause fondamentale et une redéfinition radicale des processus opérationnels pour obtenir des gains spectaculaires dans les performances critiques que constituent aujourd'hui les couts, la qualité, le service et la rapidité »*,

(selon M. Hammer et J. Campy).

Six sigma, = c'est une méthode très puissante et à la fois une stratégie qui a permis le passage de la production - approche *pourcentage des rebuts* à l'approche *ppm (pièces non conformes par million)*

- *Les 5 S,* etc.

Une ou plusieurs de ces outils/méthodes sont ou peuvent être utilisées d'une manière efficace dans le management des entreprises en voie vers l'excellence. L'espace consacré à cet article ne permet pas le développement approfondi de tous ces outils ou méthodes.

Cependant, nous allons expliciter l'une parmi celles ci, à savoir, la **méthode des « 5 S »** qui**,** de l'avis de l'auteur, est une technique de management indispensable, très simple et particulièrement efficace. C'est la première pratique de la qualité totale et de la voie vers l'excellence ; très connue et appliquée d'abord au Japon, puis elle s'est repandue en Europe et en Amérique. Il est conseillé aux managers, intéressés par un management qui les conduira vers excellence de commencer par celle-ci et de l'appliquer sans relâche. La méthode des **5S** est applicable dans tous les secteurs de l'activité humaine : entreprise, maison, école, etc.

D'origine japonaise, elle tire son nom des premières lettres des mots japonais : *seiri, seiton, seiso, seiketsu, shitsuke,* qui ont été traduits en français respectivement par : *débarras, rangement, nettoyage, ordre et rigueur*. Leurs signification sera détaillée ci dessous :

- *Seiri* = **Débarrasser ce qui est inutile** veut dire de garder strictement ce qui est nécessaire et se débarrasser du reste. C'est lutter contre le penchant naturel de l'homme de tout collectionner et accumuler (hamster).
- *Seiton* = **Ranger les choses selon leur utilité** suppose de placer les choses qui restent en ordre à leur place pour qu'elles soient facilement accessibles afin d'éviter des gestes inutiles et les pertes de temps pour les saisir au besoin. « Une place pour chaque chose, chaque chose à sa place ».
- *Seiso* = **Nettoyage** assure la propreté du lieu de travail et en même temps permet la détection des anomalies et des défauts. " Cleaning is checking ou Nettoyer c'est inspecter".
- *Seiketsu* = **Ordre** ce n'est pas une activité proprement dite mais c'est de **maintenir un aspect agréable** et durable au poste de travail par l'application régulière des trois étapes précédentes.

- *Shitsuke* = **Riguer** consiste à encourager et motiver le personnel à garder ses bonnes habitudes afin d'améliorer de façon continue les règles pour renforcer l'efficience et s'adapter aux exigences nouvelles. Il ne faut pas laisser de place à la dérive, la hiérarchie doit continuer à expliquer ou réexpliquer la démarche et surtout ce qui a été mal compris pour pouvoir travailler dans un environnement de qualité plus accueillant, plus propre, plus sûr, plus agréable.

La méthode des **5 S** produit des résultats spectaculaires et incontestables contribuant à l'amélioration de la productivité de la sécurité et de qualité de vie. Parce que la méthode transforme physiquement l'environnement du poste de travail, les gens travaillent dans de meilleures conditions. Ainsi elle agit profondément sur l'état d'esprit du personnel tous niveaux hiérarchiques confondus, contribuant à l'augmentation de l'efficacité et du bien être du personnel entier qui se répercute positivement sur l'entreprise et sur la famille. Force est de constater qu'elle est très simple à formuler mais…beaucoup plus difficile à mettre en œuvre.

CONCLUSION

Il est facile de constater que bien des gens prétendent faire de la qualité sans utiliser ni outils ni méthodes. Il ne viendrait pourtant à l'idée de personne de tenir une comptabilité sans appliquer les règles comptables, de bâtir sans respecter les méthodes de construction, de pratiquer des opérations chirurgicales sans outils adéquats. La qualité n'est pas un métier mais « quelque chose » qui s'applique à un métier. En ce sens, elle se rapproche de la politique. Il n'y a pas d'école pour devenir Député ou Président, mais on voit bien que ceux qui réussissent sont ceux qui connaissent les ficelles, donc qui utilisent les méthodes et les outils de la politique. Il est donc judicieux de connaître et d'utiliser les méthodes et les outils de la qualité pour réaliser des améliorations continuées et d'être en marche vers *l'EXCELLENCE*. Cela vaut aussi bien pour les *salariés* que pour les *managers*.

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NOTES ON THE ROLE OF PUBLIC MANAGEMENT REFORMS IN THE EU ACCESSION

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Introduction

The history of Central Eastern Europe swarms with turning points. For the last time, following World War II, - it is an interesting historical coincidence - Europe was severed along the Elba-Saale and the Lajta Rivers, following the borders of the Carolingian Empire which existed more than a thousand years ago.

By 1990 Europe was divided; its western part lived in a greater or lesser symbiosis with the United States, while its eastern part had a similar relationship with the Soviet Union.

In the 1980's the communist world was haunted by a ghost, it was the ghost of democracy; in Central Eastern Europe socialism reached its final point of its historical existence, central planning and total state control came to be defeated.

In the 1990's the countries with a developed market economy followed the path of intensive technological development, as a consequence of which the countries of the world were faced with the task of developing competitive economies operating under extremely strict conditions, having to meet very tough requirements.(Weidenfeld, 1992)

This competition is qualitatively different from all the earlier competitions; its strict precondition is to carry out the greatest technological changes experienced by history so far.

This enormous change – usually embracing a whole historic era – is unfolding itself at a breathtaking speed and is characterized by a rapid acceleration. The difference between the distance covered already and the potentials of the near future has already opened the gap of development wider than ever between the developed and the developing countries. In other words, the so-called

technological, organizational and information gap among them has increased substancially. May I add that those are the real losers who are unable to jump onto the track of development even in a belated manner for they are bound to undertake the risk of lagging behind completely.

Studying the development path of the societes which proved to be successful in the past decade it comes to light clearly and in a way that can hardly be doubted that those nations were successful who tried to improve economic competiteness with the involvement of socio-political factors.

The core task of a modernisation strategy is the improvement of public education, public health care system and last but not least the development of administrative capacities.

In the 90's there have been fundamental changes in the economic, political and legal environment of the public administration in the Central and Eastern European countries.

In economic terms the basic turmoil has been to move away from centrally planned, so called command economies, towards market-oriented economic systems. In political and legal terms the principal development has been the collapse of a totalitarian or an authoritarian political system and the emergence of a pluralistic, multi party system based on a constitutional state. Those fundamental changes required basic shifts in the functions of the state and a comprehensive reform of the public administration. In the first place there were essential changes in the functions of the state. The functions of a typical socialist state were abandoned and new functions had evolved.

1. Reform and Modernization of Hungarian Public Administration. The first phase

Creating democratic legitimacy set the stage for administrative reforms. In the first stage, the basic task was to set up an administrative framework that would be compatible with the principles of a pluralistic parliamentary democracy and of a market economy. In the second stage, the main focus of the modernization was the development of material and personnel capacities in a new type of local and central public administration which could support the development of the bases of a market economy.

The first phase of modernization occurred between 1989 and 1992. The second stage began in 1992 and the third stage began in 1997 and still has not been completed.

In the first phase there were fundamental changes in the economic, political and legal environment of the public administration. In economic terms the basic thrust has been to move away from centrally planned, so called command economies, towards market-oriented economic systems. In political and legal terms the principal development has been the collapse of a totalitarian political system and the emergence of a pluralistic, multi party system based on a constitutional state. Those fundamental changes required basic shifts in the functions of the state and

comprehensive reform of the public administration. In the first place there were essential changes in the functions of the state. The functions of a typical socialist state were abandoned and new functions had evolved. These fundamental changes regarding the functions can be characterized as follows (König, 1992):

FUNCTIONS OF THE STATE

Before transition	**After transition**
Organizing the economy	Providing the legal framework
Cultural - educative	Less emphasis on ideology
Integrate the society	Restoration of the civil society

There were essential changes in the day to day work of the state. Its tools for functioning have changed. The process can be illustrated as follows:

Before transition	**After transition**
Instruments of "etatism"	Social - market Mechanisms
Personal with political-ideological loyalty	Civil service requirements
Democratic centralism	Power distribution horizontally and vertically
Party solution	Legal and economic regulations

Fundamental changes of the political system (e.g. citizen rights, freedom of the press, guarantee of the right to association, electoral system), the establishment of a market oriented economy and institutions for ensuring the development of a democratic society, were emphasized in the comprehensive reform of public administration. This reform was associated with democratization, pluralization and economic liberalization.

Reform of Public administration had included:

- Reinforcing the institutional system for a social market economy (i. e. establishing organizations to manage state-owned property and modernizing the banking system);

- Adapting the functions and tasks of the state administration to the requirements of a market economy;

- Substantial decentralization and reinforcing the right of local governments to independently and democratically manage local public affairs;

- Deregulation, debureaucratization, and rationalization of the public processes.

2. The second phase of modernisation. The injection of managerialism. 1992-1997

2.1. After the first phase of the modernization it turned out that the performance of the public sector was a crucial factor in Hungary. It became increasingly accepted now that public sector performance was one component of the overall performance of national economies not only because of its direct impact as a buyer and seller of goods and services but also because of its indirect effects on product and labor markets. Poor administration and inadequately conceived or unnecessary regulations could substantially burden the private sector and voluntary activity of nonprofit organizations. From that point of view the improvement of infrastructure, the quality of *public* services, and the performance of *public* administration became key long-term factors of economic recovery and modernization.

In addition, in this knowledge intensive era of public administration and public service systems should not be protected areas of the economy anymore. The public systems of each nation - from educational and social security systems to administrative structures-now find themselves in competition with each other. This means that the efficiency and effectiveness of public services have an essential impact on international economic competition. It is obvious that Hungary must strengthen her abilities to catch up with the more established economic powers and that one of the crucial determinants of success will be the relative efficiency of the public sector. How effectively Hungary fulfills her responsibility for social programs, health care, the education of the workforce, and housing will help determine the ultimate international competitiveness of the Hungarian economy.

Historically, there are two types of systematic transitions to a market economy. The first is the market-led, evolutionary type - we can call it the "organic" type. This was the road followed by Great Britain, the first industrial nation, and later by the United States, France, the Netherlands, Belgium, and the Scandinavian countries. In this type of transition, the state did not have a dominant role; rather it merely facilitated development. The second is a functional, state-led transition, in which the role of the state is decisive, especially in the beginning. In this type of transition, the state assists the private sector in many ways. It creates the overall legal and economic framework for the transition and also serves as a major economic agent. However, even though the role of the state in functional transitions is critical, the state does not usurp the place of the private economy. The performance and the commitment of society to the transition are decisive in the long run. (Feinstein, 1990; Jenei, 1999/a).

The current period of transition in Hungary is clearly not of the organic type. Although this type of transition is attractive, the conditions necessary for it do not exist in Hungary. Hungary started from a more unfavorable base. Moreover, there are serious political pressures because of the

external impact of high living standards in the Western world, and the internal expectations and illusions of the population. Thus, the people of Central and Eastern Europe are not willing to wait for the lengthy period of time required by an organic transition. Therefore, the state has important tasks in the transition.

The list of tasks are as follows:
- In fiscal and monetary policy, the state must control the money supply and assume responsibility for the government's budget.
- The state must develop the necessary infrastructure (railways, telegraphs, steel, electricity etc.).
- The state must provide extensive aid and encouragement for internal entrepreneurs in the private sector through tax concessions and allowances, low interest loans, grants, and subsidies. It must promote competition and eliminate restrictive practices. Finally it must develop strategies for industrial development, stimulating the import of foreign technology and helping to restructure declining industries.
- The state must develop policies for immigration, policies for labor supply, policies for worker participation, legislation determining the rights of trade unions, welfare policies, education and training policies, policies for prompting research and development, and policies for improving standards in sciences and technology.

The most important elements of the implementation of managerialism include:
- Decentralization of decision-making to the regional and local level, providing genuine legal and financial autonomy for local institutions;
- Deregulation reforms that make the long, complicated laws and regulations understandable to the public;
- Transforming and flattening public organizations so that they are not only reactive, but also proactive in connection with changes in public requirements and demands;
- Changing procurement policy, financial, human resource management, and information systems in public organization so that government agencies can work more effectively to develop new forms of cooperation with the non-governmental organizations and the private sector and give more attention to the citizens they serve;
- Measuring the performance and the outcomes of public sector activities by reviewing and monitoring, rather than by commanding and controlling.

3. The third phase of modernisation. 1997-
/EU accession and administrative capacities/

In this phase it became quite obvious that the performance level of the civil service has had decisive impact not only on the economic competitiveness but also on the political stability as well.

In the Western democratic systems the legitimacy of modern democratic states comes from the commonly accepted and institutionalised rules of democratic processes. On the other hand, the most visible and important trend in modern public administration is its pursuit to improve the efficiency and effectiveness of its operations. In many cases this desire to achieve better quality outcomes tempts public administrators to depart from existing legitimate processes and institutions in such a fashion that would weaken, perhaps sometimes even endanger democratic processes.

In such Central- and Eastern European transitional countries as Hungary public administration has had to face special challenges because the creation of a political democracy and the implementation of the principles of efficiency and effectiveness have become crucial tasks of modernisation at the same time.

Since the early 1990's more fundamental changes were introduced in public administration in terms of private management methods and the commencement of an overall effort to reduce the scope of the state. This has resulted in a completely new situation. The increasing economic, political and social pressure on public administration has forced bureaucrats to consider the requirements of legalism and managerialism at the same time. This has resulted in tensions and uncertainties within Hungary.

The Hungarian public administration faces new challenges which require new approaches in the day-to-day running of services. There have been fundamental changes in both the economic and political, and the social environment of public administration. The economic and political environment has become increasingly complex, as society, and the economic and political interests and institutions have become increasingly fragmented. The modernisation process caused dramatic changes in the social character of the country with greater diversity in the population, increasing income disparity, changes in family structure and lifestyles, and growing safety concerns. The transition has brought many economic, political, and social difficulties, which have placed a special burden on public administration.

Thus there are many pressures and challenges facing public administration. For instance people are losing confidence in all institutions, while at the same time every institution is faced with pressures on its resources and budgets. There is also a continuing push for more "direct" democracy as well as more opportunities for participation. These trends are accompanied by decreasing respect for traditional instruments of "representative" democracy. Under these circumstances, reacting in an oppressive way, or trying to minimise problems will only serve to harm the credibility of public administration, an institution already viewed with considerable scepticism. (Jenei, 1999/b)

Apart from that the implementation of the standars and values of the European Administration Space has had great challenges for the Hungarian public administration. These administrative principles are not formalised "acquis", but more than a code of ethics. They are legally defined containing certain set of civil service standards and values actually, transmitted by law (Constitution, acts of Parliament or by-laws). They are considered to be common trends and features, not a particular, national organisational model of civil service.

The main administrative values are as follows:

- Reliability, Predictability (legal certainty). Rule of law (Rechtsstaat) against arbitrary power, cronyism, bribery, corruption;

- Openness availability for external scrutiny); Transparency (the examiner can "see through"). Necessary instruments for the rule of law against maladministration, secrecy;

- Accountability, (answerability for the actions, protecting both the public interest and the rights of individuals as well). The possibly supervisory institutions: courts, prosecutor, ombudsman, internal and external audit, inspectorates, standard-setting authorities, parliamentary committees, the media;

- Efficiency (Managerial value, good ratio between resources and results);

- Effectiveness (performance in achieving the goals and solving the public problems).

In the implementation of the administrative principles there are day to day tensions:

- between professional integrity, political neutrality and professional loyalty;

- between autonomy, discretional decisions of civil servants and the rule of law (Rechtsstaat, Etat de droit);

- between legalism and managerialism.

Facing the internal and external challenges the Hungarian public administration has to evolve comprehensive and substantional public management reforms. The main components of these reform efforts were and are as follows:

- Catalytic Government:

  Steering Rather than Rowing

- Community-Owned Government:

  Empowering Rather than Serving

- Competitive Government:

  Injecting Competition into Service Delivery

- Mission-Driven Government:

  Transforming Rule-Driven Organisation

- Results-Oriented Government:

       Funding Outcomes, Not Inputs

4. Conclusion

4.1. Service orientation has became an integral part of the modernisation of the state and public administration. Quality improvement is not only a managerial issue but it belongs to the establishment of "Rechtsstaat" the rule of law as well. Before the transition, the great and the small public service systems delivered by the state were essentially benefits. Socialist democracy was also emphasised but in this democracy the expectations and requirements of the social groups were artificially created by the ruling elite. Therefore the demands of the "bottom" were created by the "top". In other words it was a "top-bottom" approach. Thus the experiences of quality models in CEE cannot be evaluated without the establishment of a service orientation in the framework of constitutional state and pluralistic political system.

Without a radical and clear cut transition toward democracy we cannot speak about service delivery. They are only benefits.

A genuine service delivery can be implemented only on the basis of a political system where:

- the human right of the citizens are guaranteed constitutionally and in the practice as well;
- there are channels in the system for interest articulation of the different social groups;
- there are institutions for achieving compromises among the different and in many cases controversial interests.

Additional remark: the interpretation of "customer" instead of "citizenship" can be twisted on another way in the countries of CEE. The state-customer relationship can have a meaning which is totally different from the Western countries, when "customer" is equivalent with the "beneficiary" and than we can speak about the benefits of a paternalistic state instead of a customer orientation based on requirements of the social groups.

In the CEE countries creating democratic legitimacy set the stage for administrative reforms. In the reform and the modernisation of public administration the first stage was to set up an administrative framework that would be compatible with the principles of a pluralistic parliamentary democracy and of a market economy. This phase is basically over – with a few deficits – in some CEE countries, but some of the CEE countries could not complete this stage of modernisation.

In the second stage the main focus of the modernisation is the development of administrative capacities which provide the opportunities for competition. (Jenei, 1999/b) It is the requirement of

the EU accession but generally speaking, the ability to compete is the requirement of the current technology and knowledge intensive phase of economic development.

Isolation and dependency cannot be avoided without the development of a performance orientation in the public sector. Nowadays the performance level of public service systems is a crucial component of the economic competitiveness. In other words public service systems have become integral part of the competition. In the countries of CEE are under the pressure of external constraints as well. The role of external constraints is obvious when you have the ambition not to establish a Museum of Outdated Techniques from your country.

But the role if internal constraints is not always quite clear. However poor administration and inadequately conceived or unnecessary regulations could substantially burden the private sector and voluntary activity of non-profit organisations.

Thus the improvement of the infrastructure, the quality of public services ad the performance of public administration have become key factors not only in the modernisation of the public administration, but of economic recovery and modernisation as well.

4.2. Even in the EU countries there are tensions between the administrative principles. There is a broadly discussed tension between the principles of professional integrity and professional loyalty. And a well-known consequence of customer orientation, quality improvement and application of management techniques is the tension between legalism and managerialism. In the EU the development of the "Rule of Law" and the introduction of "New Public Management" was a sequential process. (Even in this development tensions are well-known)

Compared to this there is an essential difference in the CEE countries, namely that these countries had in the early l99O's just established the legal and organizational framework of a "Rechtsstaat" and shortly after this they also got the challenge of introducing managerial systems and techniques in the public sector. Basically the development of the "Rule of Law" and of the "New Public Management" have become a parallel process. It means that the real danger in the region is not a tension between legalism and managerialism, but a fragmentation.

Creating a legal – organizational framework for a "Rechtsstaat" does not mean that it is already a functioning legal state based on Weberian principles. But without a functioning Weberian democratic system the consequence of the initial steps of "New Public Management" is corruption. It means that the quality models pave the way to the direction of corruption.

On the other hand without introducing the quality models the CEE countries cannot increase the competitiveness of the public sector which is an essential component of the economic, social and political modernisation processes of these countries.

Are we really in the trap situation? Is it a dilemma which cannot be solved?

The only solution is that the CEE countries do not try to avoid the Weberian phase of development. A functioning Rechtsstaat is a necessity in the course of modernization but you have to add to this development the application and implementation of the western quality models as well. You need a balanced position and public administration needs a stable political background and strong consensus of the political parties in supporting this process.

Another precondition of the transferability is that each CEE country has to find its own way in developing its own system. It was already mentioned the public administration system of the EU countries are not compatible. They cannot be copied or mechanically transplanted. You can only absorb their experiences when you have a realistic evaluation on the current situation of your own countries. And you have to take into consideration that knowledge has always its cultural connotation.

To make a selection from the experiences of different models is a possibility but you can be sure that the consequence of it will be a combined mistake instead of a relevant synthesis.

A certain quality model developed by a local government or by a school or a health care institution can have a great impact on the development of quality models in the CEE countries. It happened among the Western countries as well. A famous example of the impact of the Tilburg model to the German local governments. The "Neue Steuerungsmodel" was initiated in the German local governments following the suggestions and recommendations of the Tilburg model. It is interesting that in Tilburg they evolved a model and apart from it they created an export product which was not implemented in their own city but it had a positive impact in Germany.

The third precondition of transferability is the clear understanding of the main function of the different quality models. You need a clear notion of what you are going to implement.

4.3. It is obvious that all organizations in the public sector have to adjust and accommodate to the changing circumstances. These changes occur rapidly and in many cases they are unpredictable. Therefore, public organizations need to be stable and to be able to keep up with the changes. The requirements for public service management are very complicated. Civil servants need new managerial skills and new types of managerial attitudes and values, but at the same time, they must preserve their traditional strengths.

In Hungary, an essential component of public sector reform is to establish new values and attitudes among public officials. A new type of civil servant is needed, one which can be protective when required, but who can also work as a partner and a manager when necessary. The ideal personal profile of such a civil servant which was not present before the transition includes the following characteristics: Productive and efficient, empathetic, tolerant, reliable, responsible, loyal (but not subservient) positive toward people and problems, neutral toward political parties, creative and resourceful, constructively critical, respectful, helpful and courteous, flexible cooperative, cooperative.

How many civil servants now work according of these standards? How many are motivated by these values seems obvious that the majority of the civil servants are not. In addition, the following managerial skills are needed for improvement in the performance of the public sector: Thinking strategically, taking initiative, working under pressure, accommodating risk managing resources and people, effective delegation of tasks and responsibilities, prioritization, cross-cultural understanding, ability to work with new technologies communication skills, speaking foreign languages.

These attributes define the ideal type of civil servant. The conditions that must be met, if civil servants are to possess the values and technical skills listed above are as follows:

O*n the individual level:*

Work that civil servants can identify with, appropriate working conditions, the rational share of competence, salaries which provide a decent standard of living, social support (support in housing for example), Career opportunities for advancement.

On the group level:

A favorable psychological atmosphere for working groups in the organization, leaders who exhibit a clear and cooperative style.

On the organizational level:

Clearly-defined and accepted organizational goals, an operational cooperation among the divisions of the organization, a well-operating, modern information system, practical results.

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QUALITY FUNCTION DEPLOYMENT (QFD)
FOR ELECTRIC POWER

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Abstract: *This study aims to find the ways to analyze and improve a special structured product – the electric energy- using the Quality Function Deployment (QFD) techniques.*

This paper is unique for the two new concepts created by the authors: that of the functions of electric energy and that of using the phases of the production, transportation and distribution process of the electric energy as technical characteristics.

The conclusions suggest new possibilities of approaching the energy management, using the QFD concept.

Introduction

One important moment in the evolution of the quality concept was the application of the quality control in the development of the products, that is the guarantee of the quality in the early activity of an industrial unit.

Quality Function Deployment (QFD), also known as The House of Quality, is the best device ever created to tie product and service design decisions directly to what the customer wants and needs.

Quality Function Deployment (QFD) is a methodology for listening to the Voice of the Customer and using that information to drive aspects of product development.

Quality Function Deployment (QFD) is a structured approach to defining customer needs or requirements and translating them into specific plans to produce products to meet those needs.

Some of the benefits of adopting QFD have been documented as:

- Reduced time to market

- Reduction in design changes

- Decreased design and manufacturing costs

- Improved quality

- Increased customer satisfaction.

1. QFD Methodology flow

The basic Quality Function Deployment methodology involves four basic phases that occur over the course of the product development process.

During each phase one or more matrices are prepared to help plan and communicate critical product and process planning and design information. This QFD methodology flow is represented below. These four phases are:

1. product planning:

   - define and prioritize customer needs;

   - analyze competitive opportunities;

   - plan a product to respond to need and opportunities;

   - establish critical characteristics target value;

2. assembly/part deployment:

   - identify critical part & assemblies

   - flow down critical parts characteristics;

   - translate into critical characteristics & target values;

3. process planning:

   - determine critical process & process flow;

   - develop production equipment requirements;

   - establish critical process parameters;

4. quality control:

   - determine critical part and process characteristics;

   - establish process control methods & parameters;

   - establish inspections & test methods & parameters.

FOUR-PHASE QFD APPROACH
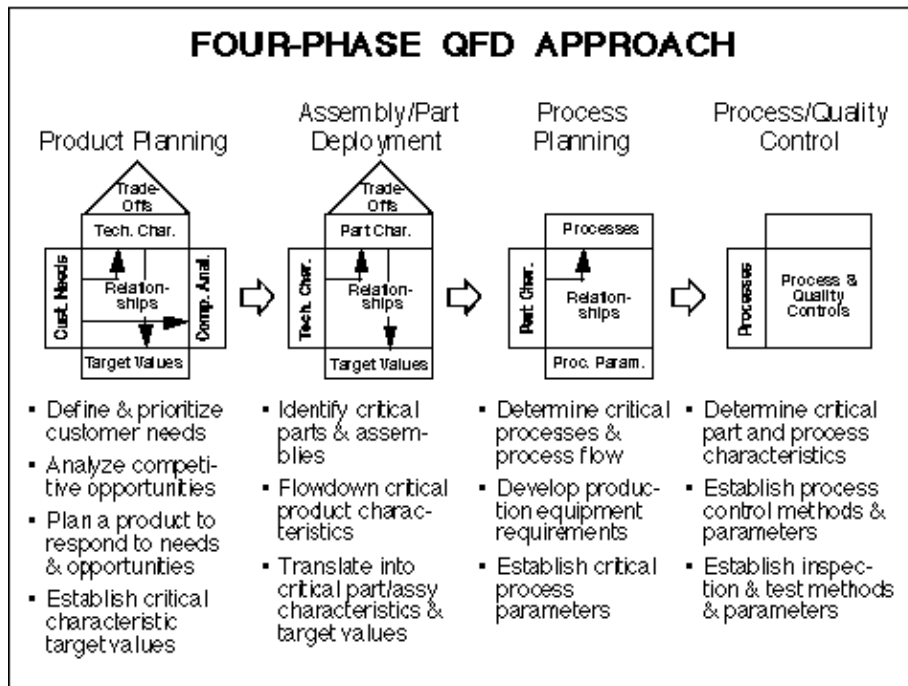
Quality Function Deployment Product Planning Matrix

As a graphic support of the QFD-method is being used a diagram called House of Quality. This House of Quality is presented below:
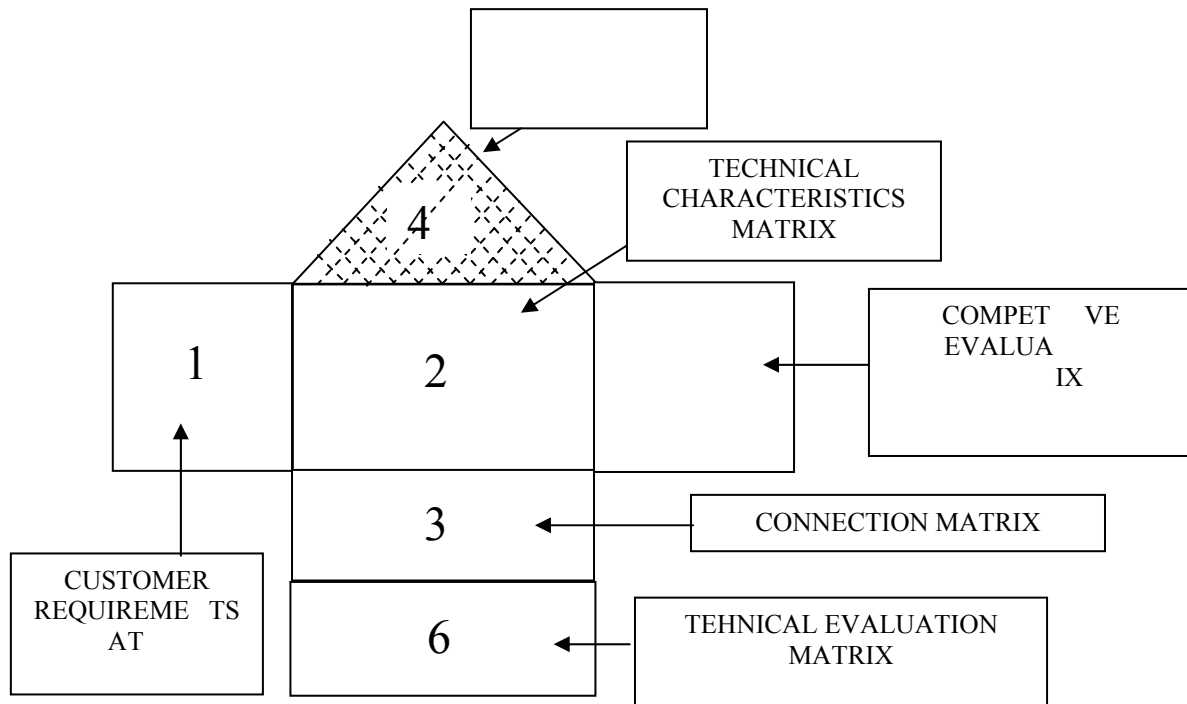
House of Quality parts

The most difficult of the House of Quality parts is Customer Requirements Matrix because it requires the procurement and collecting processing of a great quantity of information from many sources.

2. House of Quality- for electric power

This chapter shows an application of QFD method for electric power.

a. Customer Requirements Matrix

At the beginning, establish the functions of electric power (customer requirements) and then their weight, as follows:

1- the least important ; to 5- the most important.

Customer Requirements Matrix

Nr. crt.	Sb.	Functions	Weight
1	F1	The use of electric power must not cause butts.	4
2	F2	Electric power must be measured with accuracy.	5
3	F3	Electric power must be distributed economically to a large number of customers.	4
4	F4	Electric power must change in other forms of energy (heat, electric light).	3
5	F5	Electric power must be distributed quickly and economically to all ~~large~~ distances.	3
6	F6	Electric power must be produced on any emplacement comply with technical and economical view.	4
7	F7	Continuity	5
8	F8	Built-in reliability	5
9	F9	Plant and people safety.	5
10	F10	Environment protection.	3
11	F11	Electric power must be of quality on delimitation point between purveyor and customer.	4
12	F12	Electromagnetic compatibility between pant and environment.	4
13	F13	Electric power must be obliging (a service asked by customer).	5
14	F14	Electric power must permit the measurement of quality level in a network knot.	4
15	F15	Electric power must bring to customers an alternating tension voltage with frequency and effective value, maintained in some limits.	3

b. Technical characteristics matrix

This matrix presents electric power characteristics on the three phases of energy (energy production, transport and energy distribution)
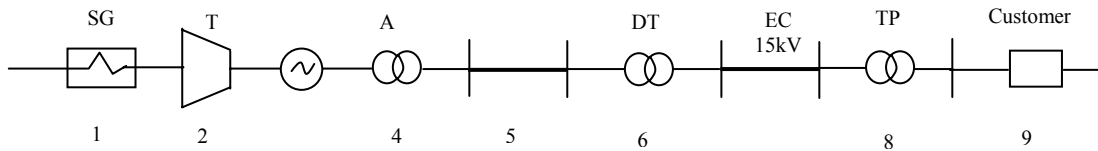
Electric power phases

1- fuel (SG- steam generator);

2- mechanic energy (T- turbine);

3- electric power on production parameters (G- generator);

4- ascent transformer (RT) ;

5- transport;

6- descent transformer;

7- electric cable (EC);

8- transformation post;

9- customer.

Technical characteristics matrix

Sb	C1	C2	C3	C4	C5	C6	C7	C8	C9
Naming	fuel	mechanic energy	Electric power on production	Ascent transformer	transport	Descent transformer	Electric cable	Transformation post	customer

c. Correlatation matrix
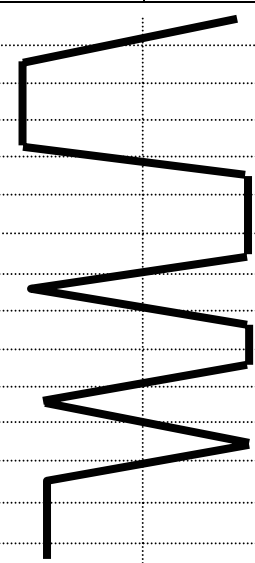
In this matrix is being used the next correlation:

+2- strong positive relationships;   to   -2- strong negative relationship.

Correlatation matrix

	C1	C2	C3	C4	C5	C6	C7	C8	C9
C1	-	+2	+1	-1	-1	-1	-1	-1	-2
C2	+2	-	+1	-1	-1	-1	-2	-2	-2
C3	+1	+1	-	+2	+2	+2	+2	+2	-1
C4	-1	-1	+2	-	+2	-1	-1	-2	-2
C5	-1	-1	+2	+2	-	+2	+2	+2	+2
C6	-1	-1	+2	-1	+2	-	+1	-1	-2
C7	-1	-2	+2	-1	+2	-1	-	+2	+2
C8	-1	-2	+2	-2	+2	-1	+2	-	+2
C9	-2	-2	-1	-2	+2	-2	+2	+2	-

d. Conection matrix

It is being use a similar argument:

0- no relationship; 1- weak relationship; 2- average relationship; 3- strong relationship.

Conection matrix

	C1	C2	C3	C4	C5	C6	C7	C8	C9
F1	3								
F2		2	3					3	2
F3			2		1			2	3
F4	1	3							
F5					3				
F6	3	3	3						
F7		3	3	2	2	3	3	3	3
F8	1	1	3	3	3	3	3	3	3
F9	3	3	3	3	3	3	3	3	3
F10	3								
F11			3	3	3	3	3	3	
F12	3	3	3	3	3	3	3	3	
F13									3
F14	3	3	3	3	3	3	3	3	3
F15									3

e. Competitive evaluation matrix

This matrix represents a comparative analysis from the customer's point of view. The analogy has been made between electric power and nuclear energy.

Nr. crt.	Functions	Comparative analysis	
		Electric power	Nuclear energy
1	F1		
2	F2		
3	F3		
4	F4		
5	F5		
6	F6		
7	F7		
8	F8		
9	F9		
10	F10		
11	F11		
12	F12		
13	F13		
14	F14		
15	F15		

f. Technical evaluation matrix

This matrix includes: target value, technical difficulty, importance ratings and technical evaluation.

Technical difficulty: in this way:

   1- for structures too difficult to make;

   3- for structures too easy to make.

Technical evaluation: an analogy between electric power and nuclear energy.

Importance ratings: assign a weighting factor to relationship symbols (1-2-3) and multiply the target value by the weighting factor in each box of the matrix and add the result products in each column.

Technical characteristics		C1	C2	C3	C4	C5	C6	C7	C8	C9
Target value		86	90	116	76	89	81	81	104	103
Technical dificulty	1	■						■		■
	2		■			■				
	3			■	■		■		■	
Importance ratings		86	180	348	228	178	243	81	312	103
Technical evaluation	Electric power									
	Nuclear energy									

Conclusions

Fifteen functions of the electric power have been presented, but the most important functions are:

F2- Accuracy.

F7- Continuity.

F8- Built-in reliability.

F9- Plant and people safety.

F13- Availability (a service asked by customer).

F15- Effectiveness (electric power must bring to customers an alternating tension voltage with frequency and effective value, maintained in some limits.

Technical characteristics of the electric power have been submitted depending on the 3 phases of the electric power (energy production, transport and energy distribution).

In the *competitive evaluation matrix* an analogy has been made between the electric power and the nuclear energy. From this analogy, the most important functions of the electric power ~~are~~ appear to be:

F2- accuracy;

F3- economical distribution to a large number of customers;

F8- built-in reliability;

F11- ability to create a delimitation point between purveyor and customer.

F13- availability (a service asked by customer).

F15- effectiveness (ability to bring to customers an alternating tension voltage with frequency and effective value, maintained in some limits).

In the *technical evaluation matrix* the most important reference points are:

C3- electric power on production parameters- 116.

C8- transformation post- 104.

From the comparative analyse between electric energy and nuclear power, (from the technical characteristics point of view), some technical characteristics are more important for the electric power comparing to nuclear power, as:

C3- electric power on production parameters;

C4- ascent transformer;

C6- descent transformer;

C8- transformation post;

C9- customer.

The most important customer's demands for electric power are:

F2- accuracy;

F8- built-in reliability;

F13- availability (a service asked by customer).

F15- effectiveness or applicability (ability to bring to customers an alternating tension voltage with frequency and effective value, maintained in some limits).

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SOCIAL BALANCE   – AN INSTRUMENT
FOR THE HUMAN RESOURCES MANAGEMENT

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Abstract: *This paperwork presents the theoretical and practical aspects regarding the social balance for human resources analysis in an organisation.*

The analysis of the social balance sheet allows management to seek out different possibilities to increase the efficiency of human resources of the company, with favorable consequences for ł both the activities within the organization and its employees.

Introduction

The social balance notion has been successfully used ever since1977, when it was introduced in France and became mandatory for every organization larger than 300 employees. The first goal of the social balance (SB) is to offer social information to everyone who is interested in the company (employees, management, stockholders, customers and even suppliers).

The SB chart/sheet shows, in the most complete way, the outcomes (positives and negatives) and the quantification of all the efforts spent by using the census of all the actions initiated by the company and the individualisation of all material and financial resources consumed. The goal of SB is to evaluate the results and the methods.

The SB is a chart/sheet elaborated annually consisting of quantitative and uncommented information, expressing the social state and labor (work) conditions within the company.

1. **The drawing ~~up~~ of a social balance**

The social balance contains different kinds of figures: absolute values, rates, statistics, binary and ordinal numbers.

The drawing of a social balance entail the utilisation of same indicators every year, specific indicators for each company, and that grants it a great advantage: pursuing the evolution in time. The social balance is structured in seven chapters, every chapter gathering a succession of indicators. The drawing and the distribution of the social balance follow a number of steps: collecting informations and project preparation, report approval and distribution.

Preparation and elaboration of the social balance is a human resources department task, which normally should possess most of the required information. The final report is approved by the Board.

This report should be a public document accessible for: the management, the shareholders, the employees, and even the business partners. This makes the social balance a public relation instrument, the company proving transparence and availability for social dialog and communication.

Informed employees are more productive because social information is part of work satisfaction and this is a very important issue of performance, both individual and for all the company.

Social balance should be the first step to go in planning all actions performed by human resources department and it should be the image of the company's policies regarding human resources.

The social balance is also useful in establishing the organization′s social diagnosis, being one of the defining elements for the global human resources administrating system, as well as with the social budget and the social board.

The social balance reflects the company state at one moment or for a period of time, but its final purpose is to give the management the opportunity to improve the company performance through establishing costs for some social dysfunctions such as absenteeism, nonquality costs or even work dissatisfaction and social tensions.

2. **Social balance indicators**

Social balance indicators are divided in two categories: structure indicators (they express the state at one moment in time) and performance indicators (they praise movements recorded). The structure of a social balance is almost alike the financial balance. Every category of indicators could be detailed for each company.

3. **Case study: SOCIAL BALANCE INDICATORS FOR S.C."INDUSTRIA SÂRMEI" CÂMPIA TURZII S.A.**

Chap	*Indicator*		1999	2000	2001	2002
1	**Employees**					
1.1	**Personnel**					
1.1.1	Total personnel as of 31.12		5710	5866	5904	5661
1.1.2	Average monthly personnel, relevant year		6122	5761	5951	5724
1.1.3	Gender breakdown of total personnel, as at of 31.12					
	Male	Number	4216	4414	4455	4262
		rate	73.84	75.25	75.45	75.29
	Female	Number	1494	1452	1449	1399
		rate	26.16	24.75	24.54	24.71
1.1.4	**Age groups breakdown for the total personnel, as of 31.12**					
	18-30	Number	1590	1528	1313	1104
		rate	27.84	26.05	22.24	19.5
	31-40	Number	2170	2232	2212	2081
		rate	38.0	38.05	37.46	36.76
	41-45	Number	1058	1085	1162	1128
		rate	18.53	18.50	19.68	19.92
	46-50	Number	775	870	966	971
		rate	13.57	14.83	16.36	17.15
	51-55	Number	109	142	238	358

		rate	1.91	2.42	4.03	6.32
	over 55	Number	8	9	13	19
		rate	0.14	0.15	0.22	0.33
1.1.5	**Average age in the organization**		**36,39**	**36,49**	**37,44**	**37.83**
1.1.6	**Total personnel breakdown by seniority, as of 31.12**					
	0-5	Number	488	640	508	487
		rate	8.55	10.91	8.6	8.6
	6-10	Number	1058	946	687	521
		rate	18.53	16.13	11.64	9.2
	11-20	Number	2264	2184	2390	2245
		rate	39.65	37.23	40.48	39.66
	21-25	Number	1003	1017	1101	1105
		rate	17.56	17.34	18.65	19.52
	26-30	Number	778	812	857	862
		rate	13.62	13.84	14.51	15.23
	over 30	Number	119	267	361	441
		rate	2.1	4.55	6.11	7.8
1.1.7	**Breakdown of total personnel by detailed structure of qualification, as of 31.12**					
	University Education Total	Number	441	418	502	494
		rate	7.72	7.12	8.5	8.73
	Technical University education	Number	347	333	377	369

		Rate	6.08	5.67	6.38	6.52
	University education	Number	95	85	125	125
		rate	1.66	1.45	2.12	2.21
	Foremen	Number	176	162	165	225
		rate	3.08	2.76	2.79	3.97
	Technicians	Number	55	50	59	59
		rate	0.96	0.85	1.00	1.04
	Highschool – Monthly	Number	240	258	251	259
		rate	4.2	4.4	4.25	4.57
	Workers Total	Number	4797	4978	4927	4624
		rate	84.01	84.87	83.45	81.68
	Qualified workers	Number	4768	4577	4819	4598
		rate	83.5	78.03	81.62	81.22
	Qualified workers (Occupational School)	Number	2339	2316	2486	2403
		rate	40.96	39.48	42.11	42.45
	Qualified workers (Highschool)	Number	1294	1329	1297	1209
		rate	22.66	22.65	21.97	21.36
	Qualified workers (Training courses)	Number	1140	1022	1036	986
		rate	19.96	17.42	17.55	17.42
	Unqualified workers	Number	29	401	108	26
		rate	.051	6.84	1.83	0.46

1.2	**Employment during relevant year**	**221**	**485**	**406**	**262**
1.3	**Departures (Leaves)**				
1.3.1	Departures total	1357	325	347	505
1.3.2	Number of resignation	-	-	-	-
1.3.3	Retirement leaves, age limit	107	82	50	62
1.3.4	Retirement on sickness basis	19	18	21	15
1.3.5	Mutual agreement of parties	107	170	229	319
1.3.6	Deaths	10	6	8	14
27	Activity decreases	1041	2	3	27
1.3.8	Professionally unsuitable	40	19	11	9
1.3.9	Disciplinary deviasion and suspensions	33	28	46	59
1.4	**Promotions** **Number**	**624**	**583**	**602**	**576**
	Promotions **rate**	**10,19**	**10,12**	**10,11**	**10,06**
1.5	**Absenteeism**				
1.5.1	Number of days groundless absence days	1350	1438	1588	1538
1.5.2	Number of absence days on grounds of sick and maternity leaves	96354	86568	86196	91602
1.5.6	Number of absence days for family events	1733	2453	2679	2391
1.5.7.	Number of absence days for citizenship obligations	1038	1113	1025	988
1.5.8	Number of effectively worked days	1562500	1515230	1557749	1483756
1.5.9.	Number of total working days (leaves excluded)	1662975	1606302	1649237	1580275
1.5.10.	Number of legal leave days	181022	174312	174168	173850

2	**Wages / Remmunerations and related expenses**					
2.1	**Lump Sum of wages**		**128,53**	**175,707**	**326,989**	**425,672**
2.1.1	Average monthly wage (lei)		1,689,300	2,687,500	4,233,600	5,115,000
2.1.2	Periodical bonuses (billion lei)		2,653	5,233	7,110	10,303
2.2	**Hierarchy of wages**					
2.2.1	The ratio between management personnel wages average and unqualified employees wages average		7,28	7,96	8,8	7,52
2.2.3	Lump sum of highest wages management		0,106	1,68	3,69	5,44
2.3	**Wages calculation method**					
2.3.1	Hourly employees percentage		84.01	84.87	83.45	81.68
2.3.2	Monthly employees percentage		15,99	15,13	16,55	18,32
2.4	Related expenses					
2.4.1	Sick allowances and maternity leaves		5,106	7,287	6,058	10,115
2.4.2	Paid vacations		10,662	14,612	13,401	20,276
2.4.3	Family events leaves		0,092	0,213	0,440	0,922
2.4.4	Retirement indemnisation		0,903	1,101	1,058	1,585
2.5	**Global salaries / wages expenses**					
2.5.1	Personnel expenses		173,807	269,305	466,934	602,391
2.5.2	Added value		296,549	377,014	566,149	558,796
2.5.3	Turnover		892,621	1223,067	2035,111	2451,158
2.6	**Stockholders structure**	APAPS	63,270	63,270	63,270	45,804
		AVAB	-	-	-	27,605

		SIF Banat - Crişana	32,899	32,899	32,899	23,817
		PPM	3,831	3,831	3,831	2,774
3	**Hygiene and safety condition**					
3.1	**Labour and transportation accidents**		**27**	**24**	**29**	**23**
3.1.1	Number of permanent disabilities		1	-	2	-
3.1.2	Number of temporary disabilities		23	24	27	21
3.1.3	Number of disabilities days		1308	1695	2092	1894
3.1.4	Number of dedly accidents		3	-	-	-
3.2	**Occupational diseases**					
3.2.1	Number of denomination for declared occupational diseases		1	1	1	-
3.2.2	Number of employees suffering from pathological diseases of occupational character and their description		1 chronic manganism	1 occupational bronchial asthma	1 bilateral neuro-sensorial hypoacousia	-
3.2.3	Number of statements from the employees that the working processes are predisposed to inflicting occupational diseases		-	-	-	-
3.3	**Health and safety committee**					
3.3.1	The members of the labor Health and Safety Committee : production manager, commercial manager and deputy commercial manager, chief engineers, had of health and safety office, coordinating physician, representative of the Free Union, representative of the Sigma Union, major workshops		15	16	16	17
3.3.2	Number of meetings		4	4	4	4
3.4	**Safety related expenses**		4,911	9,028	17,515	24,601
3.4.1	Safety issues personnel (Health and Safety Office)		6	6	6	6

4	**Other working conditions**					
4.1	Duration and structure of the working time					
4.1.1	Weekly schedule		8h *5 days	8h *5 days	8h *5 days	8h *5 days
4.1.2	Yearly leave average number of days		32	31,7	31,2	30,9
4.1.3	Holidays number of days according to the general Work agreement for all employees		8	8	8	8
4.2	**Work organization**					
4.2.1	Average number of employees holding jobs of	1 shift	750	719	771	791
		2 shifts	4629	4314	4418	4161
		3 shifts	743	728	764	772
4.3	**Working physical conditions**					
4.3.1	Number of analyses of toxic products and measurements		1264	1096	1058	1024
4.5	**Expenses for improving the working conditions**		20,813	18,417	29,561	32,546
5	**Training**					
5.1	**Continuos professional traning – number of people**					
5.1.1	Qualification courses		109	21	68	-
5.1.2	Certification courses		155	125	21	67
5.1.3	Development courses		760	746	1714	1857
5.1.4	Specialization courses		130	279	142	158
5.1.5	Continuos training weight in the employees mass		18,8	20,3	32,68	36,37
5.1.6	Amount granted for continuos training		367,8	459,2	513,7	803,1
5.1.7.	Number of studies contracts		68	72	78	78

5.1.8	Number of employees benefiting from studies leave	6	8	8	12
6	**Professional Relations**				
6.1	Representatives of personnel and union delegates	34	32	32	32
6.2	Information and communication	172	187	190	235
6.3	Labor law enforcement				
7	**Other living conditions depending on the organization**				
7.1	Social endeavors, vacation and treatment packages	0,78	1,33	1,16	1,93
7.2	Other social, cultural and sports charges	1,14	1,40	1,58	2,03

CONCLUSIONS AND RECOMMENDATIONS

The board of the social balance is elected for a 4 consecutive years period, allowing to pursue the evolution of the organization ′s human resources and personnel policy.

• The first chapter ''Employees'' illustrates a continuously decreasing trend of total number of manpower, also the average amount of personnel, with only one exception: relevant year 2001, an election year. Changes made in public administration and governmet were followed by the replacement of all the executive management. As a consequences of the new political orientation, the number of employees grew up. The balance was equilibrated in a very unusual way: the formerly prohibited Schenghen visas became history in 2002, and a large amount of labor hand emigrated to Western Europe, hoping in greater incomes: the departures on mutual agreement of parties was obviously increased compared with 2001 .

• The age, seniority and average age in organization pointed to an alarming fact: the ageing of the personnel. Average age in the organization increased from 36.39 to 37.83 in only 4 years. The cause must be searched in Romanian labor legislation (The social insurance law 19 / 2000), which increased the retiering age, but there are also some social causes: young people choose other professional fields, where they get paid better and find better opportunities for a career development.

• If the increased average age in the organization isn′t a very flattering finding, it is still a good thing that the employees' educational level is continuosly increasing, for all categories (University degrees, foremen, qualified workers) and the rate of unqualified workers is continuosly decreasing (from 6.84 % in 1999 to 0.46 % 2002).

• The absenteeism rate is also worrisome. With all the management efforts and coercion, the absenteeism rate (both the groundless absence days and the ground sick days) is quite high (6.25 % in 1999, 5.8 % in 2000, 5.6 % in 2001 and 6.27 % in 2002). There is a very good explanation for that situation: one gets paid better for staying home (sick) than for going to work, which is both a big flaw of the labor law and a lack of labor culture among Romanian people. the earn is better and you dont work , you stay home . This is one of the most worying things : lack of labour culture .

• The remuneration mass, the average wage and the bonuses mass are continuosly growing, but not enought for covering the inflation rate. The ratio between the management average wage and the unqualified workers average wage varyies randomly , but the management remuneration mass has been growing spectacularly during the 4 relavant years (from 0.106 bl lei in 1999 to 5.44 bl lei in 2002).

- There is a continuos preoccupation for improving the labor hygiene, health and safety condition for employees. The Health and Safety Comittee is involved in investment for improving the work conditions. The number of work accidents and the number of permanent and temorary disabilities decreased in relevant years and there were no deadly accidents within these 4 years.

- No occupational disseases and no testimonies from the employees regarding any procceses to produce occupational disseases were declared.

The new Romanian Labor Code provides special rules for labor health and safety, rules that are mandatory for every employer.

Another interesting aspect is the preoccupation for continuous training.

- Chapter 5 shows that the number of employees who were beneffiiciary of a training form is growing every year : from 18.8 % in 1999 to 36.37 % in 2002. The new Labor Code allotted a special chapter for the personnel training, emphasizing the compulsoriness for the employer to give every employee the oportunity for traning at least one course at every two years. The annual Training Program should cover all training needs for the employees and for that organization.

- Chapter 6 is dedicated to the social dialog indicators and union information activities inside the organization.

- Chapter 7 gathers information regarding the organization′s concerns about social, cultural and sports charges. The organization makes a large allowance every year for covering a part of the vacation and treatment package.

This is for the first time when a social balance is elaborated for Industria Sarmei and up to our knowledge there is no other company in Romania that uses this kind of instrument for the Human Resources Management. The social balance has the great advantages of being that a flexible structure of indicators and of being adaptable to every kind of company. Being elaborated for 3 or 4 consecutive years, the human resources evolution can be watched under all the aspects and it can also identify causes for some of the organization's dysfunctions: inefficiency of labor hand, under training, lack of motivation.

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INTERNATIONAL DIMENSIONS OF THE DIRECT MARKETING DEVELOPMENT: THE ROMANIAN MARKET IN THE CONTEXT

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Abstract: *The paper approaches the most significant coordinates of the development registered by one of the most both controversial and attractive field of the marketing communication conducted by the organizations. The incomes and expenditures and, consequently, the effectiveness of the specific campaigns implemented, the experiences registered in 30 international reference markets may be perceived as cornerstones for the future development of the field in the Romanian market.*

There are a lot of points of view referring to the conceptual and operational contents of the direct marketing. Based on these, direct marketing can be defined as a sum of concepts, techniques and instruments of marketing used in direct, personalized and interactive approaches of the consumer, aiming to generate quantifiable results (direct orders, lead generation and building of the consumer traffic toward to the selling points of the organizations products and services) and to provide the infrastructure for the long-term profitable relationships with customers.

To characterize the direct marketing development in the international markets the most relevant data are provided by the annual study completed by the Direct Marketing Association, including, in a distinctive section, information about the status of the field for 30 markets. These markets are: Germany, United Kingdom, France, Italy, Netherlands, Spain, Belgium, Sweden, Austria, Finland, Denmark, Ireland, Portugal, Greece, Switzerland and Norway (Europe), Japan, Chinese Taipei, Republic of Korea, Hong Kong, Malaysia, Thailand and Philippines (Asia), Canada

and Mexico (North America), Australia and New Zealand (Oceania), Argentina and Brazil (South America) and South Africa (Africa).

The study approaches the direct marketing development considering the following indicators: volume of direct marketing expenditures, volume of business-to-consumer (B-to-C) direct marketing expenditures, volume of the business-to-business (B-to-B) direct marketing expenditures, volume of sales generated by the direct marketing activities, volume of sales generated by the business-to-consumer direct marketing activities and volume of sales generated by the business-to-business direct marketing activities. To relate with the development status of the national market (as well as to have a significant reference), the data provided by the study have been extended through the inclusion of the figures (where available) corresponding to the Romanian market.

The *analysis of the direct marketing expenditures* reveals two distinctive evolutions in the field corresponding to the assessment periods. Thus, between 1995 and 2000, the specific expenditures have decreased significantly, from 235.231 to 189.020 millions US Dollars. The most significant decreases have registered by the Japanese (- 9,01 %), Thai (- 5,93 %), Swiss (- 5,84 %) and German (- 5,00 %) markets.

Table 1. Direct marketing expenditures at the level of the 30 international reference markets and Romania (expressed in millions US Dollars)

Country	Volume of expenditures				Dynamic of expenditures	
	1995	2000	2001	2005*	1995-2000	2000-2005*
Japan	107.851	67.278	69.985	87.090	- 9,01 %	5,30 %
Germany	29.381	22.733	25.591	36.886	- 5,00 %	10,16 %
United Kingdom	12.847	16.530	17.671	24.312	5,17 %	8,02 %
France	16.331	13.969	15.711	21.614	- 3,08 %	9,12 %
Italy	11.942	11.611	13.098	18.951	- 0,56 %	10,29 %
Canada	5.590	6.422	6.791	8.846	2,81 %	6,61 %
Netherlands	5.716	4.808	5.517	8.003	- 3,40 %	10,73 %
Switzerland	6.487	4.801	5.098	5.898	- 5,84 %	4,20 %
Chinese Taipei	3.327	4.310	5.081	10.554	5,31 %	19,62 %
Spain	4.628	4.065	4.563	6.703	- 2,56 %	10,52 %
Australia	3.636	4.045	4.507	6.406	2,15 %	9,63 %
Rep. of Korea	3.318	3.618	4.271	7.634	1,75 %	16,11 %

Belgium	4.447	3.588	4.044	5.895	- 4,20 %	10,44 %
Sweden	3.100	3.132	3.574	5.347	0,21 %	11,29 %
Hong Kong	2.632	2.694	2.939	5.386	0,47 %	14,86 %
Austria	2.904	2.408	2.706	3.840	- 3,68 %	9,78 %
Norway	1.880	2.389	2.599	3.274	4,91 %	6,51 %
Finland	1.832	1.797	2.088	3.242	- 0,39 %	12,53 %
Denmark	2.015	1.799	2.026	2.942	- 2,24 %	10,34 %
Ireland	882	1.408	1.744	3.309	9,81 %	18,64 %
Mexico	385	1.473	1.716	3.238	30,78 %	17,06 %
Argentina	1.139	1.073	1.139	1.479	- 1,19 %	6,63 %
Brazil	693	810	926	1.475	3,17 %	12,74 %
Portugal	477	474	545	858	- 0,13 %	12,60 %
Greece	360	435	506	797	3,86 %	12,87 %
New Zealand	582	493	493	661	- 3,26 %	6,04 %
Malaysia	359	341	388	725	- 1,02 %	16,28 %
South Africa	270	334	372	489	4,35 %	7,92 %
Thailand	186	137	149	229	- 5,93 %	10,82 %
Philippines	34	45	52	95	5,77 %	16,12 %
Romania	*wnd*	*wnd*	5	12	*wnd*	*25,00 %*

*Note: * estimated values. The hierarchy of the 30 international markets has been established considering the volume of specific expenditures registered in 2001. Source: The Direct Marketing Association.*

The decrease of the most part of the traditional markets has been relatively compensated through the more spectacular evolutions registered in less important markets such as Mexico (+ 30,78 %) and Ireland (+9,81 %), other favorable evolutions occurring in the Philippines (+ 5,77 %), Chinese Taipei's (+ 5,31 %) and United Kingdom's (+ 5,17 %) markets.

Predictions for the period 2000–2005 are optimistic: all the reference markets are expected to register favorable evolutions. Thus, the volume of the direct marketing expenditures is expected to grow from 205890 to 286178 millions US Dollars. The most spectacular increases are expected to occur in the Chinese Taipei (+ 19,62 %), Irish (+ 18,64 %), Mexican (+ 17,06 %), Malaysian (+ 16,28 %), Philippines (+ 16,12 %) and Korean (+ 16,11 %) markets. Less important increases are estimated for the Swiss, Japanese, New Zealand, Argentinean, Canadian and Norwegian markets while the estimated average annual dynamic of the direct marketing expenditures is around of 10 %.

Japan, Germany, United Kingdom, France and Italy will remain the top international markets in this respect, while Chinese Taipei and Republic of Korea are expected to penetrate and consolidate their presence in the first ten positions.

Interesting findings can be identified considering the direct marketing expenditures on B-to-C and, respectively, B-to-B markets. Thus, the ***B-to-C direct marketing expenditures*** have registered a similar evolution, between 1995 and 2000, decreasing from 106.400 to 87.104 millions US Dollars. Seventeen international markets have registered unfavorable evolutions, among the most significant being the Japanese (- 8,06 %), Swiss (- 6,06 %), Thai (- 5,81 %), Austrian (- 4,94 %), German (- 4,85 %), French (- 4,81 %) and Belgian (- 4,48 %) markets. The increases produced have been registered by the Mexican (+ 29,89 %), Irish (+ 8,86 %), Chinese Taipei (+ 6,10 %), Philippines (+ 5,92 %) and United Kingdom (+ 5,51 %) markets.

Table 2. B-to-C direct marketing expenditures at the level of the 30 international reference markets (expressed in millions US Dollars)

Country	*Volume of expenditures*				*Dynamic of expenditures*	
	1995	**2000**	**2001**	**2005***	**1995-2000**	**2000-2005***
Japan	47.660	31.307	32.257	38.053	- 8,06 %	3,98 %
Germany	13.898	10.841	12.093	16.859	- 4,85 %	9,23 %
United Kingdom	6.320	8.262	8.727	11.512	5,51 %	6,86 %
Italy	5.742	5.499	6.111	8.420	- 0,86 %	8,89 %
France	6.856	5.359	5.930	7.852	- 4,81 %	7,94 %
Canada	2.945	3.395	3.571	4.571	2,88 %	6,13 %
Netherlands	2.468	2.079	2.364	3.306	- 3,37 %	9,72 %
Spain	2.361	2.030	2.251	3.152	- 2,98 %	9,20 %
Australia	1.777	1.944	2.140	2.938	1,81 %	8,61 %
Switzerland	2.691	1.969	2.055	2.268	- 6,06 %	2,87 %
Chinese Taipei	1.259	1.693	1.962	3.835	6,10 %	17,77 %
Belgium	2.043	1.625	1.806	2.506	- 4,48 %	9,05 %
Rep. of Korea	1.248	1.419	1.642	2.754	2,60 %	14,18 %
Hong Kong	1.363	1.414	1.512	2.651	0,74 %	13,39 %
Sweden	1.276	1.226	1.379	1.975	- 0,80 %	10,01 %
Austria	1.322	1.026	1.131	1.516	- 4,94 %	8,12 %

Norway	838	1.014	1.080	1.325	3,89 %	5,50 %
Mexico	245	906	1.050	1.898	29,89 %	15,94 %
Denmark	925	795	878	1.210	- 2,98 %	8,76 %
Finland	694	642	729	1.048	- 1,55 %	10,30 %
Argentina	723	676	710	886	- 1,34 %	5,56 %
Ireland	314	480	583	1.028	8,86 %	16,45 %
Brazil	383	464	524	803	3,91 %	11,59 %
Greece	227	263	305	478	2,99 %	12,69 %
Portugal	221	212	240	363	- 0,83 %	11,36 %
New Zealand	251	207	203	259	- 3,78 %	4,58 %
South Africa	145	179	197	254	4,30 %	7,25 %
Malaysia	102	91	102	180	- 2,26 %	14,62 %
Thailand	85	63	68	99	- 5,81 %	9,46 %
Philippines	18	24	28	49	5,92 %	15,34 %

*Note: * estimated values. The hierarchy of the 30 international markets has been established considering the volume of specific expenditures registered in 2001. Source: The Direct Marketing Association.*

Table 3. B-to-B direct marketing expenditures at the level of the 30 international reference markets (expressed in millions US Dollars)

Country	Volume of expenditures				Dynamic of expenditures	
	1995	2000	2001	2005*	1995-2000	2000-2005*
Japan	60.191	35.971	37.728	49.037	- 9,78 %	6,39 %
Germany	15.483	11.892	13.499	20.027	- 5,14 %	10,99 %
France	9.474	8.610	9.781	13.762	- 1,89 %	9,83 %
United Kingdom	6.527	8.269	8.944	12.800	4,85 %	9,13 %
Italy	6.200	6.112	6.987	10.531	- 0,29 %	11,50 %
Canada	2.645	3.027	3.220	4.275	2,73 %	7,15 %
Netherlands	3.248	2.729	3.153	4.696	- 3,42 %	11,47 %
Chinese Taipei	2.068	2.617	3.120	6.719	4,82 %	20,75 %
Switzerland	3.796	2.832	3.043	3.631	- 5,69 %	5,10 %
Rep. of Korea	2.070	2.200	2.629	4.880	1,23 %	17,27 %

Australia	1.858	2.101	2.367	3.468	2,49 %	10,54 %
Spain	2.268	2.035	2.312	3.550	- 2,14 %	11,77 %
Belgium	2.404	1.963	2.238	3.389	- 3,97 %	11,54 %
Sweden	1.824	1.907	2.196	3.372	0,89 %	12,07 %
Austria	1.582	1.382	1.575	2.323	- 2,67 %	10,95 %
Norway	1.042	1.376	1.520	1.949	5,72 %	7,21 %
Hong Kong	1.269	1.280	1.426	2.735	0,17 %	16,40 %
Finland	1.138	1.155	1.359	2.194	0,30 %	13,69 %
Ireland	567	928	1.161	2.281	10,36 %	19,71 %
Denmark	1.090	1.004	1.148	1.732	- 1,63 %	11,52 %
Mexico	140	567	665	1.340	32,28 %	18,77 %
Argentina	416	397	429	593	- 0,93 %	8,36 %
Brazil	309	346	401	672	2,29 %	14,20 %
Portugal	256	262	304	495	0,46 %	13,57 %
New Zealand	332	286	290	401	- 2,94 %	6,99 %
Malaysia	257	250	286	545	- 0,55 %	16,87 %
Greece	133	172	201	319	5,28 %	13,15 %
South Africa	124	155	175	235	4,56 %	8,68 %
Thailand	102	74	81	129	- 6,22 %	11,76 %
Philippines	16	21	25	47	5,59 %	17,48 %

*Note: * estimated values. The hierarchy of the 30 international markets has been established considering the volume of specific expenditures registered in 2001. Source: The Direct Marketing Association.*

The B-to-B direct marketing expenditures have experienced, between 1995 and 2000, a relatively less favorable evolution, decreasing from 128.829 to 102.775 millions US Dollars. The increases, some of them more than impressive, registered in the markets like Mexico (+ 32,28 %), Ireland (+ 10,36 %), Norway (+ 5,72 %), Philippines + (5,59 %) and Greece (+ 5,28 %), have been negatively compensated by the decreases produced in markets like Japan (- 9,78 %), Thailand (- 6,22 %), Switzerland (- 5,69 %) and Germany.

The predictions related to the evolution of the both B-to-C and B-to-B direct marketing expenditures show favorable trends. The B-to-C direct marketing expenditures are expected to grow from 93.628 to 124.048 millions US Dollars, mainly due to the increases to be registered in markets

such as Chinese Taipei (+ 17,77 %), Ireland (+ 16,45 %), Mexico (+ 15,94 %), Philippines (+ 15,34 %), Malaysia (+ 14,62 %) and Republic of Korea (+ 14,18 %). Also, the B-to-B direct marketing expenditures are expected to grow, from 112.263 to 162.127 millions US Dollars, almost the same markets being the most representatives in this respect: Chinese Taipei (+ 20,75 %), Ireland (+ 19,71 %), Mexico (+ 18,77 %), Philippines (+ 17,48 %), Republic of Korea (+ 17,27 %), Malaysia (+ 16,87 %) and Hong Kong (+ 16,40 %).

The analysis of the **sales generated as a result of the direct marketing activities and campaigns** allows the drawing of the same general conclusions like in the case of the expenditures. Thus, between 1995 and 2000, the sales generated have registered, at the level of the 30 international markets, a relatively significant decrease, from 1511.100 to 1157.938 millions US Dollars. The major reason of this less favorable evolution was related to the negative developments occurred in the Japanese (- 10,21 %), Thai (- 6,98 %), Swiss (- 5,31 %), German (- 5,19 %) and Belgian (- 4,61 %) markets which have fully compensated some of the increases produced in the Mexican (with a sensational increase of + 46,74 %!), Irish (+ 18,12 %), Norwegian (+ 10,93 %) or Philippines (+ 10,73 %) markets.

Still, the period to come is seen from a highly optimistic perspective: the sales generated are expected to grow, from 1276.752 to 1952.557 millions US Dollars. The most important increases are expected to occur in markets such as Chinese Taipei (+ 25,85 %), Mexico (+ 24,29 %), Republic of Korea (+ 23,52 %), Philippines (+ 23,39 %), Hong Kong (+ 22,66 %) and Ireland (+ 22,53 %), smaller increases being anticipated for the United Kingdom, Canada, Japan, Norway and Switzerland. The average annual dynamic of the generated sales is estimated at a 12–13 %.

Table 4. The sales generated by the direct marketing activities and campaigns in 30 international markets (expressed in millions US Dollars)

Country	Volume of sales generated				Dynamic of sales	
	1995	**2000**	**2001**	**2005***	**1995-2000**	**2000-2005***
Japan	900.924	525.676	561.817	758.426	- 10,21 %	7,61 %
Germany	133.592	102.348	114.883	188.152	- 5,19 %	12,95 %
France	93.793	98.941	113.444	184.149	1,07 %	13,23 %
United Kingdom	66.477	97.015	102.782	155.542	7,85 %	9,90 %
Italy	48.852	50.505	59.326	104.372	0,67 %	15,62 %
Switzerland	51.668	39.328	41.884	52.681	- 5,31 %	6,02 %
Canada	29.097	35.087	37.614	53.885	3,81 %	8,96 %

Netherlands	24.639	25.708	29.850	49.958	0,85 %	14,21 %
Chinese Taipei	16.202	22.508	28.173	71.047	6,80 %	25,85 %
Australia	19.537	22.755	26.643	44.194	3,10 %	14,20 %
Belgium	21.365	16.876	19.444	31.529	- 4,61 %	13,32 %
Sweden	13.224	14.747	17.062	28.518	2,20 %	14,10 %
Norway	8.681	14.579	16.044	20.488	10,93 %	7,04 %
Rep. of Korea	11.300	12.787	16.014	36.760	2,50 %	23,52 %
Austria	14.971	13.952	15.747	25.631	- 1,40 %	12,93 %
Spain	12.123	13.422	15.517	26.776	2,06 %	14,81 %
Denmark	10.761	10.555	12.027	19.925	- 0,39 %	13,55 %
Hong Kong	12.235	10.509	12.016	29.178	- 3,00 %	22,66 %
Ireland	3.518	8.088	10.081	22.334	18,12 %	22,53 %
Finland	7.053	8.293	9.865	17.935	3,29 %	16,68 %
Mexico	437	2.973	3.712	8.819	46,74 %	24,29 %
Argentina	3.080	3.019	3.314	5.118	- 0,40 %	11,13 %
Portugal	1.893	2.261	2.582	4.615	3,62 %	15,34 %
New Zealand	2.607	2.220	2.393	3.794	- 3,16 %	11,31 %
Brazil	1.099	1.561	1.845	3.524	7,27 %	17,69 %
Greece	802	1.033	1.273	2.359	5,19 %	17,96 %
Malaysia	586	626	746	1.716	1,33 %	22,35 %
South Africa	185	259	302	449	6,96 %	11,63 %
Thailand	369	257	291	540	- 6,98 %	16,01 %
Philippines	30	50	61	143	10,76 %	23,39 %

*Note: * estimated values. The hierarchy of the 30 international markets has been established considering the volume of specific sales registered in 2001. Source: The Direct Marketing Association.*

The **sales generated by the B-to-C direct marketing activities and campaigns** have registered a relatively significant decrease, from 777.763 (in 1995) to 588.839 millions US Dollars (in 2000). The most unfavorable evolutions have occurred in the Japanese (- 9,82 %), Thai (- 6,76 %), Swiss (- 6,10 %), German (- 5,53 %) and Belgian (- 4,80 %) markets which have compensated the increases produced in the markets of Mexico (+ 46,14 %), Ireland (+ 16,84 %), Philippines (+ 10,76 %) and Norway (+ 9,34 %).

Also, the **sales generated by the B-to-B direct marketing activities and campaigns** have decreased, between 1995 and 2000, from 733.329 to 569.101 millions US Dollars. The most significant decreases have occurred in the Japanese (- 10,63 %), Thai (- 7,22 %), German (- 4,80 %), Swiss (- 4,61 %) and Belgian (- 4,39 %) markets. These unfavorable evolutions have been strong enough to compensate the increases registered in markets such as Mexico (+ 47,97 %), Ireland (+ 19,06 %), Philippines (+ 12,70 %) and Norway (+ 12,53 %).

Table 5. The sales generated by the B-to-C direct marketing activities and campaigns in 30 international markets (expressed in millions US Dollars)

Country	Volume of sales				Dynamics of sales	
	1995	2000	2001	2005*	1995-2000	2000-2005*
Japan	462.160	275.585	290.937	367.820	- 9,82 %	5,94 %
Germany	71.740	53.969	59.745	92.935	- 5,53 %	11,48 %
United Kingdom	37.185	53.507	55.815	79.597	7,55 %	8,27 %
France	43.377	38.600	43.094	64.866	- 2,31 %	10,94 %
Italy	26.450	26.503	30.641	50.978	0,04 %	13,98 %
Canada	16.747	19.850	21.046	29.047	3,46 %	7,91 %
Switzerland	24.597	17.952	18.767	22.298	- 6,10 %	4,43 %
Netherlands	11.976	12.154	13.959	22.383	0,30 %	12,99 %
Australia	10.757	11.954	13.772	21.685	2,13 %	12,65 %
Chinese Taipei	7.346	10.426	12.841	30.513	7,25 %	23,96 %
Belgium	11.121	8.694	9.907	15.334	- 4,80 %	12,02 %
Spain	6.924	7.400	8.431	13.671	1,34 %	13,06 %
Norway	4.485	7.009	7.529	9.215	9,34 %	5,63 %
Austria	7.795	6.691	7.396	11.205	- 3,01 %	10,86 %
Sweden	6.237	6.382	7.238	11.280	0,46 %	12,07 %
Rep. of Korea	4.965	5.761	7.074	15.108	3,02 %	21,27 %
Hong Kong	7.231	6.168	6.912	16.003	- 3,13 %	21,01 %
Denmark	5.618	5.240	5.855	9.138	- 1,38 %	11,76 %
Ireland	1.514	3.297	4.039	8.310	16,84 %	20,31 %
Finland	3.123	3.388	3.938	6.588	1,64 %	14,23 %
Mexico	297	1.980	2.457	5.523	46,14 %	22,77 %

Argentina	2.092	1.992	2.159	3.184	- 0,97 %	9,83 %
Portugal	1.022	1.172	1.319	2.246	2,78 %	13,89 %
Brazil	656	941	1.098	1.988	7,48 %	16,14 %
New Zealand	1.257	1.013	1.064	1.578	- 4,22 %	9,27 %
Greece	560	682	835	1.480	4,02 %	16,76 %
Malaysia	205	205	240	515	0,00 %	20,23 %
South Africa	115	158	182	260	6,56 %	10,47 %
Thailand	193	136	153	272	- 6,76 %	14,87 %
Philippine	18	30	37	81	10,76 %	21,98 %

*Note: * estimated values. The hierarchy of the 30 international markets has been established considering the volume of specific b-to-c sales registered in 2001. Source: The Direct Marketing Association.*

The perspectives of evolution for the sales generated by the direct marketing activities and campaigns are promising: both segments are expected to grow, from 638.480 (in 2001) to 915.101 millions US Dollars (in 2005) – for the business-to-consumer sales, respectively from 638.273 (in 2001) to 1037.454 millions US Dollars (in 2005) – for the business-to-business sales.

The ***sales generated by the business-to-consumer direct marketing activities and campaigns*** are expected to grow, between 2001 and 2005, with an annual average dynamic of 20 %, the most significant increases being estimated for the markets of Chinese Taipei (+ 23,96 %), Mexico (+ 22,77 %), Philippines (+ 21,98 %), Republic of Korea (+ 21,27 %), Hong Kong (+ 21,01 %), Ireland (+ 20,31 %) and Malaysia (+ 20,23 %).

Table 6. The sales generated by the B-to-B direct marketing activities and campaigns in 30 international markets (expressed in millions US Dollars)

Country	Volume of sales				Dynamic of sales	
	1995	**2000**	**2001**	**2005***	**1995-2000**	**2000-2005***
Japan	438.764	250.091	270.879	390.606	- 10,63 %	9,33 %
France	50.416	60.341	70.350	119.283	3,66 %	14,60 %
Germany	61.853	48.379	55.138	95.217	- 4,80 %	14,50 %
United Kingdom	29.292	43.508	46.968	75.945	8,23 %	11,79 %
Italy	22.401	24.002	28.685	53.393	1,39 %	17,34 %
Switzerland	27.071	21.376	23.117	30.383	- 4,61 %	7,29 %

Canada	12.350	15.237	16.569	24.838	4,29 %	10,27 %
Netherlands	12.663	13.554	15.891	27.575	1,37 %	15,26 %
Chinese Taipei	8.856	12.082	15.332	40.535	6,41 %	27,39 %
Australia	8.780	10.801	12.871	22.508	4,23 %	15,82 %
Sweden	6.987	8.365	9.824	17.238	3,67 %	15,56 %
Belgium	10.243	8.182	9.537	16.195	- 4,39 %	14,63 %
Rep. of Korea	6.335	7.026	8.940	21.651	2,09 %	25,24 %
Norway	4.195	7.570	8.515	11.273	12,53 %	8,29 %
Austria	7.175	7.261	8.352	14.425	0,24 %	14,72 %
Spain	5.199	6.022	7.086	13.105	2,98 %	16,83 %
Denmark	5.143	5.315	6.172	10.787	0,66 %	15,21 %
Ireland	2.003	4.792	6.041	14.024	19,06 %	23,96 %
Finland	3.929	4.905	5.926	11.348	4,54 %	18,26 %
Hong Kong	5.004	4.341	5.104	13.174	- 2,80 %	24,86 %
New Zealand	1.350	1.207	1.330	2.216	- 2,21 %	12,92 %
Portugal	870	1.089	1.263	2.369	4,59 %	16,82 %
Mexico	140	993	1.255	3.296	47,97 %	27,12 %
Argentina	988	1.028	1.155	1.934	0,80 %	13,47 %
Brazil	443	620	747	1.536	6,95 %	19,89 %
Malaysia	380	421	506	1.201	2,07 %	23,33 %
Greece	242	351	437	879	7,72 %	20,15 %
Thailand	176	121	138	269	- 7,22 %	17,33 %
South Africa	70	101	120	190	7,61 %	13,47 %
Philippines	11	20	25	61	12,70 %	24,99 %

*Note: * estimated values. The hierarchy of the 30 international markets has been established considering the volume of specific b-to-b sales registered in 2001. Source: The Direct Marketing Association.*

The same perspectives are also expected to occur for the **sales generated by the business-to-business direct marketing activities and campaigns**. Thus, the most significant increases, with an average annual dynamic of more than 20 %, are expected to register in the markets of Chinese Taipei (+ 27,39 %), Mexico (+ 27,12 %), Republic of Korea (+ 25,24 %), Philippines (+ 24,99 %),

Hong Kong (+ 24,86 %), Ireland (+ 23,96 %), Malaysia (+ 23,33 %) and Greece (+ 20,15 %).

The most important conclusions to be drawn are related to the direct marketing expenditures and sales for the international reference markets:

- after a small decrease, registered between 1995 and 2000, direct marketing is expected to register, both in terms of expenditures and sales generated, a significant increase in the next period, from 2001 to 2005;

- the most important markets supporting this trend of development (in terms of the expenditures) will be Chinese Taipei, Ireland, Mexico, Malaysia, Philippines and Republic of Korea; the increase is expected to be moderate for the "mature" markets, where direct marketing has already reached a significant level of development (mainly in the European markets); the lowest dynamics are expected to be registered in Switzerland and Japan;

- the vector of the future direct marketing development will be represented, considering the specific expenditures at the level of the major market segments, by the B-to-B campaigns, their dynamics being superior by comparison to that related to the B-to-C segment;

- the major markets supporting the trend of development (in terms of generated sales) will be, practically, the same like in the case of the expenditures – Chinese Taipei, Mexico, Republic of Korea, Philippines and Ireland as well as Hong Kong and Malaysia. The increase of the sales will be a moderate one on the "mature" markets (mainly in the European markets); the lowest annual dynamics are expected to be registered in Switzerland, Norway and Japan;

- the estimated levels of the sales generated support the more significant contribution of the B-to-B direct marketing campaigns, their dynamics being superior to that specific to the B-to-C ones.

The comparative analysis of the expenditures and sales suggests, in terms of effectiveness, a small decrease between 1995 and 2000, followed by an easy revival produced in 2001. The increasing trend is expected to be maintained between 2001 and 2005. The gross margins generated by the direct marketing campaigns were of 84.4 % (1995) and decreased to 83.7 % (2000). The next year has brought a slight increase to 83.9 % and they are expected to reach 85.3 % (2005).

Similar evolutions are anticipated for the both B-to-C and B-to-B market segments. Thus, the B-to-C campaigns (which have generated gross margins of 86.3 % - 1995, respectively 85.2 % - 2000 and 85.3 % - 2001), are expected to provide a 86.4 % margin (2005). Also, the B-to-B campaigns (which have generated gross margins of 82.4 % - 1995, respectively 81.9 % - 2000 and 82.4 % - 2001), are expected to provide a 84.4 % margin (2005). The segment of the individual consumers has generated and it is expected to continue to generate a sensible higher gross margin by comparison to the segment of organizational consumers.

Based on these statistics, it can be stated that direct marketing represents a field well implemented within the current activities of the organizations present in the international markets, its instruments being employed in different ways according to the specific level of penetration and integration in the reference markets. The tradition, the evolutions occurred and the dynamics registered in the United States place this market as the most suitable model for the future development of direct marketing, the other markets representing just more or less successful copies.

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THE DEVELOPMENT OF DIRECT MARKETING SERVICES
IN THE ROMANIAN MARKET

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Abstract: *At a first sight, the development stage of the Romanian market of direct marketing services appears to be a mixture corresponding to an emergent and, respectively, a growing market. The early developments produced in the inter-bellum period, continued by the poor presences registered in the period of the centralized economy have been followed by a more significant development after 1990. The paper presents the main results provided by the analysis of the quantitative and qualitative data regarding the direct marketing industry as well as the most relevant conclusions based on these.*

In spite of some remarkable evolutions for an emergent and transitional market, the level of the direct marketing development in Romania can be characterized, considering a four-step scale, merely as a primary one. To make a comparison with the frequently used concept of PLC (Product Life Cycle), the Romanian direct marketing can be considered as being in the initial stage of launching, all the events occurred within the areas of the postal and telecommunications services, financial and banking services, dedicated services provided by the specialized operators supporting this assumption.

Even at a small scale, direct marketing is present within the Romanian organizations both formally and operationally. There is a number of organizations concerned to plan, organize and implement direct marketing campaigns or, at least, to conduct some of its specific activities (development and usage of databases, mailing of the personalized and/or non-personalized offers toward the customers and prospects, employment of the telephone in outbound and/or inbound telemarketing campaigns and activities, direct response advertising).

There are also present in the market some specialized providers of related direct marketing support services such as advertising and direct marketing agencies, database suppliers, media suppliers covering practically all the spectrum of the communication media and channels – TV, radio, press, courier services and postal and telecommunications providers all acting in an environment more and more regulated.

It would have been expected the transition period to bring more in terms of the direct marketing development. Still, the evolution of the domain has been an ascendant one, and it is rather impossible to notice a more significant development when even the entire field of marketing as well as the Romanian economy and market were not able to grow more. Yet, the basis of the future development of the field have been established and the most recent changes occurred allow to identify promising trends of growth.

The major coordinates of the direct marketing development in Romania are related to the same factors determining its increase in the different international markets: an adequate economic environment, significant changes in terms of the social and cultural characteristics of the consumers, a more proper infrastructure of postal and telecommunications services, the development of the communication media, an institutional environment able to regulate and, thus, to support the development of the domain and the establishment of a national direct marketing association (The Romanian Direct Marketing Association, since November 2003).

Near these, the emergence and the development of a number of specialized service providers have contributed to the favorable evolution of the field. Even their number is too small and the results achieved (especially from a financial perspective) are less significant, their presence represents a kind of guarantee for the further development of the industry. The major direct marketing agencies active in the Romanian market are listed in the table below:

Table 1. Major direct marketing agencies present in the Romanian market 2002 – 2003

Agency	YofE	Turnover (2002)	Emp	DBS (% IC)	Covered fields
121 Marketing	2000	165000	12	1000000 (95 %)	all industries
Cash Group	1995	wnd	16	> 300000 (0 %)	all industries
CIPP DmD	1998	wnd	4	200000 (62.5 %)	all industries

Clarity	1999	wnd	7	6000 (0 %)	IT, agriculture
Direct Mail& Press Distribution	1999	wnd	30	wnd	wnd
Direct Marketing Concept	1998	144500	2	380000 (99 %)	all industries
Felicitas Marketing Romania	1994	wnd	wnd	> 1000000 (wnd)	all industries
Hit Mail	1997	700000	75	6000000 (50 %)	all industries
Mailers	1998	400000	15	12000000 (96 %)	all industries
Open Public Services	1996	830000	50	5000000 (99 %)	all industries
Unicorp	1997	wnd	7	7000 (0 %)	all industries

Notes: *Yof E – year of establishment, Turnover (2002) – the turnover of the agencies expressed in US Dollars registered in 2002, Emp – number of full-time employees, DBS (% IC) – the size of the databases owned (the specific weight of the individual consumers), Covered fields – the markets addressed through the services provided by the agencies. Sources: The Business Review Workbook 2003, Bucharest 2004.*

The analysis of the industry of direct marketing agencies present in the Romanian market allows the drawing of some interesting conclusions about their activity and results as well as the entire sector. Thus:

- **the most part of the Romanian direct marketing agencies has been established between 1996 and 1998**. Among the factors determining their appearance can be mentioned the newness of the field and the intention of the beginners to speculate the opportunity of being first in the market providing specialized services, the experience and the results of a part of the direct marketing agencies founders achieved within the „traditional" advertising agencies, the recession of the Romanian market (and, consequently, of the advertising industry) companies and marketing services providers searching for not necessarily more effective but definitely cheaper marketing communication and sales promotion solutions);

- **the most important result achieved was, in fact, the ability to remain in the market** which has proven to be sensitive rather to other than marketing communication and sales

promotion instruments and techniques. The turnovers of the direct marketing agencies for 2002 (less than a half of them being open enough to make public the specific volumes of sales...) hardly compete the budget of a single „traditional" advertising campaign for a fast moving consumer good, proofing again, if necessary, the launching stage of the Romanian direct marketing industry and market;

- **the current development of the Romanian direct marketing industry is an extensive process**. As a fact, nine out of eleven direct marketing agencies active in the Romanian market address to all the organizations coming from all industries. If, at a first sight, this may be seen as a proof of openness of the agencies toward all the products and services markets, a more in-depth view suggests a continuous concern to search for new customers. The contracts signed weight more in terms of importance by comparison to their objects. Just a single agency is oriented toward the IT and agricultural markets but the size of the database owned as well as the reserved attitude in making public the turnover may be seen as signs of a merely limited success;

- **the range of the services provided is also relatively limited**. The most frequently provided services are related to the direct mail campaigns organizations and implementation as well as to the database development and employment. The portfolio of activities experiences an extension only in the case of larger agencies through the inclusion of telemarketing and online marketing related activities. The most part of the activities conducted and services provided are related to the database development: less favorable, the interest of the agencies' customers is not related to the further usage of the databases in the direct marketing campaigns they being mainly the result of some „traditional" marketing actions (promotional contests and sweepstakes, sampling and other sales promotion activities);

- **the structure of the databases owned by the Romanian direct marketing agencies is specific for an offer oriented mainly toward the development of the databases related services**. Unfortunately, these services are not completed with other supporting the organization and implementation of the further direct marketing campaigns aiming to generate direct orders. The main explanation for this situation is given by the profile of the agencies' customers, most of them being providers of consumer goods and services and preferring to allocate significant amounts of money for „traditional" marketing activities (especially marketing communication campaigns). Other reasons of this situation may also be represented by, on a hand, the limited competencies of the specialized providers and, on another hand, the limited direct marketing knowledge and expectations of the potential customers of the agencies;

- **the customer portfolio of the direct marketing agencies is less diversified**. Even the names included within the customers lists made public by the agencies are more than impressive in the context of the Romanian market (Coca Cola, Philip Morris, Nissan, Suzuki, Shell, Microsoft, Gillette, Bergenbier, British American Tobacco, Mobexpert, Brau Union, Kraft Foods, Hewlett Packard, Danone, Pfizer, Tuborg, ING Nederlanden, Compaq, Cisco, Computerland, Shell Gas, Romtelecom, Unilever, MasterFoods, Glaxosmithkline, Rank Xerox, McDonald's, IBM, Porsche, Ogilvy&Mather, Graffitti BBDO, La Fourmi, Star Foods, Sony, Benckiser, Johnson & Johnson, MobilRom, Pfizer, Monsanto, Scala Business Services and the list may continue...), they suggest at least two relevant limits. First, the number of the penetrated fields is still limited. More, fields of activity recognized as landmarks for the direct marketing development – such as financial and banking and insurance services – are poorly represented considering the customers of the direct marketing agencies. Second, the current customers perceive direct marketing with a lower interest by comparison to the „traditional" marketing communication activities. Thus, the related investments have weighted only for 4.8 % (in 2001) respectively 4.3 % (in 2002) in the total of the advertising expenditures made at the level of the Romanian market;

- **the competition with the „traditional" advertising agencies present in the Romanian market is a definitely tough one**. The far richer experience achieved as well as their better image in the market are two strong pillars sustaining the advertising agencies competing with the direct marketing agencies in their race to get as much as possible of the marketing communication budgets brought in the market. The most part of the relevant advertising agencies present in the Romanian market (25 out of 35) are providing direct marketing services. One of the solutions employed by the direct marketing agencies to remain and consolidate their positions in the market was to subcontract the direct marketing campaigns gain by the advertising agencies. Still, it is to be stressed that the direct marketing agencies have apparently succeeded to improve their position in the market as, by comparison to the previous year (2002), the weight of advertising agencies providing direct marketing services has decreased from 80 % to 70 %;

- finally, **the international dimension of the direct marketing agencies is poorly represented**. Just two of the existing agencies have international connections (Open Public Services having a Swiss participation of 45 % – EDMI Holding, while Mailers being affiliated to D Interactive, a French company specialized in providing CRM services). This suggests the fact that Romanian market of direct marketing services is still less attractive for the potential foreign investors, the model established by the „traditional" advertising

agencies – the takeover of the agency by an international name of reference – so desired and practiced in the national market being too far.

The major conclusion to be drawn states that, in terms of the direct marketing services provided by the specialized agencies, the field is somewhere at the end of the launching and relatively close to the development phase. It is to be expected that the development of the entire Romanian market and a better understanding of the role of marketing and of the marketing communication at the level of the Romanian organizations will bring better times for the direct marketing industry. As the necessary, minimal, infrastructure in terms of providers and specialized services seems to exist, the development of the field lays on the efforts of the direct marketing agencies to stimulate the organizations to want more than to build databases and offer them an extended portfolio of competencies and services.

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COMUNICATION AND CHANGE AS MANAGERIAL ABILITIES

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Abstract: *The change is the testing field for managerial capacities, for the managers' ability of understanding people, for their honesty and communicating ability.*

If managers can successful control the change, then they can be confident in a successful supervising of the continuity and routine.

It is obvious the important role of the communication in the control of the change. In this paper we will consider the help given by the managers to the people, to understand why there are changes, supporting them during the transition, resolving the problems that can appear, quicken them to involve and dedicate to the events.

The change is the testing field for managerial capacities, for the managers' ability of understanding people, for their honesty and communicating ability.

If managers can successful control the change, then they can be confident in a successful supervising of the continuity and routine.

It is obvious the important role of the communication in the control of the change. In this paper we will consider the help given by the managers to the people, to understand why there are changes, supporting them during the transition, resolving the problems that can appear, quicken them to involve and dedicate to the events:

1. A few strategies to obtain people's support. In this field there is the golden rule: "What you don't like don't do it to the other one". We all know how it is when you are kept in the dark, helpless and manipulated, but when we make other to feel this we want them to be grateful to us!

These strategies, in obtaining support in change's application means much more than the common sense, which we are supposing that everybody has it, when he passes through the same situation.

If the people want to endure successfully a change they have some simple conditions:

- They need the whole context for the proposed change and its signification;
- They need to picture themselves and their situation after the change;
- They need to feel that there aren't contested their self esteem and their security;
- They need to be involved in planning and application as soon as possible;
- They need to see the change as a piece of an endless process, in which the company searches the continuous improve of the quality, services that are offered, competitively, efficiency, rationality and so on.

2. <u>The origin, the context and the meaning of change.</u> We all have to feel that we understand what is happening around us: that we have in mind a practical model obvious about how everything works and why people do what they do. There is that certain self understand which underlines our membership sensation or our feeling like home in our community, in our working place or in our culture. We appreciate its value only when there is no self-understanding, like when we are in other places and situations, when our practical model doesn't apply.

In figure 1 we present the types of human answers to change.

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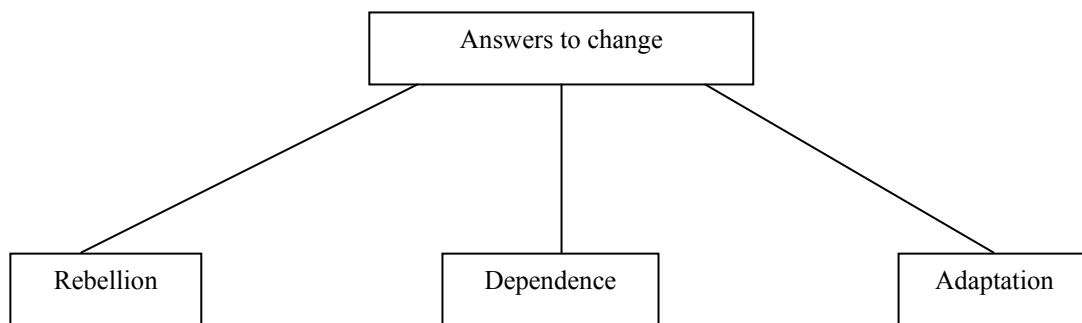
Fig. 1 Types of human answers to change

There are three types of human reaction to change: two childish and an adult one. The childish ones are the rebellion and the dependence.

The rebellion gushes through believing half everything that is new and sustaining that nothing is changed, that you are right and all the others are wrong. The dependence gushes through being overwhelmed by everything that is new and different, without understanding anything, leaving others to decide for you. We can recognize both answers in familiar stereotypical of the English man being abroad.

The adult answer consists in elaborating a new practical model for the new situation, based on observation, questions and maybe on attempts and mistakes.

The rebellion and the dependence are natural reactions to the scarceness of information in a new situation. The adult answer in elaborating a new understanding is based on the access to information.

It is often said that the first question, which humans ask about every change, is: "What is in it for me?" In fact, this question is usually the second. Almost invariably, the first one is "Why?" and has two answer types:

<u>Because</u> (for example the antecedents, the origin and the circumstances) and:

<u>For that</u> (for example the means and the intentions).

The first one is referring to the present situation and on what has to be done, and the second one is referring to the future and on what has to be accomplished. As a general rule, the humans have to think at all changes possible through these two perspectives. The future vision isn't enough, nor the present. If these two can be collocated than the manager will gain a very strong support source. In figure 2 is presented the correlation between "why the change" and the forces needed by change.
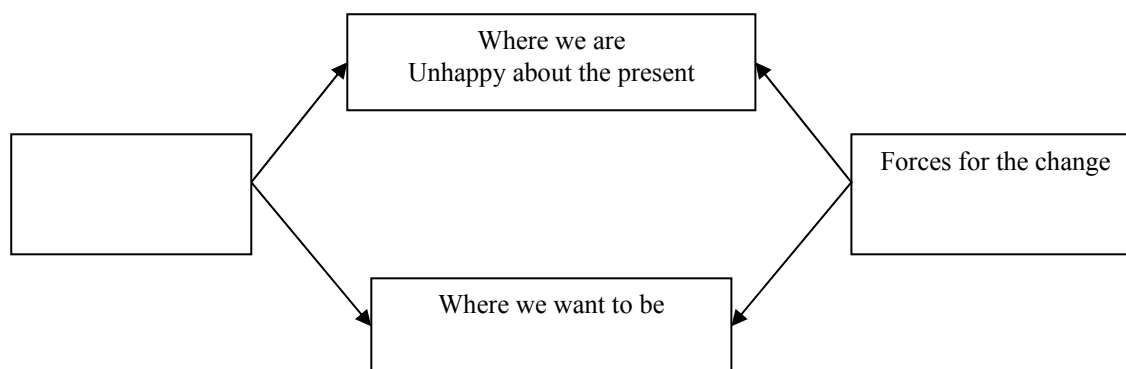
Fig. 2 The correlation between "why the change" and the forces needed by change

If the manager wants a constructive answer from the staff regarding the inevitable changes, than it is practical to give them explanations. If he can satisfy an unpleasant by offering information instead of rejecting it or negating it, than he has moved the dialog on a much productive field.

3. V<u>isualizing the new situation.</u> We have already seen that the unknown fear is a powerful and motivating factor, but it is also a terrible resisting force to the change. So it is much better for the manager if he succeeds to make public all information; this one decreases at the maximum the unknown's area and minimizes the resistance based on it.

We don't know the future until it becomes present. This doesn't explain the manager's speechless on undetermined time and the fact that the manager asks the others, the staff, to "wait and see". The manger can help the others giving them the power over the company's futures and establishing a control over this one, if the manager can determine the staff to try to imagine "a repetition" of the future. It can be said "visualization" but it doesn't involve only the sight sense. "How it will appear, how it will sound, how will be for us the new situation?" Regarding the employer, he will ask: "What will I do, what will I feel, learn and say? Where it will be my new working place and how will I accommodate to the new situation?"

If the manager succeeds to involve the staff in process – to use their imagination to project them selves in the new situation and, as a matter of speech, "to observe their own reactions" - then he will obtain the best positive reactions in the same time:

- The anticipation of the barriers, which might foreclose the change's acceptation. Although some barriers exists only "in the mind", they are real for those persons.
- Support for realizing some plans to make them work.
- Total devotion for the change, because the people will start to feel it as "their problem".

Obviously, it is an exercise of participation and anticipation, not of "guessing", so the manager will succeed to introduce the change in the company when he will prepare the staff to support will all their forces the introduction of the new, of the change. It is never too early for the company's manager to break out a certain process and it is never too late to continue it. In the beginning he will help at solution the problems that may appear in the new working or organizing system, to satisfy as many requirements as possible. After the event, he will provide the staff the details for the application of the change or of the new working system.

4. <u>Manager's care for self-esteem and security.</u> When the manager thinks that his security and his status are threaten by the change, he will become defensive and he will reject the danger. And otherwise: if the manager is satisfy by the change knowing that, no matter what will happen, his self esteem and his security will remain unchanged, than he will be ready to assume much risks. In this way, many risks can be eliminated.

It is one of the radical principals of the Japanese management. In the big Japan companies, the employers are assured that the managers won't allow that the change's results to injure their interests; the staff itself will be one of the important initiation of the change. The Japan managerial policy of continuous improving of a product and of a method it is based on an implied contract: the change's benefits will be split between all the participants.

Contrary, the most workers outside of Japan can remember a lot of examples with changes felt a manipulation, when all the benefits went towards a certain group and "all the broken dishes"

towards another one. With such memories, it is obvious why they don't want to collaborate to their own crash.

5. <u>The manager must sue to the staff in time.</u> If one company's manager wants indeed that his staff won't be only docile, but to be involve in the change and to support it, than it will appear some obvious advantages in seducing them as soon as possible in this process:

- It is trust demonstration;
- And, most important, it offers for the ones involve the opportunity to bring their own contribution to the process.

As many people bring their contribution to the new system, the many will feel it as belonging to them and they will make sure that it works.

The contrary is the case when the staff isn't involved in imminent change. In figure 3 it is represented the diagram of the elements of a successful change based on an efficient collaboration between the manager and the staff.

Involved information	→	Membership trust	→	Support up

Fig. 3 The diagram of the elements of a successful change

We see, sometimes, in action a classical kind of prophecy regarding complacence. The managers avoid involving theirs staff in planning the change, because they are anticipating their objections and weaknesses. They don't want to challenge the staff if it is not necessary, especially when they are vulnerable and their projects are half supported. As a measure of protection, the leadership doesn't want to reveal their plans until they are certain that they have gained the staff's support or until they are making them "chess mat".

As a consequence of these secrets they might obtain exactly the contrary. When is presented to the staff a plan almost ready to be apply, everybody examine it carefully, especially for what it might not work: that is for the deficiencies that could have been avoided if they were asked before. What could have been a useful suggestion – if it would have been made at the right moment – becomes into a no useful complaint, if it is too late.

In this way, the managers which don't succeed to involve their staff in making decisions – because they are scared that the process might be detained by the objections, the humming or the demands – they are convincing them selves that their fears aren't justified when the manifestations are taking place. The vicious circle of change based on secrets is shown in figure 4.
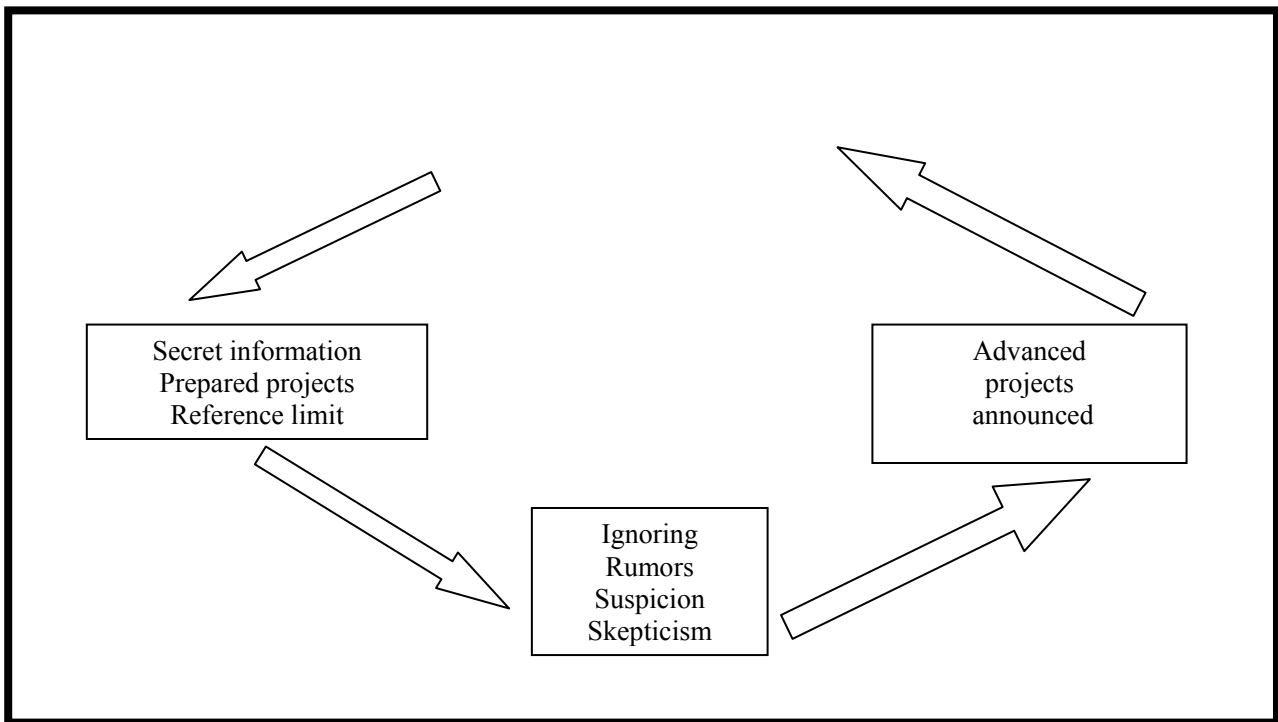
Fig. 4 The vicious circle of change based on secrets

It is obvious how this vicious circle can be stopped; but that action needs courage, because it defies what might be taken as the experience lesson.

6. Manager must demonstrate that every change made is better. Many people don't realize the profound changes that took place in business world, during the '80 and in the beginning of the '90's. There aren't captive markets no more, nor the intervention or governs' settlements to temperate the competition's impact; there aren't "simplified" markets either where the new customers buy what the old customers want. The customers realize that their choosing have to fallow the new, the change and the improve. People expect that the nest car should be much sophisticated that the last one. They are expecting that the new washing machine should be economical, should have many programs and to have another design that the last one. The insurance companies are paying the difficulties in deciding "a substitute", when all the present products are available with others characteristics that the original article.

All these are so familiarly, for us as customers, so we don't stop to think over them, although it wouldn't hurt to do it as a producer, because the same rules are applied. For each consumer, which thinks as normally the continuous improve of the product, must exists a producer who thinks in the same way.

Phenomenal accomplishments, technological revolutions, the total "rethinking" of a product will always be rare events. What keeps us in business is a simple thing: <u>being always in front of the competition.</u> This doesn't mean to disappear from the competition. <u>It is enough to be so advanced so you pass the first the finish line.</u> This involves <u>a continuous and restless search of the improve</u> in all possible ways: quality, quantity, opens minded, opportunity, efficiency, viability, productivity and so on.

Obviously in searching big and small improves, the companies' managers involve many people in research for gaining as many improve for their products and services as possible. Even if the companies' managers don't want to be involved in this researching process they have to show understanding towards the idea. The best way to establish a certain relation is that <u>the company's manager should demonstrate the improve brought by a change</u>.

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ORGANIZING A TOURISM DESTINATION AS A NETWORK, FROM DE POINT OF VIEW OF THE HOST AND OF THE CLIENT: CASE STUDIES ON AGROTOURISM AND A TOUROPERATOR

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Abstract: *How is a tour operator taking the decision to build and organize a destination? How is the area of it decided? Is the theory valid in practicing? Once set it up which could be the best way to manage it?*

The study is based on the experience of Euro-Host Group. During the WATA Annual Meeting in Bled in 1995 two managers, one from Austria and one from Romania found out that one way to balance the destinations they were working on was to increase their force by adding similar ones from the same geographical area: Central Europe, at the time a free niche. The marketing researches showed that Western Europe was well organised to meet the Asian tremendous demand estimated for the first decade of the third Millennium. The case shows that a destination can not be "organised" by tour operators without local support and enrolment not only through partners but also by local actors. And that the theory has to fit to the real opportunities. From the point of view of a client a destination is quite different as that one described by academic literature.

In the same line, we have come to the conclusion that the development of agro and rural tourism in developed countries is mainly a result of the need for social peace than a business.

Before coming to talk about networks we just point out one of the definitions of a tourist destination. Gunn[1] (1994) define the tourist destination as a geographical area that has a critical mass of development that can satisfy the objectives of the tourist. The main elements of a tourism

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[1] Gunn, C. A. (1994). *Tourism Planning: Basics, Concepts and Cases*, 3rd ed, Taylor and Francis, New York.

destination are natural resources, accessible transportation, attractive services, promotion and information   In order to sell a tourist destination specialized structures have occurred: the DMCs (Destination management companies or ground handlers). According to Rob Davindson and Beulah Cope (2003) DMCs are key intermediaries whose strength lies in their extensive and detailed knowledge of the destination where the meeting events is to be held.

Terms like "building, organizing, managing a tourist destination" are not used from a very long time. We state that there are two capital types of their meaning.

The first one: Tourism is not for poor people, like the people of Somalia or Bangladesh b.e. **Poor countries might earn money from tourism** mainly by developing the international tourist arrivals.

The second one: organizing leisure and recreation for the local community *and also* **for tourists that visit it.**

How is a tour operator taking the decision to build and organise a destination? How is the area of it decided? Is the theory valid in practising? Once set it up which could be the best way to manage it?

Our study is based on the experience of Euro-Host Group. During the WATA Annual Meeting in Bled in 1995 two managers, one from Austria and one from Romania found out that one of the ways to balance the destinations they were working on, was to increase their force by adding similar travel agencies from the same geographical area: Central Europe, at the time a free niche.

1995 Bled. Ex Yugoslavia was in war, in fact a short break for some of its new result countries. Because of the flight costs almost of the participants to WATA General Assembly came from Europe. Soon, an impressive feeling has risen and points out the differences between Eastern and Western countries. We present the conclusion of the two managers, gained in time. This conclusion illustrates also our first statement about the meaning of tourist destination: that one meaning **organizing leisure and recreation of the local community and also for tourists that visit it.**.

At the time and in the time Euro-Host founders appreciated that there are no fundamental differences between West and East concerning democracy or political organization. Even if East countries have to redevelop the democracy they have loosen being left into communist system after the 2 nd WW, the traditions and basic feeling are the same. Even concerning religion. The gap was economic, the development of their economy. East countries hosted "classical" industries, old type of factories and, by consequence their productivity. West countries have overcome that level and their economy relays on the new generation of "soft" industries based on high productivity. The "productive" systems of the postindustrial societies have such a level of performance that a very

small part of the population can assure the required quantities of good for the hole population even an over production for export that can cover the needs of the hole planet. But this production is limited as quantity. The economic demand for profit overcomes even the moral considerations, even the Christian charity. In EU, b.e. the workable agricultural areas are strict limited in order to sustain an acceptable level of the production that will not lead to overproduction and thus the crash of the prices, a situation hard to be controlled and imagined now, when the " symbol economy" is several times the volume of the "physical economy". The unemployment that result in this way must be absorbed in a way or an other. The services sector is the affordable issue. In EU, is more and more usual that in the same farm the first generation perform the classical agriculture and the next one has to lead towards services, as agro or rural tourism. Substantial founds are allocated by EU for such conversions. As a consequence the building and organizing and managing of a "tourist destination" is extremely sophisticated and a first priority. We appreciate that a huge work of persuasion of the population is achieved. It started by inoculation the use and need to travel to surroundings mainly during weekends (the average distance in tourism is now of 65 miles). A special infrastructure was sustained and developed in order to involve low costs (camping, biking, walking, trekking etc). A large part of the "disposal" labor is engaged in tourism, organizing the tourist destination, maintenance of the utilities, sport and leisure, promotion, information, guiding etc. This phenomenon is much more perceivable in EU's countries that have high incomes and developed economies: Holland, Denmark, Sweden, Switzerland, Great Britain. And these countries are the same that make the greatest efforts to help the Easter economies, specially to develop the rural tourism. The incomes in rural tourism are not high but they afford a reasonable earning and mainly the continuous occupation of labor force even if the touristical flows are seasonable (during off season the conservation, the modernization, the maintaining and the opening of the tourist bases are done). There is a reasonable question that showed up: why this interest and these efforts from people used with the work and the profit and for which the help used to be in a form of sponsorship or philanthropy. We have concluded that it is because they need social peace. More, we have arrived at the end result that the demographic evolution of Europe has brought the both categories of countries in the same position: the demographic decrease of the population on medium and long term and the pressure of imminent immigration, especially from outside Europe. More, once the enlargement process started it was decided also the progressive modernization of the adherent economies. That is performance economies, similar to those of Western Europe that means a future high unemployment too. We have to add to this, for agriculture – to keep the case – the need for reconversion or professional reorientation of a large part of the population of rural areas. In Romania 50% of the population leave in rural areas and most of it has the income's sources in this

area. As an effect of the adheration only a small part of this population will be involved in agriculture, the industrialized agriculture. For Romania we can consider that 42-43% of the population will be affected. Even if only half of it will be obliged to find a new business and we reach impressive figures, millions of people. And it is obvious that the system of unemployment or social grants can not be accepted because of social risk: the labor force must be kept under pressure, trained for further efforts. The situation is similar in all others adherent.

But this is the social part of the nowadays challenges in tourism. **Rural tourism is not a business for tour operators. It might be for small size enterprises, the local ones. For large ones, the profit margins are too small.** They must involve themselves in building, organizing and management of other type of destination.

What Euro-Host has concluded? There is only one way to balance the destinations they were working on: to increase their force by adding similar agencies from the same geographical area: **Central Europe, at the time a free niche**. The marketing researches showed that Western Europe was well organised to meet the Asian tremendous demand estimated for the first decade of the third Millennium. We can see that the over one million of millionaires of Pacific area will be the future clients overcoming the Americans. And these are clients with buy power that need a new kind of classic tourism that must afford them the contact with the roots of contemporary civilisation: Europe, the European culture. More, **the financial power of the entrepreneurs of Euro-Host group obliged them to focus only on incentive and business tourism**.

The Central Europe just came out of communism and the new structures were to be built. They started by finding partners in the area and were obliged to teach them what a destination is. By that time a *regional governmental action which pushed Vienna, Budapest and then Prague to join their efforts was used to combine local actors* in order to build the area and assemble the local destinations into a common offers and a distinctive ones. Euro-Host decided to use the wave. **Our conclusion**: the network needs a suitable environment to be able to work and develop. Otherwise it will be too difficult to built the net and make it workable.

In order to "optimised" the trans ocean flights' costs by offering more as a destination using the same flight, it has come as natural that the Central Europe – common speaking the former Habsburgic Empire – might be a "destination that can be an alternative for Western Europe. It might include as highlights Vienna, Budapest, Prague and Transylvania. That is Austria, Hungary, Check Republic, Slovakia, Romania and Poland, all of them sold by a common name.

At the time, the tourism structures were weak in the area and their performances far from the international tourism standards, mainly those for incentive and corporate events. And more, each of them was playing alone, separately and thus unattractive for this kind of tourism. Connecting all

together would strong their hit power on international offer either for some of them or for all of them. Clients might have the opportunity to choose and organise their "own" trip by combining different local destinations that offer the same type of services and the same quality level. That lead to the concept of **adjustable destination**. How was it built up?

Step one: organising the net: As the development level was different between the group members a schedule was set up to build the net, the group. Former Cosmos Austrian tour operator opened subsidiaries in Budapest and Prague in order to involve and use the local specialists. Because of local conditions Romania was appreciate to be ready only for 2004-0006. Other partners jointed the group. Euro-Hosts is now available in Austria, Croatia, Czech Republic, Hungary, Slovakia and Romania as well as in Poland, Russia and the Baltic States by subsidiaries or joint partners. They use the same name as a brand: Euro-Hosts even if each member keep behind the common brand also their former trade mark and juridical state for a couple of years, in order to keep their market values. It was a net not a group, even if they use the "dot org" for their site.

Step two: organising the destination: a "rehearsal" activity started on 1996 using Western Europe markets. That meant two directions:

1. to organise each destination highlighting its particularities; local specialist had to deal and even to teach local actors what a destination is and how they can make money of organising it (for example, they have to argue that Bucharest has no downtown as the city was built by the end of 19 th century for people in carriages, not for walking people).

2. the management of the area as a hole or as a substituting parts. The group becomes Euro-Hosts promoting the Central Europe

The first demand has requested a terrible work. The comparison between Vienna, Prague, Budapest and Bucharest point out huge differences concerning the time and opportunities to match the international standards for tourism. But all over, they have to teach effectively their members and local partners what a destination is, how they have to build it, how to organize and manage it. They have had to deal with touristical services suppliers, but also with cultural and leisure suppliers as museums, events organizers, art performers and particularly with local authorities. The local conjunctures were very distinct. By far Vienna was better equipped as a destination and it was easier to organize and promote the fist products.

Euro-Host had to avoid classic tourist offers. They had to find and organize incentive products that can by developed on the existing and predictable infrastructure. Each destination must be able to have the same kind of facilities: not identical but equivalent and interchangeable taking into account their common heritage and local specificity. By example: a short tour in Budapest had

included a trip by ship on Danube to a local port where an orchestra waited the guest and was the start point for a race on Trabant - the ex communist brother of Volkswagen – for 3 km into the pusta, then by carriges the guests reached a farm where a typical dinner was served with Gypsy orchestra and dances, to end the evening on Vaci Utzca on a fashion night bar. In Prague, the Trabant race was replaced by a journey "on the steps of solder Sweig" on the pubs of the historical centre of Prague and a vampire dinner in a medieval castle closed to the town.

You might object that all these are just classic touristical products. But they were quit new, far away from the former local offer, they reorganised the local services and meet the request of destination's definition: a geographical area that has **a critical mass of development** that **can satisfy the objectives** of incentive tourism, **promoting the** local **destination** by its specific heritage and life. And more, **all local destinations were connected in** a global one offering **the same, but in a distinct way**: **Central Europe**.

For a tour operator the academic rules are not so important as long as it found out that it has **a critical mass of offer** that meet **the requirements of a certain mass of potential tourists** that can **bring enough turnover** to **justify the investments made to organise the "destination"** through the returned profits.

A "rehearsal" activity started on 1996 using Western Europe markets. The target: corporate potential tourists. The destination: Central Europe. The main supplying countries: Italy and France. After 5 years of hard working with local actors involved in this offer the new destination can count in Budapest over 60.000 tourists, in Prague over 70000 tourists and in Vienna over 65000 tourists. More than 40% of them bought all three local destinations and an other 40% two of them using the same global offer. Half of them came as individuals or as small groups.

Step three: The request for corporate multinational tours obliged the Euro-Host group to organise the group's management. The interests of each member of the "group" were different. Each of them wants to conserve its autonomy but also to take advantage of being in the group. The management had to focus on their common interest: the need of clients. The tool was marketing researches and common promotion. Each member become a specialist on local area and developed the elements that fitted the whole. All together have formed the destination.

Natural, this "destination" is far away for usual ones. Practically it is only as an offer, as a product by a special and unique kind of combining the existing or improved elements of local infrastructure. *But this special way of doing it has lead to a new destination over the border of the existing countries, pushed not by local people or authorities, but by a regional tour operator.*

Step four: the chosen management type (based on the common interest of the members focused on marketing and promoting and thus, supplying the clients for the whole group) has

brought results. The puzzler of local destinations built together under the same brand, allowing the corporate clients to choose and compose the product by themselves was a good construction. Local expertise has met into a global offer, a new facility for this kind of tourists. The group has had to develop its activity. The first market attached was the Arabian one. Marketing researches for China are on the way.

This example illustrates our first meaning of a destination. An unusual one, as it is just an untouchable construction using existing element. For local people it is nothing, but **for tourists it is a destination**. And an attractive one for corporate clients as they have the liberty to choose the hole of it or just some parts they find suitable for their guests. We have found out that the theory does not fit to the real opportunities, as the interests of a tour operator detect "cheaper" ways to fulfil the needs of its clients by organising the critical mass of existing elements suitable for tourism in a certain area, that can exceed the borders

MARKETING OF THE BANKING PRODUCTS AND SERVICES

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Abstract: *To be able to influence the choices of the people in banking products and services, the banking stuff has to know that the actions of the consumer are considered as a tendency towards a certain decision. The buying process begins and ends much before the acquisition; it begins with the appearance and the perception of the need and it ends with the post acquisition analysis. The consumers take decisions, which respond to their needs in the process of choosing the best product, or service that one bank or many banks are offering it on the banking market.*

At the same time with our country entering in free market economy's road, the Rumanian commercial banks started to intensify their own marketing effort. Depending on technical, organizational and financial possibilities had enlarged as much as possible their products and services delivered to the market, which lead towards more aggressive marketing policies.

The marketing and the seals are based as well on a well known of the clients' needs, as on presenting the advantages which the banking products and services consumer can obtain through buying and using them.

In all activity sectors, the increased competition had determined the producers and the utilities' deliverers to orient towards the best satisfy of the needs formulated by their potential costumers, phenomenon which varies in banking sector.

The most important elements of the marketing activity are defined as:

- Identifying the present and future markets or market segments as much as stable as profitable;
- Identifying and evaluating present and future needs of the clients which action on these markets;
- Creating new products and services which best satisfy the needs;

- Promoting and administrating the products thus the strategic objectives should be accomplished, such as: interest, stability, quality, satisfying the clients' demands, competitively and so on.

Banking marketing is referring to actions done by the banks to gain market segments and satisfying in the best way the clients' demands. The banking marketing may be considered as an element of the general marketing, whose global objectives although are identical, the methods and the purpose are specific.

Banking marketing's characteristics are a result of the complexity and the nature of the existing connections between the bank and the others medium's elements, or, on the other hand, of the banking product's particularities.

As a conclusion, the marketing activity can be focused and exert on the two levels, meaning:

a) At the level of constituting the money resources attracted in its circuit;

b) At the level of the concrete way to use these resources in the purpose of realizing the organizational objectives.
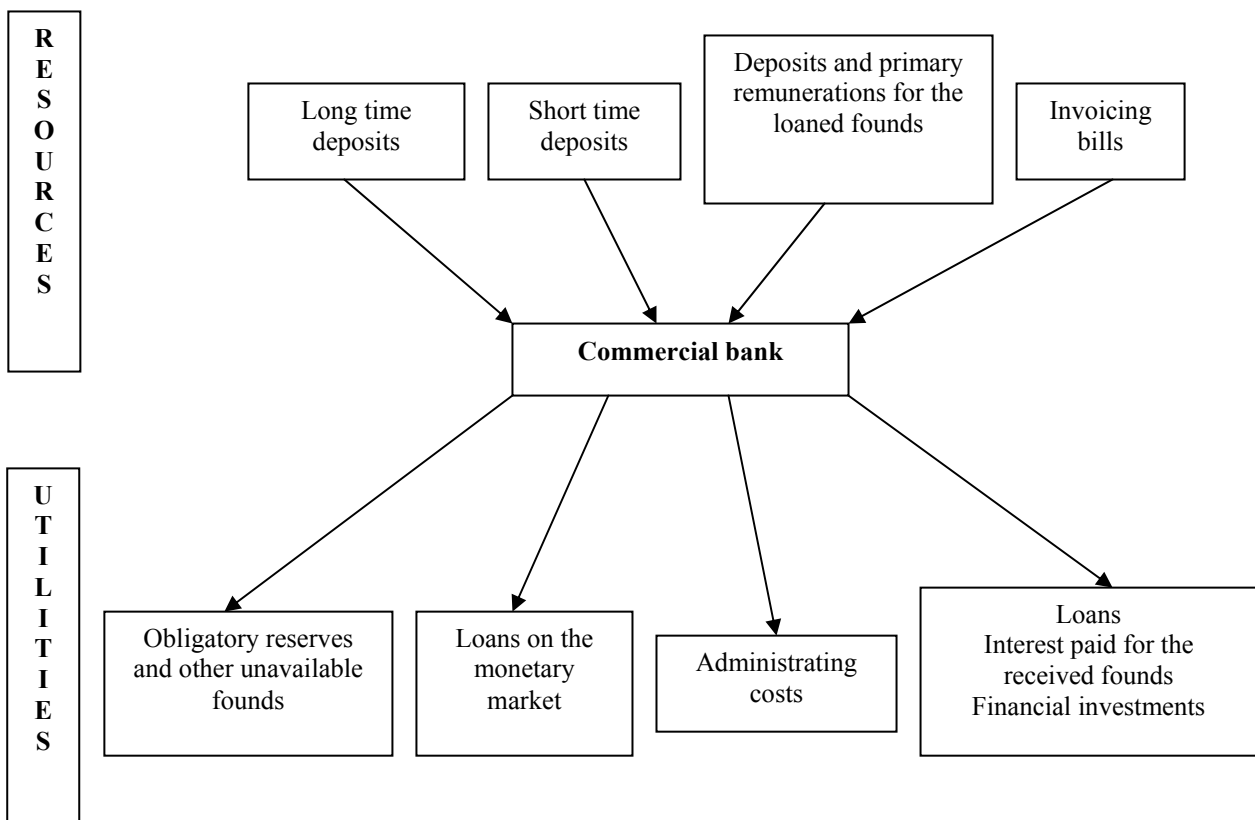
Figure 1 Commercial bank's connections with the economical medium

Banks are considered as working entities multi-producer because they are proposing and delivering to the clients, different and specific services and products. In marketing vision, banking

products are defined here in a large acceptance and they are regarding the offer made by a bank to its clients without being necessary to refer to the nature and dimension of the used founds.

It is necessary to present some specific characteristics of the banking products and services delivered to the clients. These are the fallowing:

a) The banking products and services are proposed and delivered **directly** to the clients. The relation "producer - consumer" appeared in this case, is directly, none interposing to any intermediary in distribution circle. These circles are administrated by the banks and that is why there is a total correspondence, from the client, between the bank's image and "the intermediary agency's" image;

b) The banking products are **immaterial products,** which approach the best the services performances. They aren't affected by the morally wearing out, and their "aging" is very slow. As a proof some products are as old as the banking activity itself, having a life as long as the banks'. They aren't protected by patent acts and each new service created by the bank can be immediately taken and promoted by the banks, if it doesn't contest the law;

c) Although the banking products and services have the same economical content and answer the same demands, however they can be the **different** from one bank to another. Regarding an industrial enterprise, for example, the specialization of a product with certain utility, supposes the separation of the similar products through design or, through their specific characteristics. In banking, the specialization has a double meaning. In this way the banking products can be dissented through the name which varies from one bank to another, or through accentuating a certain quality of the product (interest, using);

d) Banking products, are **conditioned** by the **juridical** and **normative** frame specific to the banking area, and not least, by some settlements of the supervising authority. The legal settlements, the financial ones and the banking ones creates for the banking products and services essential and definitely characteristics which increase their attractively and leads towards logic, order and discipline.

Regarding the banking products and services' demand it is worth to be underlined some specific aspects of this one, like the fallowing:

✓ *The demand's heterogeneity*

The customers are different one from another. Through the customers there are also individual persons, who have interests and opinions different, and juridical persons, from the family

associations to the large enterprises. The needs of these clients are extremely various and dynamic, and that is why the marketing activity of the banks have to consider seriously this aspect.

     ✓ *The demand's atomicity*

The bank's patronage, at least the individual persons and small enterprises, is large and leakage. To initiate and supporting the business relations with all these clients it is necessary an ample mobility of the resources, a concentration of all efforts in contacting and negotiating, especially when these have thin package of knowledge and a small negotiating power. Regarding the medium and large enterprises this issue is different, because they know very well what banking product or service they want.

     ✓ *The demand's stability*

It regards, on one hand, of the relation "product - client", and on the other hand, the relation "bank - client". In banking there are many products related one to another and often it might that the demand for one banking product to generate the demand for another, in this way we are assisting to the creation and distribution of a package of services. For example, various banking deposits are associated with some economize or investments plans, desired by the clients in their need to buy different things or to build something, which is correlated with their demand for different kinds of loans. A deponent will find that it is much easier to have at the same bank his current account and his long-term deposits. When a client takes a loan from one bank he is correlated to that bank for the entire period of the loan, period in which he can benefit of others account services. His salary can be transferred through the bank, he can use cards and he can obtain others loans for personal needs.

As a complementary relation to the connection "product - client" appears the relation "bank - client". A client chooses his bank for strong reasons. The most important rule in choosing a bank is the distance between the bank's location and the client's location, the social category to which belong the client, and not least, the bank's credibility and reputation, the managers' ethics and theirs' behavior.

     ✓ *The demand's irrationality*

Almost all of the banking products and services are reported to money, and, often, the enterprisers' behavior is irrational in this field. The raison for this behavior is that there is a certain delay between the needs and the motivations generated by a banking product or account service, and their irrational behavior shown in the way in which they are approaching some problems that appear.

To show a practical example of the offer of banking products and services in our economy, we took BankPost, a bank, which we consider, that represents successfully our banking system.
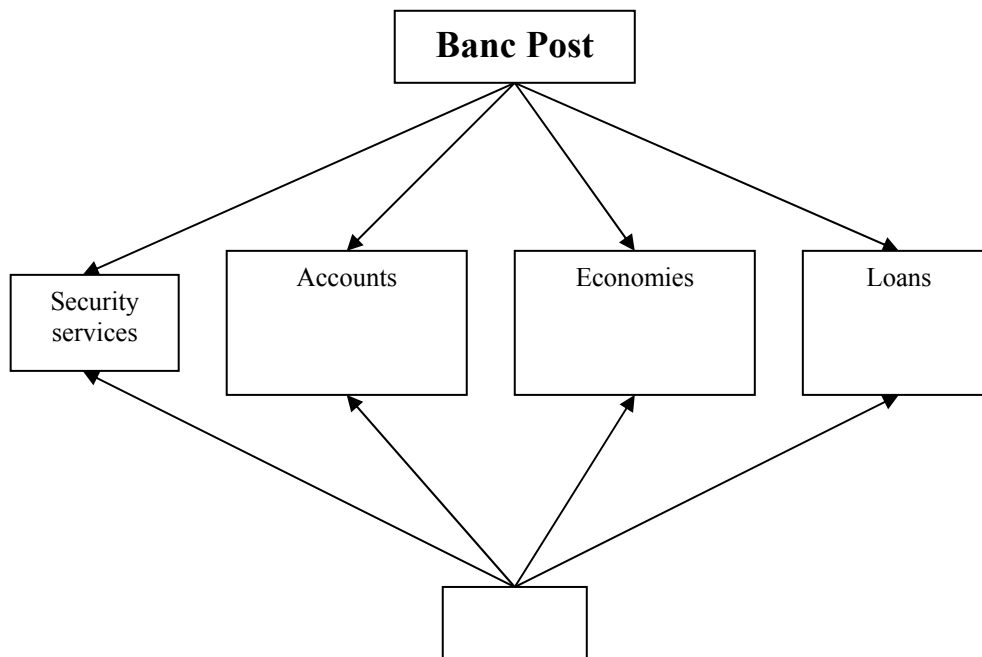
Figure 2 Simplified structure of the products and services' offer

In their activity we can often observe that the marketing promoted by some banks is oriented towards market resources study, towards the deposits, and less towards their uses, which are, the loans given. The both ones are important; especially the loans when the economies are on positive trend, and that are why our banking system should review their loans policies.

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LE MANAGEMENT DES STRUCTURES DE COMMUNICATION ABORDÉES DU POINT DE VUE DE LA PROGRAMMATION NEURO-LINGUISTIQUE

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Dévelopée à la fin des années 1970, la programmation neuro-linguistique est une approche de la communication et du changement. Les Américains Richard Bandler et John Grinder, ses "inventeurs", ont rassemblé leurs connaissances pour voir quels sont les ressorts qui constituent la base des interventions des professionnels de la communication les plus performants. En effet, ils voulaient savoir exactement quels sont les techniques et procedures communes que ces gens utilisent, pour pouvoir après les reproduire.

Par conséquant, la Programmation Neuro-linguistique est une technique qui nous aide à mieux communiquer, à initier des processus de changement profonds et à long terme.

Sa démarche est formée de plusieurs pas:

1. intérêt pour les processus neurologiques qu'utilise une personne dans les situations de sa vie;

2. montrer quel est le lien entre les processus neurologiques internes et l'activité externe qui en découle;

3. développement et enseignement des éléments suivants:

   - moyens qui permettent de communiquer avec ses interlocuteurs en s'adaptant à leur style;

   - moyens d'obtenir de ses interlocuteurs des informations verbales et non-verbales necessaries à la mise en oeuvre d'une intervention;

- techniques de changement qui permettent aux deux partenaires de communication d'évoluer et d'enrichir la vision de la réalité.

Pour être plus clairs, nous allons expliquer les concepts qui forment la base de la Programmation Neuro-Linguistique: les cinq sens, qui nous permettent de prendre contact avec le monde extérieur et de récupérer des informations qui seront ensuite traitées par notre cerveau. Par ces cinq portes, nous percevons le monde externe et nous construisons aussi notre exprérience interne de la réalité

Le code PNL pour les processus de perception est le suivant:

V pour Visuel

K pour Kinesthésique (toucher, sensations, emotions)

A pour auditif

O pour Olfactif et Gustatif

C'est le système "quadruple" – V.A.K.O., qui peut prendre aussi un "e" à la fin pour les perceptions externes (systèmes de perceptions) ou un "i" pour les perceptions internes (systèmes de representations).

En effet, dans la plupart des cas, nos expériences de la representation sont mixtes: notre attention est divisée entre ce qui se passe autour de nous et les processus internes de pensée et de sentiment.

L'optique que la PNL a sur l'être humain est la suivante: l'homme detient sa propre vision du monde déterminée, son modèle sur lequel est fondé son comportement. Comment cela?

Tous nos processus de perception sont extrêment subjectifs – "on ne voit, on n'entend que ce que l'on veut bien voir/entrendre". Notre contact n'est pas avec le monde extérieur objectif, mais avec "notre" monde interne, subjectif, reconstruit à partir du monde externe. Nous percevons ce qui nous entoure par nos sens, par nos expériences antérieures, par la culture dont nous provenons, par les opinions et les conclusions que nous avons déjà faites sur la vie est les gens. Donc, ce que nous appelons "le monde" n'est en effet que notre perception du monde et non pas la RÉALITÉ. Ce monde que nous portons en nous est le résultat des apprentissages et croyances acquises tout au long de notre vie, des perceptions présentes et des images que nous nous faisons du futur, c'est donc un monde limité et déformé. Selon la PNL, nous avons tous la force de changer ces paramètres de notre vie, pour enrichir notre modèle du monde, tout en prenant appui sur les ressources sus-mentionnées.

Pour faire cela, il faut tout d'abord repérer les sequences sensorielles spécifiques que nous traversons au cas d'un problème et à les reorganiser.

Chaque personne a sa propre dominante sensorielle – visuelle, auditive, kinesthésique – qu'elle utilise le plus souvent et dans laquelle elle fait preuve de la plus grande finesse de distinction.

Par conséquant, chaque personne apprend de manière différente et communique par son propre canal de communication. Ce sont des informations importantes, qui jouent un role essentiel dans la communication: si l'on ne connaît pas la dominante sensorielle de notre interlocuteur, nous pouvons conclure qu'il est resistant ou négatif…

La PNL nous enseigne comment "lire" et détecter la dominante sensorielle d'une personne: en l'écoutant parler, pour pouvoir déceler les mots qu'elle utilise le plus souvent. Les mots que nous choisissons reflètent les processus internes que nous utilisons pour construire l'expérience présente.

Dans le discours de l'autre, il faut faire attention aux prédicats (les verbes, les adjectives, les adverbs), qui sont des mots qui reposent sur une base sensorielle. Donc, quand nous parlons, nous disons ce que nous faisons intérieurement.

Par exemple, quelqu'un qui, pour expliquer une situation, utilise des mots comme: "voir", "regarder", "lumineux", "clairement" est une personne qui construit ses expériences internes de façon visuelle.

Une autre source d'informations sont les mouvements de nos yeux, qui indiquent "comment nous pensons" et qui précèdent l'expression verbale de la pensée.

Par exemple, quelqu'un qui s'exprime en termes visuals aura tendance à diriger les yeux vers le haut.

Tout l'ensemble de ces observations précises forme la base d'un système de méthodes qui nous aident dans différents domaines de notre vie: communication professionnelle et personnelle, enseignement, interventions pour le changement.

I. POUR UNE COMMUNICATION EFFICACE

L'un des axiomes des théories de la communication est que l'on ne peut pas ne pas communiquer!

La question est de savoir exactement ce que l'on veut communiquer et quels sont les résultats que nous attendons de cette communication, pour pouvoir ensuite adapter notre message. La PNL affirme clairement que **l'indicateur de la communication est la reaction de l'interlocuteur**.

Rappellez-vous les cours où vous aviez envie de vous endormir au bout d'une demie-heure… Le message était clair: "Dormez". Par contre, un prof qui veut dire "J'ai des choses extraordinaires à vous dire" trouvera les méthodes pour tenir l'auditoire en prise.

C'est vrai qu'il est difficile de trouver les bonnes méthodes pour un auditoire de 50 personnes, il est donc utile de posséder un répertoire comporamental assez large, pour pouvoir s'adapter avec flexibilité à tous nos partenaires relationnels.

Plus clairement, il faut avoir:

- la capacité de determiner ses objectifs avec clarté (des objectifs spécifiques, concrets, observables, formulés en termes positifs, conçus selon une representation sensorielle etc)
- le sens de l'observation (conscience de ce qui se passe maintenant, calibrer)
- la flexibilité de s'adapter aux diverses situations rencontrées (parler le langage du partenaire, agir sur le processus de la communication plutôt que sur le contenu).

La calibration est une procédure préférée dans la PNL – il s'agit de repérer des indicateurs comportamentaux et physiologiques associés à un état interne. C'est comme faire une photo d'une personne qui est dans un certain état interne et qui montre certaines choses. Plus tard, quand vous verrez ces reactions non-verbales, vous saurez exactement quel est l'état interne de la personne en question.

Un autre concept de la PNL est la synchronisation – il faut se synchroniser sur une personne (refléter son processus du langage, verbal et non-verbal) pour pouvoir lui montrer que nous la comprenons. Il s'agit d'adopter, de reproduire les comportements verbaux et non-verbaux de notre interlocuteur. Par exemple: bouger de la même façon, reformuler ce que l'autre a dit, utiliser la même syntaxe, les mêmes prédicats. Il ne faut pas le copier, mais lui faire comprendre que nous sommes en contact avec lui, que nous comprenons son problème.

Nous arrivons ainsi au phénomène de l'encrage: une ancre est l'association qui s'instaure entre un stimulus et la réponse suscitée. Un exemple: l'association entre une main sur l'épaule et l'état intérieur + les comportements externes correspondants. Dans la PNL, l'encrage est utilisé pour fixer une réponse afin de la stimuler quand l'on veut. Plus ou moins, c'est une manière d'influencer les autres, mais de manière consciente, tout en sachant exactement quelle est la nature de cette influence et quel est le résultat que nous en attendons.

II. LA PROGRAMMATION NEURO-LINGUISTIQUE APPLIQUÉE DANS LES LIMITATIONS PERSONNELLES ET LES RELATIONS PROFESSIONNELLES

Comme nous le soulignons plus haut, la PNL nous aide à devenir plus efficaces, à dépasser nos problèmes et nos limites, car nous avons tous en nous les ressources dont nous avons besoin.

Quand nous sommes nerveux, nous savons très bien que nous avons eu aussi des états de calme et de paix intérieure. Mais nous ne savons pas comment faire autrement, et alors nous

tournons en rond et nous sommes nerveux encore une fois et encore une fois… Alors, la PNL peut nous aider à susciter ces états et à les connecter à la situation présente.

La PNL ne veut pas nous faire analyser les causes psychologiques de nos états, nous faire trouver les racines de nos problèmes, cela reste l'objet d'autres domaines. Dans la démarche PNL nous devons nous appuyer sur nos propres ressources et changer ce qui ne nous plaît pas (dépasser une limite personnelle, élargir son répertoire de comportements, améliorer ce que l'on fait déjà).

Si nous prenons une expérience quelconque, nous verrons qu'elle se compose d'un ensemble d'éléments sensoriels (V, A, K, O) qui délimitent le territoire de cette expérience et "construisent " une partie du monde dans notre tête.

Pour apprendre à la dépasser, il faut passer par le processus de désactivation de l'ancre de cette expérience.

C'est l'un des exercices de la PNL, qui consiste en la technique suivante:

1. identification et expérimentation de l'état de limitation (la situation inconfortable)
2. identification et expérimentation d'un état ressource (une situation plaisante)
3. neutralisation du sentiment déplaisant
4. vérification
5. intégration dans le futur.

Une autre technique: la dissociation simple, qui est utilisée surtout dans le cas des situations extrêmement émotionnelles. En effet, il s'agit de faire une distinction entre l'état associé (quand nous sommes dans l'expérience) et l'état dissocié (quand nous sommes hors de l'expérience et nous la revivons comme spectateurs).

Les phases sont les suivantes:

1. identifier la situation à traiter et ce qui la déclanche
2. identifier et experimenter un état-ressource
3. revoir la situation perturbante à partir de la position dissociée
4. vérification
5. intégration dans le futur

Comme nous l'avons déjà mentionné, la PNL nous aide aussi à enrichir notre repertoire de comportements.

On peut faire cela par l'ancrage des resources et l'acquisition d'un nouveaux comportement pour faire mieux ce que l'on fait déjà bien.

Appliquer la PNL dans les relations professionnelles, voilà un autre sujet intéressant. Qu'il s'agisse de vendre un produit, d'animer une réunion ou de négocier un contrat, nous avons tous besoin d'être meilleurs dans notre vie professionnelle.

Dans la vente (d'un produit, un service, une idée, une candidature), la qualité de la communication est essentielle. La personne qui achète a déjà dans sa tête une projection imaginaire de l'objet/service qu'elle achète, et donc le vendeur doit savoir conduire sa rêverie, à aider le client à imaginer son futur. C'est le cas des spot de television, qui présentent un homme au volant d'une voiture super-puissante, dans un paysage magnifique. Celui qui regarde pourrait se dire: "c'est l'image que je vais avoir/donner aux autre si j'achète cette voiture".

Un vendeur professionnel doit être prêt pour faire face aux objections (l'idéal serait de les anticiper et les éviter!), qui peuvent apparaître par défaut de sychronisation ou par une définition fautive des objectifs. Le vendeur devra savoir comment se servir de ces objections, comment les recadrer pour résoudre les problèmes.

Dans le cas des réunions, il faut savoir maintenir l'attention et l'intérêt des participants, savoir les impliquer dans ce qui se passe, leur donner le sentiment que la reunion apporte des bénéfices pour chacun d'entre eux.

Une rénion réussie a plusieurs phases:

1. la phase avant la réunion – quand il faut préparer les aspects matériels mais quand l'animateur doit se préparer lui-même pour l'animation

2. le début de la réunion – accueil et calibration des participants, échange entre les participants sur les objectifs et le but de la réunion

3. la réunion proprement-dite – l'animateur en état d'éveil de tous ses sens, concentré sur les participants etc

4. conclusion – l'animateur concentre l'attention des participants sur ce qui a été realize, ce qui reste à faire etc

La négociation est un moyen d'obtenir des autre ce que l'on désire pour soi-même. Les situations les plus fréquentes qui requièrent un savoir-faire de négociateur sont celles où les buts des deux interlocuteurs semblent en opposition.

Ici aussi il y a plusieurs phases:

1. la préparation – s'assurer qu'il existe un cadre d'entente possible, decider le résultat visé, recueillir des informations sur l'autre partie, élaborer un plan d'action, s'assurer que la négociation sera faite avec la personne qui a le pouvoir de decision

2. la négociation proprement-dite – la faire au niveau des intérêts réels, faire mieux qu'attaquer et se défendre, annoncer clairement ses questions ou suggestions, exprimer ses sentiments, ne pas blâmer l'autre, rester souple

L'un des problèmes qui peuvent apparaître dans les négociations est le blocage. Un bon négociateur sera prêt pour cela et trouvera toujours une méthode pour relancer la discussion et la négociation.

En guise de conclusion, nous allons reprendre un autre axiome des temps modernes: la seule constant de nos société est le changement. Alors, pour réussir dans sa vie personnelle et professionnelle, il faut acquérir aussi d'autre facultés que celle enseignées dans les écoles: comment apprendre et comment être flexible. La PNL est l'une des voies à suivre dans la direction de la réussite. Elle nous enseigne à s'appuyer sur nos ressources internes et à copier les savoir-faire de ceux qui ont réussi dans leurs activités. La PNL nous enseigne que ce que nous sommes déjà (notre monde) peut nous aider à devenir meilleurs dans tout ce que nous faisons et à depasser nos limites.

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NEW PRODUCTION MANAGEMENT PARADIGMS INSPIRED FROM INTELLIGENT MANUFACTURING SYSTEMS

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Abstract: *The paper presents some of the new manufacturing system model developed. Even if, all of these paradigms were created for the management of industrial processes, the results contribute to the development of the management as science, and are applicable for other activity fields. We will present some of the most influential concepts: HMS, FrMS, BMS, Lean manufacturing, ant colonies model, etc.*

Introduction

In these post-industrial times, manufacturing is still one of the cornerstones of our society. The increasing market pressure forces the industry to shorten product life cycles, to reduce time to market and to improve product quality. Increasingly, traditional centralized and sequential manufacturing planning, scheduling, and control mechanisms are being found insufficiently flexible to respond to changing production styles and highly dynamic variations in product requirements. Under these circumstances in a present manufacturing system, rarely do things go as expected.

For several years, research has focused on several aspects of manufacturing, from the individual processes towards the management of virtual enterprises. Recent development in science, in particular in computer science and resulting information-oriented technologies offers new challenges in manufacturing. Hence, new concepts of manufacturing systems based on more natural, non-deterministic fundamentals are emerging. The researchers used elements from wide range of sciences like mathematics, informatics, physics, sociology, biology, genetics, management of change, etc. to develop some revolutionary models like Fractal Factory (Warnecke, 1993), Bionic Manufacturing Systems (Ueda, 1992), Holonic Manufacturing Systems (Yoshikawa, 1992). After

more then 10 years of research, these concepts are step by step introduced at the top industrial companies (Toyota, Daimler Benz, Sony, Honda, Fujitsu, etc.). The results are highly relevant for the production management theory and the results and methods can be applied in non-industrial activity fields.

1. New manufacturing paradigms

These new challenges were already foreseen in the beginning of the 90's by several researchers. In the last years several emerging concepts were developed, and important research programs were lunched. The most important is the IMS (Intelligent Manufacturing Systems) research program, which involves over 20 countries, 150 partner institutes and 400 researchers. The international Intelligent Manufacturing Systems (IMS) research program is an attempt to systematize and make operational world-wide knowledge of advanced manufacturing systems as a basis for new paradigms. In the following we will give an overview of some models, developed in the six test cases to date.

1.1. Multi agent systems

There is no unified and generally accepted definition of an agent, amongst others because of lacking consensus on the intelligence of an agent. For some researches, agents are only independent co-operating computer processes that can act on their own initiative. Control decisions are reached through mutual agreement and information is exchanged freely among the participating agents. For others an agent is a real or virtual entity able to act on itself and on the surrounding world, generally populated by other agents. To perform its actions this entity contains a partial representation of its environment, and can communicate with other agents of this environment. Its behaviour is based on its observations, its knowledge and its interactions with the world of other agents. An agent has several important features. It

- has capabilities of perception and a partial representation of the environment,
- can communicate with other agents,
- can reproduce child agents,
- has its own objectives and an autonomous behaviour

Starting with the first definition given to an agent, the multi-agents systems, "can best be characterised as a software technology that is able to model and implement individual and social behaviour in distributed systems." (Bussman 1998). If we take the second definition of an agent, than a multi agent system (MAS) is an artificial system composed of a population of autonomous agents, which co-operate with each other to reach common goals, while simultaneously each agent pursues individual objectives.

In either way defined, the MAS is strongly connected with the notion of heterarchical control, which is a highly distributed form of control, implemented by a system of independent agents without centralised or explicit direct control. Heterarchical control turned out to be very robust and reactive against disturbances, especially because of its emergent behaviour. However, banning all forms of hierarchy, most approaches for heterarchical control do not consider optimisation important, because in reality, 'schedules are broken down by disturbances anyway'. Predictability and stability of distributed systems usually is also lower than in centralised ones. It is believed that in very unstructured environments, heterarchical control without explicit schedulers can be the most suitable approach. In other situations, however, the incorporation of a scheduler in a distributed system would enhance the stability, predictability and performance. Another problem is more practical by nature. Many heterarchical algorithms need to be properly fine-tuned, which is a quite labour intensive work.

The concepts for heterarchical control are derived from biological metaphors and analogies to the free market economy. In biological systems and market economies, reactivity to disturbances emerges almost automatically from simple mechanisms in the behaviour of individual agents and the interactions between these behaviours.

The MAS concept can be considered as a starting model for the rest of distributed, more practical, manufacturing models, presented below.

1.2. Holonic manufacturing System

The concept of a *holon (Holos in* Greek is meaning whole and *-on* is meaning part of) was proposed by Koestler thirty years ago in the book "The Ghost in the Machine" The basic idea of holon is a double-face effect, which means every holon is an autonomous whole and also a part of a larger holon at the same time. Holonic manufacturing is trying to overcome today's limitations in flexibility of manufacturing systems by autonomous, decentralized and cooperative approach.

Fig 1 Invariants (fixed rules) and (flexible strategies) variants in different manufacturing configurations

The holonic system is composed from different types of holons. According to PROSA architecture ([1]), there are three basic types of holons: resource holon, order holon, product holon. Being constrained by the length of the paper we will not present each type of holon and the relationship among them. We just mention that each type has well a determined function; each function has similarities with the elements of a traditional manufacturing system. Beside the basic holons in PROSA architecture appears the notion of staff holons, which assist the basic holons in performing their work.
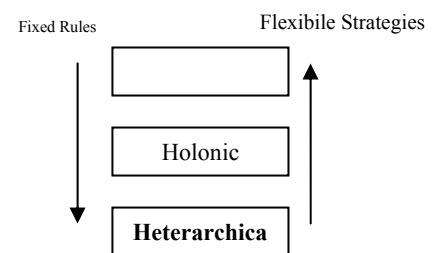
The holon posses the basic characteristics of autonomy and co-operation, whereby it is capable of planning and executing for itself. Furthermore, the co-operation capability enables it to co-operate with other holons in order to achieve a common goal or objective. Holons are aggregated in to holarchies. The holarchies describe the dynamic hierarchies of a Holonic System and throughout the life cycle of a Holonic System these dynamical hierarchies will be created and deleted on a regular basis as a response to the current situation. We expect from a HMS to combine the best of hierarchical and heterarchical control. It shall combine the high and predictable performance promised by hierarchical systems with the robustness against disturbances and the agility of heterarchical systems. The HMS must be consequent, re-configurable, self-configuring, learning and self-organising. The increased flexibility resulting from an agile and re-configurable manufacturing system, holons shall autonomously select appropriate parameter settings, find their own strategies and build their own structure.

An extremely important characteristic of the HMS is that they preserve a place for the humans in the system. They are the most flexible, and intelligent components in the system. A detailed description of holons, holarchy, HMS etc. can be found in [1], [11] etc.

Holonic systems were found to deliver better performance in a wider range of situations than their more conventional counterparts. One of the most promising feature of the holonic approach is that it represents a transition between fully hierarchical and heterarchical systems.

1.3. Fractal Manufacturing System (FrMS) (Warnecke, 1993)

The FrMS is comprised of a number of "basic components", which consists of five functional modules: an observer, an analyzer, an organizer, a resolver, and a reporter. The resulting architecture has a high degree of self-similarity, one of the main characteristics of a fractal.

Automatic reconfiguration of a system through a dynamic restructuring process is the most distinctive characteristic of the FrMS. This includes re-configurable hardware and external layout design, and also re-

configurable interior structure of software components that can be reorganized with software manipulations. The function of a fractal is not specifically designated at the time of its first installation in the FrMS. The reconfiguration includes situations where the agents' enrolments are changed, meaning that the agents are assigned a new goal and new jobs, but their composition does not change. Every controller at every level in the system has a self-similar functional structure composed of functional modules. In addition, each of these modules, regardless of its hierarchical level, consists of a set of agents. After the initial setup of a system, the configuration of the system may need to be reorganized in response to unexpected events such as machine breakdown. The system will also need to be reconfigured when the set of parts to be produced in the system changes due to a change in customer needs. In these cases, fractals in the FrMS autonomously and dynamically change their structure, via the actions of agents for the appropriate working mechanisms of the fractals.
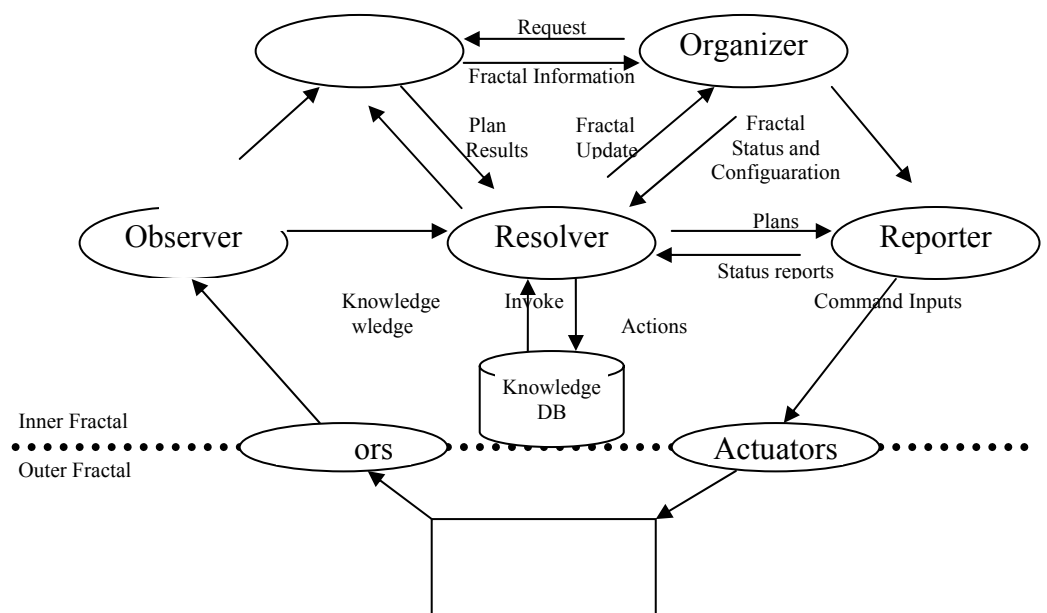
Despite the many conceptual advantages of the FrMS, it has not been successfully elaborated and implemented.

1.4. Bionic Manufacturing Systems (Ueda, 1992)

Biological Manufacturing systems are being exercised intensively at the Kobe University where, firstly, modelling of manufacturing system at a floor level based on evolution and self-organization implementing biological analogies (Ueda et al. 1997).

Biological organisms and manufacturing facilities are both examples of complex systems that exist in changing environments. The purpose of the research is to examine some possible analogies from nature and to discuss their relevance to engineering systems. The biological systems with their adaptive and self-organising feature represent a challenging alternative to the present hierarchical manufacturing systems.

There has been a long held popular view that technical processes such as design may be partially controlled by evolutionary forces. It is

well known that nature has produced complex shapes that are well adapted to their environment. The mechanism for this evolution of shape is not well understood however near perfect geometric shapes may be produced but there are no drawings or mathematical expressions that are encoded in any explicit way in an organism. In BMS model, the manufacturing system is considered like a
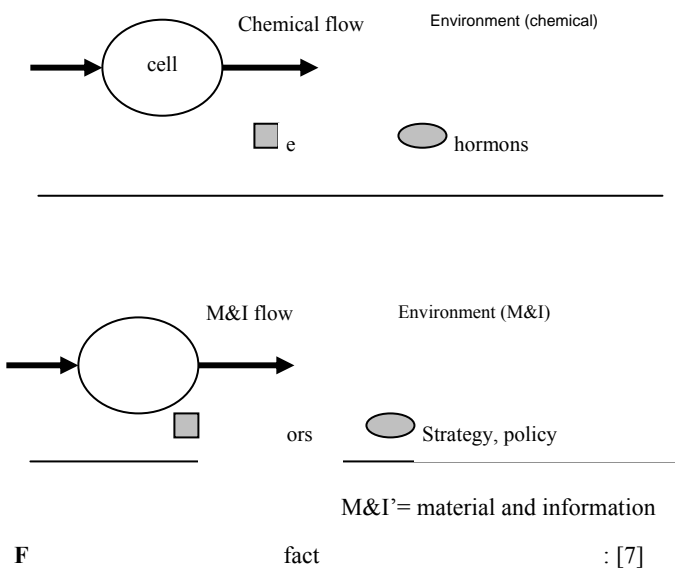
living organism, which reacts with the environment and creates products. According to this concept each system has it's own "genetic code" which describes the system. In the BMS system there are present all the selections, mutations like in the case of the living systems. The weak point of the model consists of the absence of the correspondence of genes (the element responsible for the mutations and selections in the living organism) in the manufacturing system. Even so, this model has already some practical applications in the Japanese industry.

1.5. Comparison of the manufacturing paradigms

Nevertheless, although these remarkable concepts have distinctive approach, they share some **common characteristics**. These are:

- decentralization of decision making;
- recursive whole-part relations architecture;
- building blocks as autonomous entities with co-operative and intelligent behaviour;
- continuous adaptation to the state of the environment;
- hierarchical and lateral co-ordination based on enhanced communication;
- flexible re-configurable organizational structure;
- self organization;
- domain specific knowledge; learning.

In the **table 1** we present a comparison of the key characteristics of emerging approaches in these manufacturing system models:

Concept Features Adaptive	Holonic Manufacturing System	Bionic Manufacturing System	Fractal Factory
Building block(entities)	Holon	Cell	Fractal
Internal structure of a building block	Pre-defined	Evolution	Evolution
Ontology	Holarchy, Whole-part relations	Layered – organic structure	Symbiosis of a fractal and environment
Structural Composition	Functional decomposition of a system, Process oriented	Self organization- genesis	Self structuring
Planning and Control	Basic higher level planning, plan refinement concurrently through communication	Concurrent response to actual situation	Dynamic goal revision
Co-ordination	Communication agents	Enzymatic operators in common space of communication	Communication network
Role of human	Constituent of a holon	Not precisely assigned	Constituent of a fractal
Scientific method	Agent theory	Genetic algorithms, Neural networks, A-Life	Theory of chaos
Particularities	Autonomy, Dynamic clustering, Co-operation	Organic structuring based on DNA-type of information	Self organization and growth, Navigational principal of co- ordination
References	Yoshikawa 1992	Okino 1993, Ueda1993	Warnecke 1993

The above references are not exhausted. There are several other similarities between these experiments.

2. Examples of some manufacturing concepts with considerable influence on new production management paradigms

2.1. Lean Manufacturing

The lean manufacturing concept makes possible to obtain a product that is adapted to actual demand using minimum amount of resources. It accepts only those activities that add value to the product, and minimalize the carriage, transport, eliminates stocks of all kind, same to JIT. The JIT, (Just in Time) concept, is already a mature concept (it was developed almost 30 years ago), so will not be presented in this paper due length limitations.

Optimisation in lean production is usually a series of goal concentrated approaches. From production line planning to management, from supply chain to quality control, from sales to technical support, all aim at the long-term high-efficiency goal. In Lean Production mode any problem is solved on the production line by trace back to its ultimate reason. The traditional manufacturing concepts often neglected the links among reaction policies. This happened in Ford's mass production, when workers were considered as machines just react to the production plan schemed by the engineers. Large amount of defected products went out of the production line and had to get ad hoc fixing.

Lean manufacturing focuses on reducing waste or fat in an organisation, including non-value added activities, unnecessary inventory and resources through the application of just-in-time, concurrent engineering, total quality management and improved customer–supplier relationships. As a result, the operation becomes more efficient increasing yield and reducing costs and lead-times.

2.2. Pheromone based manufacturing control system

Ant algorithms were inspired by the observation of real ant colonies. Ants are social insects, that live in colonies and whose behaviour is directed more to the survival of the colony as a whole than to that of a single individual component of the colony. Social insects have captured the attention of many scientists because of the high structuration level their colonies can achieve, especially when compared to the relative simplicity of the colony's individuals. An important and interesting behaviour of ant colonies is their foraging behaviour, and, in particular, how ants can find shortest paths between food sources and their nest. While walking from food sources to the nest and vice versa, ants deposit on the ground a substance called pheromone, forming in this way a pheromone trail. Ants can smell pheromone and, when choosing their way, they tend to choose, in

probability, paths marked by strong pheromone concentrations. Ant societies use their environment to guide the behaviour of single ants. The principles of this concept are: Pheromones are information carriers and have the properties 'strength' and 'evaporation over time'. Ants act in this pheromone-enriched environment and fulfil certain tasks of food foraging and nest building. An ant takes on four different roles in pursuing these tasks:

- it acts as a problem solver in finding food and transporting it back to the nest

- it is an information observer/interpreter, because it observes pheromones and interprets the strength of the scent, which is created by accumulated pheromones

- it is an information creator, as it produces the pheromones, which encode the information that attracts other ants to food sources

- it is an information spreader, as it constantly drops pheromones on its way back from a food source to the nest, which creates and reinforces the scent of pheromone trails.

Derived from the described principles and properties, 'pheromone-based' co-ordination of ants shows following benefits:

- simple coordination mechanism: ants interact with the environment in a standard and simple way and not with each other. This adds certain benefits to the social life of these insects: ants concentrate on posing information into and retrieving it from the environment, they do not care about the state of other ants. Because of this simple interfacing to the insect society ants can easily join and leave without disturbing the society — there is no need to inform all other ants.

- automatic 'guidance' to the optimal solution: the exploration of the ants (random walk) guarantees that the society shows robust behaviour. The spreading of global information (trails to food sources) and the feedback on the behaviour of the ant society (ants are attracted by scents) guides the system towards a solution, which is `optimised' but not necessarily optimal.

- capability to handle dynamic situations: because of the simple coordination mechanism, a simple `reconfiguration' of the ant society is possible, leads to an easy reconfigurability of a control system.

All of these theoretical advantages are extremely promising. If the practical solutions will confirm, a revolutionary communication paradigm is about to born. According to this, all agents operate within an information distribution environment, where information is made available in the form of 'artificial pheromones'. The weak points, at this moment, of the practical applications are: the systems needs permanent tuning and feedback, the spreading speed generally is not enough- as consequence sub-optimal results might appear-, the overall performance of the system strongly

depends on the number of pheromone types and the 'evaporation over time'. At this moment the author knows about a valid application at Daimler Chrysler, more precisely in a paint shop of one their factory located in Germany.

3. Possible applications in non-industrial fields

Even if, all of these paradigms were created for the management of industrial processes, the results can be used in other activity fields. The majority of the manufacturing systems, have the following characteristics: there are complex, open systems (interact with the exterior), stochastic, self-regulating, self-organizing, microeconomic, with discrete events. From organizational point of view, they are different only in few from other complex systems. Being in permanent competition, time and market pressure, the developed methods surely are ready to be also tested in other activity fields, such social sciences, public administration, health and education. In the following we present a short example concerning a possible educational application.

The notion of a learning society has been promoted as the next stage of evolution of the educational system, which enable people to learn continuously for the rest of their lives. The move to a learning society requires changes in personal attitudes and the educational infrastructure. It also requires major technological support to provide open access to a learning environment for all people, in all places at all times. In [6] is presented the development of the Learning Web, an agent-oriented network supporting knowledge access, collaboration and simulation, in order to provide a widely accessible learning environment. The essence of the Learning Web environment is an open architecture supporting integration of heterogeneous subsystems. The term *environment* is used here, initially, rather than *system*, because this learning environment will become part of the accepted surroundings and no longer viewed as an artificial tool, mechanism, or system developed to aid learning. What makes this 'learning environment' possible is an emerging paradigm, which will transform society, according some authors, as radically as did the coming of steam power and the industrial revolution. This is the paradigm of the computer-based *intelligent agent* developing from research in distributed artificial intelligence. By integrating this new approach with recent developments in telecommunications, distributed computing, knowledge databases, language translators, and multimedia systems, a transparent 'learning environment' can be created which will allow the often-foretold *learning society* (Boshier, 1980) to become a reality.

Conclusions

In the paper, we presented very briefly some of the most well-known manufacturing system paradigms. The length of the paper not allowed to analyse the possible implications on the

Romanian industry. Being involved in the global market competition, it is predictable, that the first local application soon might appear.

We can conclude, that the next generation manufacturing systems will be more strongly time-oriented, while still focusing on cost and quality, agile, decentralizated, having autonomous entities with co-operative and intelligent behaviour, flexible re-configurable organizational structure. Worldwide the future work focuses on the practical development of the ideas introduced by these models. The key issues are: shop floor control, scheduling, production planning, web-based manufacturing.

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MANAGERIAL DECISION

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Defining and setting the part of the decission:

In management, the purpose of the decision action, consist in the aware course of economical and social activity of the firm. The decision represents an essential element of management, being the most important utterance instrument, in oppinion of many authors. The decision is the principlal feature of the management, it's most active, dinamic _expression,throughout which it practise it's functions.

The decision involves several elements, such as:

1. one or more objectives;
2. the identfication of several variants for achieving the goals;
3. choosing or selecting, aware optional process for one of the main achievements.

The solution of a decision problem involves two main actions: settling and defining the decisional problem (if there is a decisional need) and choosing the right solution which in those circumstances should satisfy in the best way possible the objectives of the one who's making the decision. In all decision circumstances there are several action posibilities, cases which are found in the decisional variants. The evaluation and the comparing from several ponits of view, contribute to the finalizing of the rational choice and the optimal variant. Regarding to the need of decisional variants and the part of the decident in the decisional process, is good to know Gheorghe Boldur statement:"Praxiologically speaking, the variants of a decisional problem represents the resources of the decident, of which he can take advantage lucidly. The decident has the liberty of choosing one of the variants, being objectives, indepentent of his will"

In the management process, the decisions are made knowing well the reality, being ultimate acts of the thinking process of the decident (individualy or colectively) and their urpose is to mentain the goal of the economical global system (the organisation) in a dinamic structure. As an ultimate product of the thinking process (individualy or colectively), the decision becomes an essential management process, this representing the act of transcending from thinking to taking action.

The role of the decisional system.

The decisional system accomplish in the company the following two main functions:

a. **it directs the general development of the firm and its components.**

The anticipations on which are based the development of company's activities are actually groups of strategic decisions, tactical or current through which the main objectives are established, the main ways of action for accomplishing them, as well as the human resourses, materials, financial and informational given. In concusion, the development of the firm is prefigured and directed by the plan decisions;

b. **launching the firm personell activities and its components.** Each person inside the company, as well as each compartment, has to accomplish the tasks based on the managers decisions, which precisely establish what is to do, where, how and in what ways, the restrictions and so on. throughout their decisions, mostly current and rarely tactical. Of course, between those two main functions of the decisional subsystem there are multiple interdependence, all together assuring the 'commands' ensemble, essential to the well going of the company in the complex conditions of the transition to the market economy.

The components of the managerial decision.

The main components of the managerial decision are: the decident; the object (task); the given informations; the variants based on the possible or imposed criteria; the multitude of the objective conditions state which caracterises the certainty degree, risk and uncertinty;the consequinces of the decisions taken localy or socialy; the main goal. Other specialists adds to these elements two more: the enviroment and the time.

The decident, the individual decisional factor or a participating organ, represents the main element, which through its will- starts the action and prevents the reactions of those who take place in the process.Throughout the decision the personell of the firm starts to work, making it action in a certain way, so that in the end they can obtain their goal. So the decision belongs to the human factor, and it reflects in life by the human too, being a volitional act, plus a personell imply.

In the decisional process, even while elaborating the decision, conflictual states take place, starting from establishing the eficiancy objectives, their justify, the goals; the decident starts an

single action from a number of other actions, which implies a big responsability. For every decision and decident, the optimization keeps the efficiancy, the main element for managing.

The complexity and the dinamics of the economical and social development need the magnifying of the components of decision capable of making the decident take the risk at his own will, for the greater ability of doing his present and future tasks, elaborating the mesures which come with the adoption of the decision; these mesures must assure the execution of the decision. A personnel with efficient leaders is recognized by the results, work and life's enviroment, the level of organization, the attitude and the intervention in difficult situations, creativity spirit and many others. The decident (individualy and colectively) is more of a subjective factor, but becouse it's the one that makes the decisional problem, it's evident that all the elements of the decision, as well as the decision itself, are influenced by some caractheristics of the level of competence. This is the main factor that makes the connection between the quality of the decident and the quality of the decision.

Regarding to the main decident, he has to have a leading democrat style behaviour: to know how to behave with the direct subordinate, with the employees in general, to gain their atention, to influence them in order to stimulate the responsable engagement in every action. Making the decison, the individual decident has to consider the following: the sphere of influence and the importance of the decision; to whom the decision is refered, to inform about the consequinces and so on.

The multitude of decision variants "Vm" this is an esential element, imposed by the definition of decision itself. When the problem is formed and the solution is researched only in one direction, which constitute only one variant, there is no way of satisfying the choice condition for every scientific based decision.

The variants have to be identified and made clearly, for making an ansamble orientation in the decision elaborating process. So the variants of a decisional problem represent ways of taking an action, ways of which the decident dispose for solving a formulate problem. The decident is free to choose one variant, which exists independently of his will, using many criterias which make possible their comparing.

The multitude of the estimating criterions "Cn" of the variants is the component that gives the general image of a decisional process, making possible the comparison of variants from diffrent points of view established by the decident. Based on the multitude of the diffrent points of view, the decident has to make a selection of variants based on the goals, and on the advantages.

Expressing the multitude of decision criterions is depending on the objectives followed by the decident. In order to, represent a criterion by the decident point of view, it has to fulfil the

following conditions: to individualize a size of the cantity and quality caractheristics (technical, economical, social and so on) of the multitude of variants, to be in conformity with the objectives followed by the decident, to be able to be a quantum for all the posible variants and not to depend on each other.

For establishing the list of decision criteriums, the decident will consider the multitude of variants, emphasizing, for each variant, the main advantages and disadvantages, from which later can be identified the estimating criterions. Lets say the variants are developing countries.

The multitude of estimating criterions consequinces of the variants is the decisional element which gives the quantity or quality criterion level for each variant. The level of the consequinces is established independently for each criterion and variant. The consequinces of a certain criterion for the studied multitude of the variants are between the minimum and maximum limits. Considering the nature of the criterion, the most favorable of unfavorable situation can be reached on maximum as well as on minimum.

For example, for a criterion such as the productivity of a certain worker, the maximal value would be more favorable and the minimal value would be more unfavorable, while in the medium number of conflicts-criterion is the other way around.

The way of expressing the consequinces is diffrent from one criterion to another. If the criterions are based on quantity, the consequinces are expressed in numbers, while the quality based criterions can be expressed in qualificatives (excelent, very good, good, satisfying, bad, very bad).

In conclusion, the multitude of consequinces is related to the multitude of criterions, being as many consequinces for a variant as estimating criterions. The size of the consequinces can be established by the given situation by which the decident is confronted. Naming the size of the consequinces is the result of practising the atribute and it is based on the extrapolation of the accumulated experience, on the knowledge of the realistic laws, on the exact technical-scientifical methods, on the statistics laws, on the prediction technics and so on.

Clasifying the decisions. 4 of the most important decision clasifications have been made by the following authors:

1 F. Hetman, *Les secrets des geants americans,* Paris, Seuil, 1969:

- *operational* - specific to the operational systems and subsystems;
- *conception* (orientation) - refers to the analyse, evaluation and giving the resourses, settled on preocupied functions mainly on assuring the efficienty.
- *prospective* - it applies on making the objectives, planning them, on scientific and technical research, in inovating functions mainly.

2 T.T. Paterson,*Theorie du management,* Paris, Gaulhier Villars, 1969:

- *vegetative* - elementary form of decision; in order to making this decision, the decident doesn't have to know the reason for doing that job. Doesn't have any role in taking the decision, the information already been imposed; the decident decides only the way operation elements vary. He is the unqualified worker.

- *automatical* - the decident is involved; he has to be in touch with the operations needed by the production process.Here the working people are semi-qualified. For example, a worker that need to put together two pieces, decides only how he's going to do the operation.

- *routine* - the decident has to know all the reglementations that causes this process; for deciding due to these reglementations (decided by someone else). It needs a specialized worker.

- *interpretation* - here the last decident doesn't judge 'why' and 'for what'; is the begining of creativity, anticipation, the interpretation part. These kind of persons needs to be found and promoted.

- *programming* - are made by compartment chiefs and so on; the establishment of the programs involves the good knowing of the management (administrative council).

- *political* - in the company's policy; every novelty has it's own policy, towards the goal; this way the other decisions become confusing.

3. Ansoff, ***Corporate strategy,*** Bungay, Suffolk, Pcnguin Book, 1970:

- *operational* - for example, leveling the resources, operation programming, supervising the performances, the control.

- *strategical* - regarding to the enviroment relations, the goal and the objectives.

- *administrational* - regarding to structuring the resources for creating a maximum achievement, structuring the authority relations and responsabilities, work and information, getting and developing the resources.

4. W.T. Morris, ***The analysis of management decisions,*** Homewood, Richard D. Irwin Inc. 1964:

regarding to the quantity of information:

- *in certainty circumstances* - complete information; there are no uncertainties.

- *in risk circumstaces* - for example the decision of the rulett player; has only a small quantity of information, as above.

- *in uncertianty circumstances* - not enough informaton.

regarding to the nature and duration of retrieving the financial resources:

- *operational* - caracterized by the fact that implies spendings that will be recovered in a near future and is about difrent ways of using the constant resources;

- *investments* - usualy reffers to instalations and equipments; it needs funds that can be recovered in a far future.

level or hierarchical steps – superiors, mediums, inferiors.

time - with flexible limits, frequency:

economically – possible, optimale

other criterions - anticipated and unpredictable, analitical and non analitical ans so on

Decision part in the management process

The decision part in the manegement process, determined in the first place, a magnifying of the decisional activity; The function of a system in agreement with the importance of the economical and social order are directly related with the qualities of decision; with it's help you can get the objectives and the ways of achieveing them; through it, you can determine the place of each organizational link - sub-unit and subject- in fiding the solution for the predicted tasks. With the help of the solutions, you can coordonate in space and time the resources, and that assures the rithm of solving the problems, it addapts to the perfectioning and correction needed for the efficient development of the action.

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MANAGEMENT CONTROLLING

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In order to assure the efficiency of the management activity, is necessary to organize a sistematical inspection for all the material and financial resources, for the economical processes and the obtained resoults. A good inspection means perfecting and strenghtening the ways of the achievement, inspectioning the main batches of the company, so that the inspection reaches the requirements of market economy.

The enterpriser is caracterized by a total control of the company need, which can affect his ability of ruling.In the management tasks, the inspection one has a big importance; in some companies it is very often (especially in the service department). These can lead to some comunication difficulties, to use the team concept and employees comitment. The traditional aproach for the control process has three steps:

1. measuring the company's performances;
2. comparing the results to the settled standards;
3. making some collective actions.

The role of management inspection is to maximize the parametters refering to the quantity and quality of the obtained results and the time it took. Mentaining these parametters to the maximum efficiancy is assured by:

a) Constant checking of the quantity results and the parametters;
b) Estimating the size and direction of the influence of diffrent factors which influence the caractheristics of these parametters;
c) Embracing the correction measures and watching their effects.

Watching the stability mentainance of the foresight and achievements, measuring the

performance and comparing them to the plans, assuring the right informations in order to lead them to the inspection measures, the control is an important side of management, like an sub-system.

The specific role of the control is mentaining the actual ways due to the established parametters, discovering the delaying and acelerating factors, and promoting the positive effects factors.

The inspection role.

Inspection role means achieving the management goals. Inspection role is not only establishing the errors in management activity, but also the positive effects which reffers to the right action and making it achieve the strategic and tactical goals.

The main inspection roles are:

1. estimating the results, throughout which, close to the results measurements findings, as estimating by comparing the results to the objectives and standards initially established, and the causes that determined them;

2. the recovering function, determined by control's orientation not only to realizing and estimating the facts, but also the corectioning imposed by letting beside the deficiencies and the causes that generated them;

3. the preventive function, takes action before the deviation of the values, not after they took place;

4. the informative function, he informations given by the inspection, assures data about the way the decisions are taken, about some aspects of the company;

5. the educational-stimulus fuction which come from the fact that the control activities, action like forces that stimulates the efforts of the companies for getting over the present situations and obtaining some superior economical results.

The inspection is not a goal itself, but a link of the managerial act, it contribute to the eficiency of all actions. Assuring the growth of individual and collective responsability, the inspection purpose is to make the activities achieve the goals. So the purpose of the inspection is to evaluate the objectives, then the results, using the same techinics, ways and instruments, verifying the reached levels. In other ways, inspection is right after coordonation, and in the managerial process, after decision and command, and it makes the connection between the first step and the action. Therefore, making he decision work, is the main goal of the inspection, making better the managers experience, and another objective is to assure and defend the interests of the company, making it evolve. The inspection's objectives can only be understood in their interdependent complexity with the entire managerial activity, it's role being to raise the guarantee of actions in the

managerial process. It should not be mistaken, the objective with the object of control, which is practically unlimited, especially compared with the processes of execution, situations and problems, factors, deviations of inspection content.

The special role of inspection is that it helps in realizing, and getting solutions to the problems of managerial factors. The immediat intervention of evident solutions for preventing negative effects, is the most semnificative way the inspection can solve the problems of the company and of the firm.

The pshychological problems of inspection.

The way the inspection of managerial activities takes place, has deep psychological implications. In this process there are alot of complexe relations between the one that inspects and the one that is being inspected. From the managerial point of view, the inspection represents the way of taking its decisions. The goal is to make the worker think that is permanentely supervised and overlooked.

Every worker thinks about what he has to do, about the conditions in which he works, the posibilities of makeing work easier. It's best that the employees are encurajed to expose their ideas, the best ideas are going to be followed.

Another psychological aspect of the content is that the employee is solving the tasks in a superior way when he knows he is supervised. The inspector has to know that fact and has to complete the supervising with the control of the execution so that he can tell the capacity, the work and the worth of the employees.

In the inspection process, the manager has to be close to the one that is being controlled, to show a great spirit of friendship through which he should assure the right relations between the employees and himself, the right way of knowing the employees, of their capabilities, of a continuous development of the human factor and his participation in the general effort of making the activity of the company of trade or turism, more efficient.

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E-GOVERNMENT APPLICATIONS TOWARDS
AN INFORMATION SOCIETY

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Abstract: *This paper aims at proposing:*

(a) Framework for debate within a roundtable discussion;

(b) Recommendations regarding priorities, preliminary plans and initiatives that address the key issues and tackle the identified problems in building the Information Society.

This paper is organized into four parts. The first part highlights the principles of Information Society. The second part introduces e-government along with a listing of its goals, classifications, and different development stages. A suggested list of potential projects is provided to enable readers to familiarize themselves with the breadth of e-government applications, and how the latter creates value for the identified Information Society principles. The third part proposes a draft for national and regional priorities, initiatives and suggested e-government pilot projects. At the end, a conclusion summarizes the main issues in this paper.

I. INTRODUCTION: PRINCIPLES OF THE INFORMATION SOCIETY

In its attempts to adopt a universal definition for the "Information Society", is targeting to involve all stakeholders in developing a common vision and understanding of the Information Society and in creating a strategic plan of action to realize this vision for the benefit of all humanity. As such several prominent policy exercises including a list of principles for the Information Society. The main principles are:

- *Human resources training and development:* this principle ensures that every citizen should be equipped with enough skills to be involved in the Information Society;

- *Universal access:* this principle stresses the importance that information needs to be extended to everyone. The public has the right to access basic and relevant information of all aspects of the society;

- *Infrastructure development:* this principle affirms the need to develop affordable, secure, and reliable information and communication infrastructure on a national level with an efficient connectivity to global networks;

- *Formulation and implementation of national ICT strategies:* this principle involves government to develop national political commitment tailored to the specific requirements of their countries, and thus to participate in the transition to the Information Society;

- *Formulation of coherent regulatory and legislative rules:* this principle touches on the new changes needed to deal with the problems and issues of the information age in order to attract investment and fight corruption; the legal framework should handle intellectual property rights, consumer protection, confidentiality and disclosure rules. The regulatory will handle competition, taxation, customs, jurisdiction, and conflict resolution.

- *Development of applications and content suited to local needs:* this principle acknowledges the importance of developing applications using local languages. Most important ones are e-learning, e-health, e-government, e-commerce, and e-business.

II. E-GOVERNMENT CONTRIBUTIONS TO THE INFORMATION SOCIETY
A. DEFINITION OF E-GOVERNMENT

There is no unique definition for e-government. However, the most common definition is the following: E-government, or electronic government, refers to the use of information and communications technologies to improve the efficiency, effectiveness, transparency and accountability of government. E-government is also a tool to enhance the economic competitiveness of businesses and to empower citizens.

B. OVERVIEW OF E-GOVERNMENT

Traditionally, citizens and businesses interacted with government agencies in a government office. With the coming of the information age, it is now possible to deliver governmental services closer to the citizen though the use of personal computer in the home or office, or through the use of kiosks in public spaces.

E-government strives for a better delivery of government services to citizens, for an improved interaction with business and industry, for citizen empowerment through access to information, and for a more efficient government management. As a result, e-government direct impact on the economy and society can be less corruption, increased transparency, greater convenience, revenue growth, and/or cost reductions.

C. E-GOVERNMENT BENEFITS

The following benefits are recognized as being associated with e-government applications:

- Better delivery of services and information to businesses and citizens;
- Creating new employment opportunities in public and private sectors;
- Reducing poverty and illiteracy;
- Transparency of government;
- Public sector reform and anticorruption;
- Empowerment through access to information;
- Improving efficiency in government processing;
- Bridging the "digital divide";
- Contributing to a knowledge-based economy.

D. CLASSIFICATION OF E-GOVERNMENT SOLUTIONS BY SECTOR

E-government solutions are so diversified due to the variety and breadth of government services. In order to better identify and analyze these solutions, it is better to organize them into the following classes (figure 1):

Figure 1
E-government solutions classifications
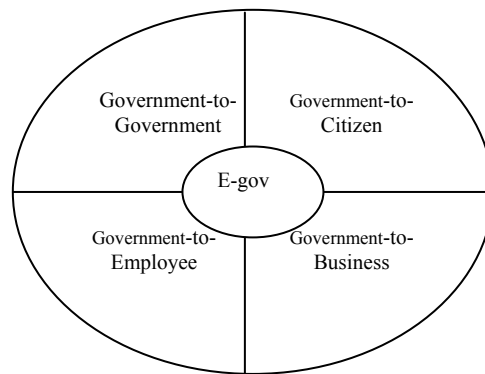
1. Government-to-Government (G2G)

G2G aims at serving both intra and inter-government agencies within a nation and among nations. It is sometimes suggested that government ought to improve and upgrade their internal systems and procedures before electronically transacting with citizens and business; thus making G2G the backbone of egovernment. Some G2G applications: inter-agency payments, procurement, and standardized forms.

2. Government-to-Business (G2B)

G2B aims at serving the business sector. It usually receives support because it has a direct impact on the private sector and reduces the cost of conducting transactions with the government. Some G2B applications: procurement, taxation, and licensing.

3. Government-to-Citizen (G2C)

G2C aims at serving the citizen. It facilitate citizen interaction with government by enhancing access to public information through the use of websites and/or kiosks, by reducing the time and cost to conduct a transaction, by attenuating the agency-centric nature of some government functions. G2C is perceived to be the primary goal of e-government. Some government are currently offering a one-stop shopping site for the citizens. Some G2C applications can be civil registration, health, education, and municipal services.

4. Government-to-Employee (G2E)

G2E aims at serving government employees. It usually based on the use of the Intranet/Internet. Some G2E solution is the implementation of a human resource management system with self service functionalities that allows the employee to apply online for a annual leave, check his total number the balance of his remaining vacation, and review his review his salary slip among other things.

E. CLASSIFICATION OF E-GOVERNMENT ACCORDING TO THEIR STAGE OF DEVELOPMENT

E-government has evolved through four stages: presence, interaction, transaction, and transformation as illustrated in figure 2.

Figure 2
Stages of e-government development
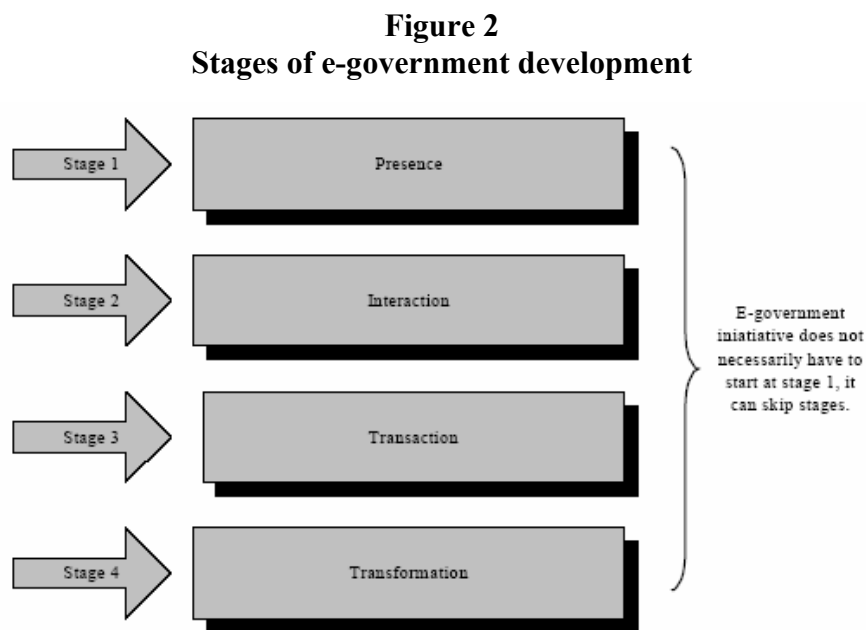
1. Presence

The first stage is presence. It is easy and cheap to implement, as it is the most basic level of entry for egovernment. A typical example is a web site that lists information on the agency, such as hours of operations, address, phone numbers, and contact person. It has no interaction capabilities. It could be compared to an electronic brochure presenting passive information.

2. Interaction

The second stage is interaction. It helps the citizen avoid a trip to the government office or even make a phone call by providing him with the needed information and the electronic forms that can be filled electronically or printed and then sent by mail.

3. Transaction

The third stage is transaction. It automates government functions and has more streamline capabilities. This stage is more complex and more expensive to implement. It is somehow a self-service operation that allows the citizen to conduct tasks such as completing electronically a license renewal or paying taxes. The activity involved in this stage is usually one way either to government or to client depending on the activity.

4. Transformation

The fourth stage is transformation. It is the most difficult to implement due to technical, fiscal and administrative constraints. It uses workflow and collaborative tools to streamline information in both direction to and from federal agencies and citizens. It removes barriers and promotes customer-oriented solutions. This stage has a major impact in the way current governmental agencies are organized; it will transform the existing structure, laws, and procedures and pave the way for a new virtual organizations.

F. OBSERVED GOVERNMENT STRUCTURE FOR IMPLEMENTING ICTS STRATEGY

Government should establish an organizational structure that ensures proper mechanism for delivering e-government strategy to decision-makers and planners, and at a later stage for implementing viable corresponding solutions.

Most Est countries adopt one of the following three organizational structures:

  (a) A Ministry of Information and Communications ;

  (b) A High level authority figure championing e-government solutions ;

  (c) A government body headed by a high level authority and composed of several ministers.

Thorough studies must be conducted for each of the above organization structure, taking into consideration the government-enabling environment; however, model (a) is a structure mostly found in developed countries and newly industrial countries.

### G. PROMOTING E-GOVERNMENT TOWARDS AN INFORMATION SOCIETY

E-government applications are used to offer greater convenience to the citizen and the business society by providing more governmental transparency. E-government solutions have been successfully used in a number of countries in the world to fight corruption, introduce administrative reform, and contribute to revenue growth and /or cost reduction.

The efforts of the government should be geared towards creating an enabling framework and political will to improve connectivity and enhance efficiency of private and public services (including rural areas).

Figure 3 below maps e-government contributions towards an Information Society. Three layers constitute the building blocks of this diagram:

- Layer one highlights the effect of e-government in the transition towards an Information Society.

- Layer two portrays main stakeholders and respective vertical line of business;

- Layer three lists main benefits for each stakeholder.

Figure 3
E-government contributions to the Information Society
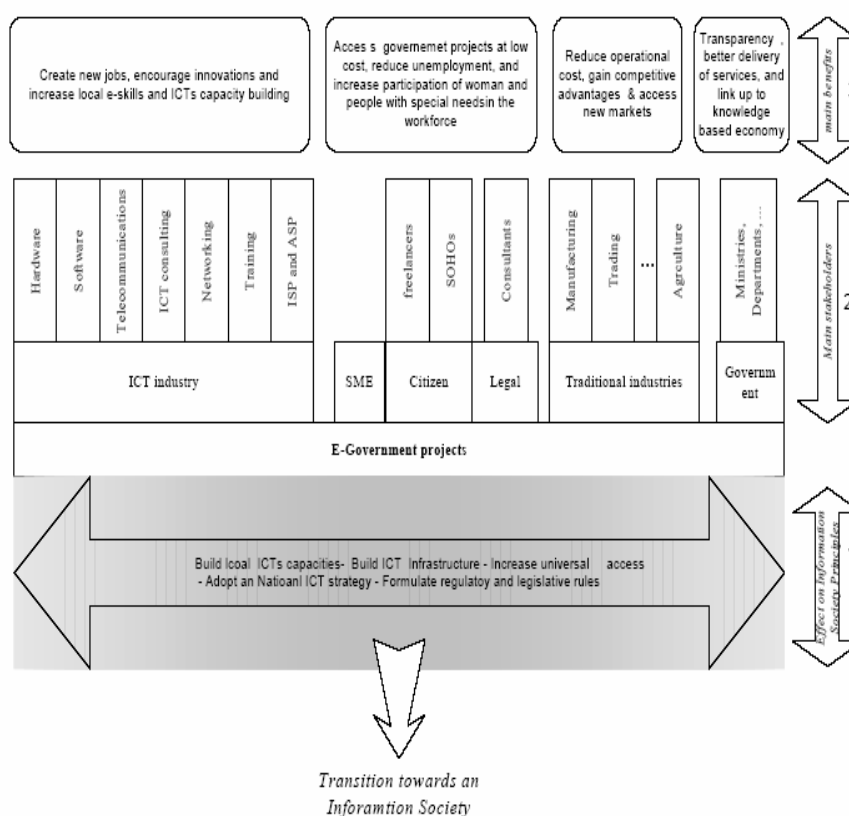
A list of the most accepted solutions has been prepared, to choose from based on their priorities:

1. Government-to-Citizen:

Income taxes, job search services, social security, personal documents, car registration, application for building permission, declaration to the police, public libraries, certificates enrolment into higher education, announcement of moving, health related services, and employment services.

2. Government-to-Business:

Government interactions with businesses could be grouped into three main functions as shown in table 1.

Table 1
G2B interactions with the business sector

Administration	Trade	Marketing
-Regulations -Taxes (Corporation tax VAT) -License renewal -Business registration -Social contribution for employees -Submission of data -Environment-related permit	-Government procurement -Import/Export Customs -Regulations	-Trade and investment promotion -Alliances with other countries

3. Government-to-Government:

Linking government network authorities together, and budget preparation and Control.

4. Government-to-Employee:

Human Resources Management, financial back office Enterprise Resource Planning (ERP), and property management.

III. PRIORITIES FOR NATIONAL ACTION PLANS

A. INTRODUCTION

National ICTs strategy: As a general rule to build an Information Society, national ICTs strategy should take into consideration the following objectives:

(a) Increase widespread availability of low cost, high speed Internet access;

(b) Enhance effectiveness and efficiency of government systems;

(c) Link up to a knowledge based economy by developing a sound Information Society foundation;

(d) Increase transparency of its services.

These objectives takes into account a very large number of factors linked to a country's socioeconomic development; these factors include investment, finance, regulatory frameworks, development of human resources, infrastructures, government, education, health, industry, services, poverty and employment.

Legislative, regulatory and trade polices: Existing laws are not applicable or may be detrimental to the development of e-government. Government should operate in an environment where electronic signatures, electronic submission, electronic payment, intellectual property right, and data protection are all legislatively accepted and protected. In addition, regulatory and trade

policies should exist to encourage private sector to invest in ICTs. For example: (a) tax exemption of newly established ICTs firms for a defined period of time, (b) government subsidies for certain ICTs sector that require initial high investment, (c) deregulation of the telecomm sector, (d) privatization, (e) low tariffs on hardware and software imports, (f) and foreign exchange regime. However, before any legislative actions are taken the following four principles are essential for seif electronic transactions as illustrated in table 2.

Table 2
Four essential principles for electronic transaction

Principle	Description
Confidentiality	Keeping information private.
Authentication	Authentication is the process of determining whether someone is, in fact, who he is declared to be.
Integrity	Integrity is the assurance that information, in storage of in transit, can only be accessed or modified by those authorized to do so.
Non-Repudiation	The individual who undertook the transaction cannot subsequently deny at a later stage his or her intentions in the creation or transmission of the information

Infrastructure development: The building block for any e-government initiative is to deploy a national infrastructure with high bandwidth backbone and wide covering area. This infrastructure should (a) offer competitive pricing for telecommunications services, (b) integrate information, telecommunication, government ministries, and public institutions/department together; and (c) be equipped with required systems and networks needed for securing safe on-line transaction.

ICTs Human skills development: For effective use of ICTs, Est countries should invest in developing local human resources. Potential initiatives would be (a) increasing public expenditure on education and integrating e-learning in the national curricula, (b) providing incentives to reduce brain drain, (c) developing the private sector, (d) leveraging from technical assistance provided by international organizations, (e) and promoting research and development centers in alliance with both the education and the industry sectors.

Fight illiteracy: Even though this topic is related to e-learning, it is still a major handicap for bridging the digital divide and for diffusing ICTs services such as e-government and e-health. Thus, government should fight illiteracy in the region in order to equip people with the necessary skills to use and benefit from ICTs applications.

B. SUGGESTED IMPLEMENTATION MODEL

The suggested model is composed of three parts:

- Sectoral priorities;
- Model building blocks;
- Framework.

Sectoral priorities are derived from the national policy. Four priorities are illustrated at the bottom of figure 4. These priorities could be realized through a variety of building blocks organized in four groups. For example, a given priority might be realized by a consultation (transaction), conducted through a portal (channel), supported by knowledge base (e-business enablers), and requires Business Process Reengineering (organization development). This model allows the identification of *building block* gaps for different scenarios.

Once the previous steps are achieved, the model continues to complete the big picture by placing the eorganization building bocks and its sectoral priorities within the framework. The *framework* has a pyramid shape composed of five layers. Figure 4 identifies the five layers on the left-hand side of the pyramid and matches each layer with a typical main application on the right-hand side of the pyramid.

Figure 4
Suggested model
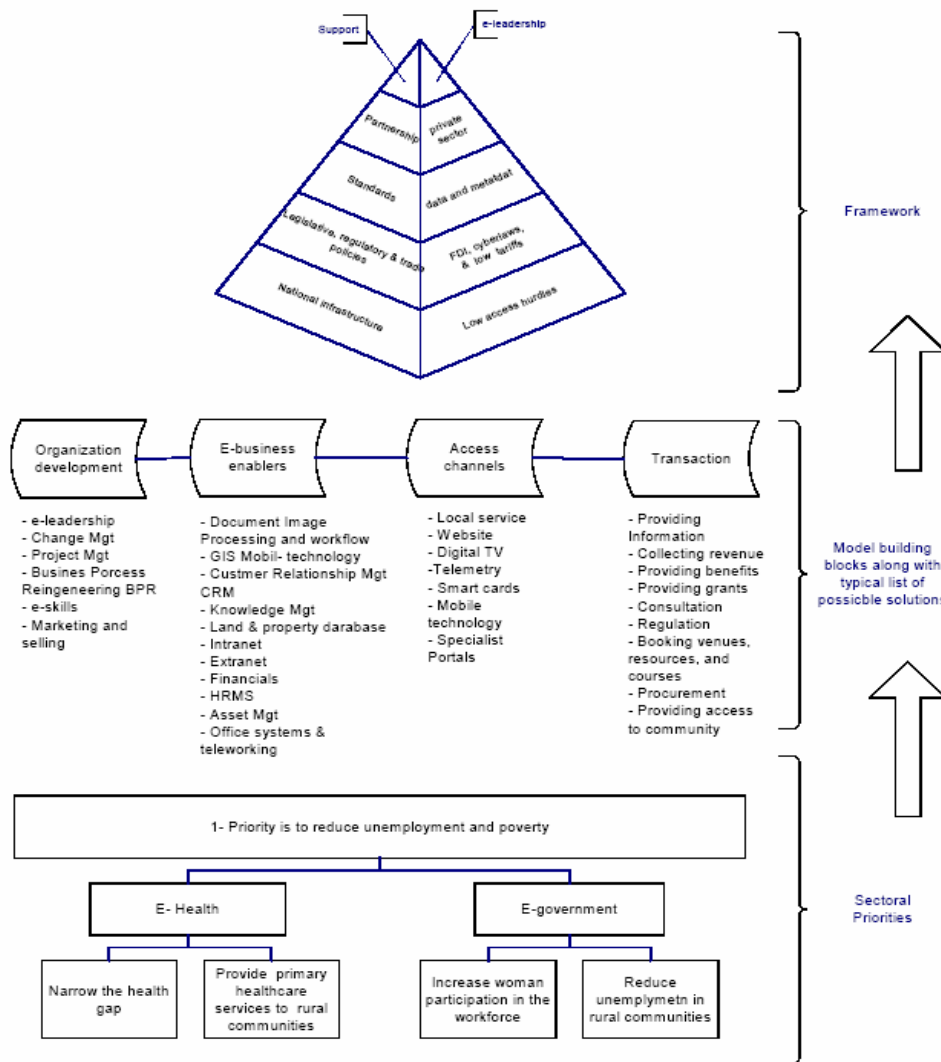
C. ROADMAP FOR GOVERNMENT ICT-BASED PROJECTS

This roadmap provides a high level framework for defining a strategy and for implementing government ICTs based projects. The seven major steps that constitute the pillars for this framework are: define a vision and priority areas, assessing e-gouverment readiness, fiind e-leadersand political will, select the right project, plan the right project, plan the maage e-gouvernment project, overcome resistance from within gouvernment, how to measure and communicate progress, keep relationship with private sector.

D. E-GOVERNMENT INITIATIVES TOWARDS AN INFORMATION SOCIETY

E-government initiatives can be grouped in five main areas as listed below:

1. Increase access: Providing access to all segments of the population enables community members to acquire information related to government services and plans. ICTs should be accessible though a wide diffusion of telephony and/or mobile lines especially in rural areas and by lowering access hurdles. Typical applications could be:

- Private cyber cafés;
- Centers equipped with phones, faxes, photocopies, PCs, printers and Internet;
- Public Internet Kiosks.

2. Important role of Public-Private Partnership: Public-Private Partnership (PPP) is becoming a popular method of implementing e-government projects and developing the ICTs industry. The advantages of forming such alliances lie in the ability to mobilize more capital and to use the private sector expertise in project management and efficient project expenditure. In return, the government will involve the private sector to contribute more in the development of the Information Society, while retaining its responsibilities for public interest matters and guaranteeing delivery of services. Implementation of technopoles and incubators are two approaches for supporting PPP.

3. Promote freeware/shareware: Development of software application based on freeware/shareware technology in EST member countries should be encouraged in order to (a) build local capacities in ICTs, (b) bridge the digital divide by providing cheaper solutions to mass market, (c) contribute to the growth of Information Society and knowledge-based economy, and (d) contribute to the growth of Small and Medium Enterprises (SMEs).

4. Administrative reform: E-government, e-health, or any other e-business initiatives should be accompanied by redesigning business processes, introducing quality and audit control mechanism, implementing an e-procurement system, and acquiring technical and project management skills.

5. Promote ICTs entrepreneurial development: The private sector and more specifically SME are a major source for job creation. EST countries should encourage entrepreneurial development by (a)

setting up ICTs incubators, technopoles, and technology parks, (b) attracting Venture Capitals (VCs) to invest in startup enterprises, (b) and removing taxes for at least a defined period of time on ICTs firms.

In all of the above, public and private sectors should implement an audit mechanism to assure quality and to measure the impact on poor population.

E. SUGGESTED PILOT PROJECTS

Government, which in most cases is the largest and wealthiest entity to conduct business with, has a duty to support initiatives towards an Information Society. So as an attempt to serve this duty, table 3 provides a list of potential e-government application.

The priorities for the region should be focused on three categories of e-government solutions namely, Government-to-Citizen (G2C), Government-to-Business (G2B), and Government-to-Government (G2G). The remaining category Government-to-Employees (G2E) has a less direct impact on citizens and businesses.

A major concern that needs to be taken into consideration before initiating any of the e-government projects is the centralization and standardization of the common data used by all ministries. In other words, basic information should have one database structure, well-defined metadata, and unique naming convention for data entry. The procedures for storing, accessing, and owning these data should be designed at the very beginning of any e-government initiative.

Table 3   Sample e-government applications

E-government application	short term 1-3 years	medium term 4-6 years	Long term 7-10 years	Impact on Employment	Poverty
Set an e-government policy and strategy	☑			low	-
Deregulate telecommunications	☑			high	low
Build Internet enabled infrastructure	☑			high	low
Develop static content for public information	☑			medium	-
Build and train local skills in public institutions	☑			medium	-
Initiate legal framework for e-government application	☑			low	-
Centralize and implement a governmental e-procurement application	☑			low	-
Build e-government portal site	☑			low	-
Market and promote usage of e-government solution to build trust	☑			-	-
Linking government network authorities together	☑			medium	low
Document Management and archiving system	☑			low	-
Tax and customs declaration	☑			low	-
Business registration and license renewal	☑			low	
On-line public library	☑			-	low
Job search and employment services	☑			low	low
Personal documents, announcement of moving, car registration	☑			low	-
Application for building permission	☑			-	-
Declaration to the police	☑			-	-
E-government ERP application: Financials, human resource management , property management, etc	☑	☑		high	low
Smart cards	☑	☑		low	low
Budget preparation and Control		☑		medium	-
Workflow		☑		low	-
Knowledge based systems		☑	☑	medium	-

The following table (table 4) elaborates on main functionalities of selected applications for the short and medium terms.

Table 4
Main functionalities of selected e-government components

E-government application	Main functionalities
Unified e-government Portal web site	Portal technologies can integrate content, applications, and processes together. Hence, it can deliver the following: ▪ Better communications and collaboration between government ministries/department, citizens, business, suppliers, partners, employees, and customers. ▪ Provide real-time access to information stored in different systems; ▪ Personalize each user interface and interaction with your business; ▪ Integrate and access relevant data application and business processes. The e-government portal will provide a broad range of services for citizens, business, government, and employees; it is usually structured along four gateways: ▪ Citizen gateway; ▪ Government gateway; ▪ Business gateway; ▪ Government employee gateway. It is much better to arrange the portal site around customer group's topics, instead of ministries/department names. General services included in the portal are the following: ▪ Single login service; ▪ Web access and processing of existing e-government solutions or e-services; ▪ Access to all government ministries/department sites; ▪ Access to government contracts, grants, and tenders; ▪ Ability to customize the portal to a customer need; ▪ Collaborative tools along the traditional e-mail services; ▪ Integration service that can effectively correct business processes and facilitate transactions among separate systems; ▪ Logical structure of information in order to facilitate site navigation; ▪ Frequently asked questions per section or topic; ▪ Support Arabic language with at least one other language; ▪ Citizen and business feedback section.
Centralized e-procurement application	This solution is intended to centralize all government procurement. It should be structured to serve municipalities, states, etc. However, the back-office should be centralized in order to: ▪ Reduce cost for suppliers and help SME increase their revenues; ▪ Control the entire bidding cycle from issuing a bid or quote, to posting bid award information online; ▪ Reduce labor, printing and postage costs related to document distribution; ▪ Keep up-to-date information on suppliers as they register, renew

E-government application	Main functionalities
	and maintain their account information online; ▪ Build bases for a future knowledge base system on supplier performance, bid prices, project budgeting, etc.
Document management, archiving, and workflow system	Document management and archiving systems are becoming common applications for governments and their functionalities are also becoming standards. However, what is becoming more important are the juridical aspects as listed below: ▪ The system should have reasonable controls to ensure integrity, accuracy and reliability; ▪ The system should provide some type of audit trail to prevent and detect unauthorized creation, modification, or deletion of documents; ▪ The system should have the ability to print copies of records; ▪ The system should have documentation on how the software works and how it has been set up; ▪ The system should be able to cross-reference with other systems; ▪ Archived records should be stored on unalterable media.

On the other hand, workflow systems complement the document management systems by automating business processes, during which documents are passed from one participant to another for action, based on a predefined set of procedural rules. Workflow systems improve efficiency, provide better process control, enhance citizen service, increase effectiveness of processes, and it is excellent tool to fight corruption. |
Business registration and license renewal	This application will enable business sector to conduct the following task on-line: ▪ Search for available business names; ▪ Search for businesses by name, principle, agent, type of business; ▪ Query businesses by products/service; ▪ Register new business; ▪ On-line guide for doing business; ▪ Renew licenses and professional permits; ▪ Create and modify commercial registers; ▪ Ability to remind businesses about annual renewal and expired licenses, and to inform them about new regulations; ▪ Etc
E-government Enterprise Resource Planning (ERP) application: Financials, Human resource management, property management, etc	Typical modules by application are the following: ▪ For the Financials suite: general ledger, payables, receivables, fixed assets, and cash management; ▪ For human resource management: personnel, payroll, recruitment, training, attendance, graphical organizational structure; ▪ For property management: leasing, renting, maintenance, and portfolio management.
Smart cards	"Smartcards" is another vital application to promote e-government and e-health applications. It can be used for both (a) off-line transactions where it will store personal and clinical data about the citizens and (b) on-line to provide access permissions for multiple applications.
Job search and	This application will assist citizens in:

IV. CONCLUSIONS

In summary, this paper highlights the impact of e-government applications in developing an Information Society. It recommends a list of priorities together with a roadmap and model for implementing e-government solutions. The paper is intended to setup a framework for further discussions and development of the initiatives and priorities mentioned in the above sections.

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REFLECTIONS SUR LES DEFIS DE LA DISTRIBUTION URBAINE DES MARCHANDISES

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Résumé: *L'épreuve présente quelques points de vue sur la distribution urbaine des marchandises. Les problèmes qui se posent dans l'espace urbaine sont les problèmes d'emplacement des centres de distribution, des plateformes logistiques et l'intégration dans le milieu urbain, le stockage des marchandises, la gestion de stocks, les problèmes de transport des marchandises en ville. La planification des ressources et des activités des entrepôts, les outils et méthodes visant à améliorer et automatiser l'approvisionnement en réduisant les stocks et les délais de livraison sont quelques éléments qui se posent dans la distribution des marchandises. Relatif au ce sujet sont présentées aussi de nouvelles approches pour les modèles de distribution urbaine, les fonctions des technologies d'informations et communications dans le système logistique de distribution, stratégies possibles dans la distribution des marchandises en ville.*

Le plus important élément dans la distribution physique, le transport de marchandises, concerne quelques problèmes dans l'espace urbain: la pollution atmosphérique, la pollution sonore et les problèmes de congestion du trafic. Pour résoudre les problèmes environnementales, de congestion du trafic dans les agglomérations urbaines se pose le problème de mise en place d'un plan de déplacement urbain qui inclue les problèmes relatifs à la distribution des marchandises par la réglementation d'accès dans l'espace urbaine, la gestion d'espace urbain, du stationnement et du temps d'accès, le chargement / déchargement des marchandises, l'établissement des horaires de livraison, les dimensions et les poids de véhicules, modes de gestion du transport par un collaboration public – privé.

L'impact des nouveaux services, tels que le commerce électronique, les livraisons à domicile de clients générées de ce type de transaction est présenté aussi parmi les défis de la distribution urbaine.

1. INTRODUCTION

La distribution urbaine des marchandises est un procès d'une complexité élevée par le grand nombre des éléments qui interviennent, les restrictions, les limites indues de l'espace urbaine.

La complexité dérive, en sus, par les différences qui se manifestent entre les agglomérations urbaines et dans l'espace de même ville, les différences entre les zones différentes. La configuration de ville, l'infrastructure existante, la surface, le nombre des habitants sont des éléments déterminants dans le choix d'une stratégie de distribution urbaine.

Pour cette raison, l'analyse des problèmes de distribution dans les zones urbaines, des restrictions relatives à distribution physique des produits, est nécessaire d'être réalisé à partir de moment de choix du type de chaîne de distribution.

Le problème de la distribution physique des marchandises en centre urbain ne peut être traité séparément des questions de circulation et de stationnement des véhicules de livraison.

L'accès dans l'espace urbaine peut être limité à quelques intervalles horaires. Ces limites d'accès sont introduites pour diminution le trafic urbaine dans les heures de pointe dues le transport de personnes. Aussi, les restrictions relatives à dimension et au type de véhicules de distribution urbaine accessibles dans les différentes zones urbaines sont éléments que doit pris en compte dans le choix de modèle de distribution urbaine.

Dans l'espace urbaine s'impose, aussi, l'utilisation des véhicules ne polluants ou avec émissions polluantes réduits. En sus, dans les diverses schémas de distribution urbaine est nécessaire la sollicitation de facteurs de chargement élevés pour les véhicules qu'entrent en ville.

La distribution urbaine des marchandises est prépondérant liée de transport routier. Les caractéristiques spatiales des zones urbaines et la grande densité de population en ces zones nécessitent l'utilisation des véhicules légères, surs, avec une manœuvrabilité élevée.

Les possibilités d'extension de l'infrastructure routière dans les agglomérations urbaine sont limitées, mais il est possible de développer le transport souterrain des marchandises ou de trouver de solutions de combiner le transport routier et le transport souterrain dans une variante de transport multimodal.

2. MODELES DE DISTRIBUTION URBAINE

La distribution urbaine des marchandises est un domaine vaste qui pose une multitude des problèmes pour les personnes qui régissent les activités de livraison dans l'espace urbaine.

Les services offerts de système de distribution urbaine sont:

✓ La livraison des marchandises aux magasins;

✓ Le stockage des marchandises dans les centres de distribution et la livraison à commande;

✓ La livraison des marchandises au domicile des clients;

✓ La collecte des produits retournés, la gestion des flux logistiques inverses.

Pour réaliser ces services existent différents schémas de distribution urbaine. Les schémas de distribution urbaine sont différents par le mode de localisation des centres de distribution, soit dans les zones périurbaines, soit dans les espaces urbaines.

CDR – centre de distribution régionale

CDL – centre de distribution locale

○ - points de livraison, magasins
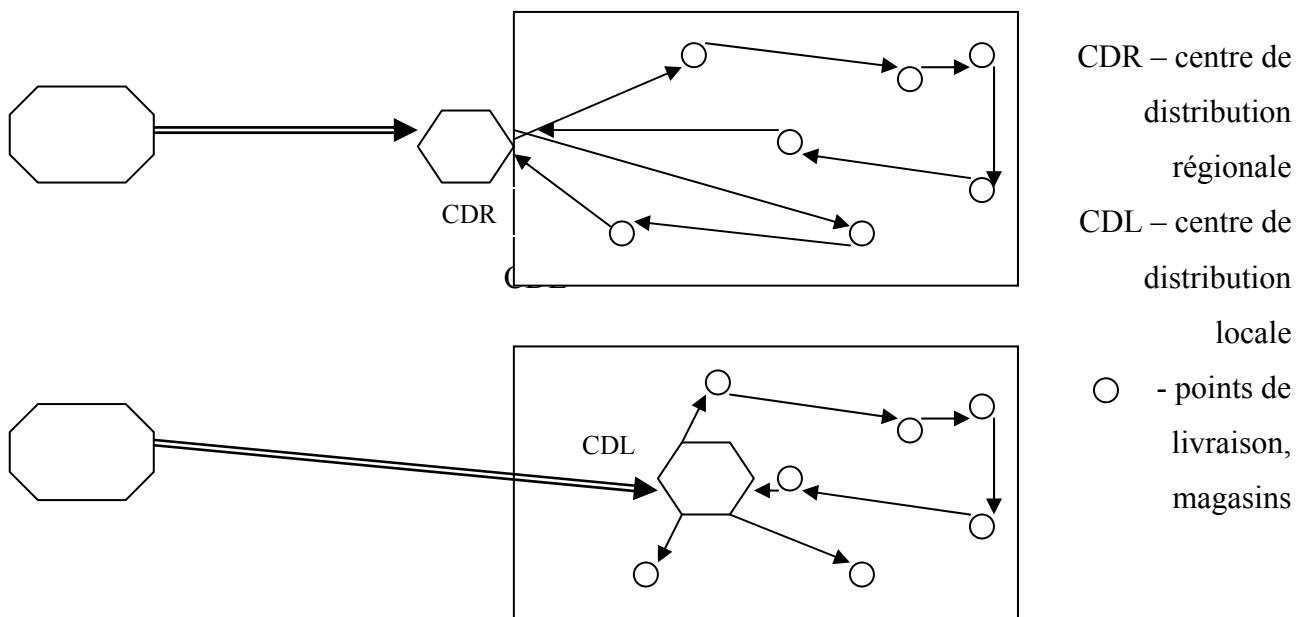
Fig. 1. Options d'emplacement des centres de distribution

Si, pour une grande période de temps, l'orientation a été vers la localisation de ces points de transfert dans la proximité des zones urbaines, la tendance actuelle est de placer ces points dans l'espace urbaine. Cet effet centripète de localisation des activités commerciales en ville est déterminé de l'attrait que constitue le centre ville comme instrument de stratégies de segmentation et de différenciation.

En sus, l'emplacement de centres de distribution dans l'espace urbaine réduit les distances parcourues de véhicules de livraison. La localisation des magasins de type supermarché ou hypermarché dans les zones centrales réduit aussi le trafic supplémentaire généré de voitures particulières.

Dans les grandes agglomérations urbaines le commerce de centre ville consiste en plusieurs hyper centres et d'une nombre de centres de quartier. Les hyper centres disposent d'une forte capacité d'attraction. Les centres de quartier ont une capacité très limitée d'attraction, desservant les personnes habitant ou travaillant dans le quartier.

Le commerce de périphérie est composé des centres commerciaux régionaux et des zones de d'activités commerciales et les produits commercialisés sont l'alimentation générale, l'équipement de personne, les services, matériaux de construction.

Pour détermination de dimension et la localisation des terminales logistiques ont été développées des modèles mathématiques basés sur la théorie des files d'attente et techniques de programmation ne linéaire tenant compte des conditions du trafic dans le réseau existante.

La modélisation de la distribution urbaine doit tenir compte que la distribution des marchandises se réalise dans un milieu complexe et dynamique, avec une multitude des contraintes. Les contraintes peuvent être classifiés aussi en contraintes invariables (caractéristiques physiques, infrastructure, réglementations légales) et contraintes que, dans certaines conditions, peuvent être modifiés (coûts, ressources). En sus, certaines restrictions sont opposées, contradictoires.

La réalisation de la distribution urbaine dans un milieu en continu changement suppose trouver des solutions optimales même en conditions des changements déterminés de milieu en qui ce procès est réalisé. Pour cette raison s'impose d'utilisation des modèles pour permettre renouveler les solution en temps réel, comme les modèles de routage dynamique, de refaire dynamique des horaires de livraison, dans les conditions des changements imprévues.

L'objectives de la modélisation de distribution urbaine sont l'optimisation des ressources et la minimisation des effets négatives sur l'environnement.

L'espace urbaine peut être divisé dans un nombre n zones de livraison. Pour ces zones peuvent être déterminés différents indicateurs qu'ils caractérisent une telle zone est la densité des points de livraison, le volume et le nombre de commandes, la distribution spatiale et temporelle de commandes. Dans autre parte, le nombre et les types des véhicules, qu'ils desservent la zone de livraison, les caractéristiques d'infrastructure, les facilites existantes, le coefficient de service sont des élément qu'ils doivent prendre en calcul.

La sectorisation des zones de distribution permet une analyse géographique des informations relatives la demande et l'adaptation des actions de marketing. En sus, elle crée la possibilité d'affichages des cartes interactives avec les itinéraires alternatives de distribution.

La distribution urbaine peut être formalisé comme un réseau avec liaisons multiples. Sur les arcs de réseau transitent les flux des marchandises et les nœuds principales représentent centres de transfère logistique. Les nœuds finals représentent les points de vente. Les centres de transfère

logistiques peuvent être entrepôts, plateformes logistiques, centre de transbordement, stockage et distribution. La connexion de réseau de distribution urbaine au réseau magistrale est réalisé dans les points de transfère régionale.

Les centres de distribution représentent terminales publiques ou privées de transbordement des marchandises et les parcs logistiques sont concentrations spatiales de centres de distribution et bases des fournisseurs des services logistiques.

L'introduction des centres de distribution urbaine coordonnées de compagnies logistiques spécialisées croît l'efficience des chaînes de distribution par la croissance de degré d'utilisation de capacité de transport, la diminution de distances parcourues, qu'ils ont comme effet la réduction de coûts du transport.
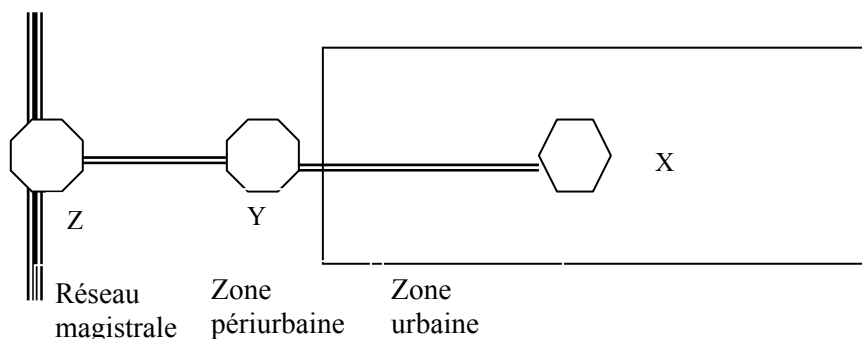
Fig. 2. Localisations de parcs logistiques

La localisation des parcs logistiques doit assurer services performants de distribution et une connectivité élevée dans toutes les zones de l'espace urbaine. Peuvent être prises en calcul les dernières locations pour les parcs logistiques:

➢ la location X, optimale quand ne se prisent pas en compte les coûts des terrains et les investissements en infrastructure dédié, utilisé pour la grande distribution de produits agroalimentaires;

➢ la variante Y est la variante la plus fréquente utilisée, mais qu'il induit des flux supplémentaires du trafic, généré des déplacements avec les voitures particulières;

➢ la location Z, solution optimale en rapport de position relative à réseau magistrale du transport, utilisé pour la distribution de matériaux de construction, meuble, etc.

Dans les conditions des nouvelles technologies de transbordement et transport peuvent être développées aussi combinassions de ces variantes et leur interconnections (par exemple, A et C).

Dans le cadre de la distribution urbaine il est nécessaire de faire une analyse en fonction des types de produits par ce que la distribution de différents produits est très variable. Les produits

principaux livrés dans l'espace urbaine sont les produits agroalimentaires, textiles, habillement, cosmétiques pharmacies, produits électriques et électroniques.

La fréquence et le nombre élevé des expéditions dans le domaine de distribution des produits agroalimentaires, le traçage des produits frais et des produits réfrigérés représentent quelques enjeux majeurs pour l'optimisation des livraisons. La distribution urbaine suppose l'utilisations des centres de distribution et la localisation des magasins de type super et hypermarché dans le centre ville.

Pour les produits textiles la distribution se caractérise par le développement des chaînes des magasins spécialisés.

La tendance dans la distribution des produits électroniques est au développement de schémas logistiques permettant de livrer directe les clients à partir d'un seul entrepôt, centre de distribution et d'optimiser la distribution à travers une politique de flux tendus.

3. LA LOGISTIQUE DE DISTRIBUTION DANS L'ESPACE URBAINE

Les éléments principaux visés pour le but d'optimisation de distribution urbaine sont:

➢ la gestion de stocks;

➢ la préparation des commandes pour les clients, que suppose la préparation des produits, la manutention au centre de distribution, l'emballage des produits à livrer;

➢ l'expédition, le transport et la livraison des marchandises.

Pour la mise en service et la gestion d'une chaîne de distribution est nécessaire d'assurer une logistique performante. La livraison dans les délais prévus les produits commandes suppose l'accès rapide aux informations actualisées en permanence sur le stock en magasins. La réduction du niveau des stocks en magasins se traduit, d'autre part, par la multiplication de réapprovisionnements.

Une solution pour la logistique des entrepôts peut constituer le système de gestion électronique. Les systèmes évolués de gestion des entrepôts combinent les technologies modernes d'identification de produit par saisie de codes de barre et les technologies d'information et communications qui permet l'utilisation d'un flux des informations actualisées en permanence.

L'utilisation des nouvelles technologies d'informations et des communications permet le passage d'une logistique de flux poussés à une logistique de flux tirés, qui détermine une diminution des coûts, par la centralisation des entrepôts, par les diminutions des stocks.

Pour réduire ses coûts de distribution, les dispacheurs utilisent des progiciels pour optimiser la planification des tournées de livraison mono ou multi dépôts. Il est nécessaire de prise en compte des contraintes telles que les heures d'ouverture des dépôts et des points de livraison, des plages

horaires de clients, les capacités des véhicules, les réglementations relatives aux déplacements des marchandises dans l'espace urbaine.

Dans les conditions d'existence d'une parc donnée des véhicules et d'entrepôts et des clients avec de restrictions de livraison, comme fenêtres de temps, l'optimisation de la distribution consiste en trouver de solutions pour réduire les coûts d'opérations, la distance parcourue, le nombre de véhicules et de maximiser la satisfaction des clients. La gestion de ces opérations se peut formaliser par une gamme élargit de méthodes, à partir des modèles d'optimisations combinatoires jusqu'à méthodes tel que programmation par contraintes, les recherches heuristiques.

Optimisation des itinéraires en fonction de la capacité des véhicules, des créneaux horaires, des périodes des pauses, des types de voies et des véhicules sont les défis qui se posent pour la distribution urbaine.

Un problème qui se pose dans la distribution urbaine des produits est la détermination d'impact, les influences de transport des marchandises sur le trafic urbain. Pour cette raison doit déterminer une série des indicateurs, comme les distances des routes de livraison, le temps total de transport, la vitesse moyenne, le consume de combustible, les émissions polluantes, le niveau de bruit.

La croissance du transport routier de marchandises détermine une série de problèmes comme la pollution sonore, la pollution atmosphérique, les congestions de trafic générées par les véhicules de livraison et l'extension des espaces occupés par les voitures aux points des livraisons des marchandises.

Pour résoudre les problèmes environnementales, de congestion du trafic dans les agglomérations urbaines se pose le problème de mise en place d'un plan de déplacement urbain qui inclue les problèmes relatifs à la distribution des marchandises par la réglementation d'accès dans l'espace urbaine, la gestion d'espace urbain, du stationnement et du temps d'accès, le chargement / déchargement des marchandises, l'établissement des horaires de livraison, les dimensions et les poids de véhicules, modes de gestion du transport par un collaboration public – privé.

L'une de problèmes est que les aires de livraison sont souvent de dimensions et localisations inadaptées que détermine arrêts sur voirie de véhicules en livraison et des encombrements qui réduit la fluidité du trafic. S'impose, donc, réglementations en ce qui concerne la gestion d'espace routier, de zones de parking et de zones de livraison de marchandises.

Le système de distribution peut être optimisé par le groupement des marchandises dans les terminales logistiques urbaines, l'introduction de technologies évoluées d'information et communication.

Les procèdes heuristiques développés récent permettent l'obtention simultanément de solutions approximatives optimales pour les problèmes d'emplacement des terminales urbains et le design de routes pour un nombre existantes des points de livraison. Les problèmes de routage consistent en trouver des routes qui minimisent les distances parcourues et le nombre des véhicules utilisées, dans les conditions d'une grande nombre de commandes de livraison, l'existence de plusieurs centres de distribution et des types hétérogènes des véhicules de distribution. La routage dynamique peut être réalisé par l'utilisation d'information obtenue on line sur le trafic et la position des véhicules.

En sus, il doit tenir compte des fenêtres temporelles en qui peuvent être réaliser les livraisons et des restrictions d'accessibilité des véhicules dans les zones de livraison.

D'autre parte, il est nécessaire l'allocation des expéditions au diverses types de véhicules, de capacités différents, en rapport avec le type des marchandises et les zones de destination. Dans les conditions d'introduction de commerce électronique, des échanges électroniques de données il est possible l'allocation dynamique des commandes.

L'introduction des terminales logistiques dans le système de distribution urbaine des marchandises détermine une série d'avantages, comme les suivantes:

✓ La diminution de l'impact négatif sur l'environnement, la réduction des congestions du trafic par la minimisation des nombres de déplacements à cause de croissante des facteurs de chargement, de l'utilisation des systèmes de transport multimodales;

✓ Coûts de transport diminués par suite de planification du transport et des opérations de livraison, ainsi que d'opportunité d'obtenir des économies d'échelle par la gestion des grandes quantités des produits.

Le besoin de traçage des flux physiques a déterminé la développement des moyennes techniques d'identification automatiques (codes à barres, étiquette électronique, lecteurs), des solutions informatiques et des solutions opérationnelles en matière d'interconnexion, interfaçage des systèmes d'information des participants à chaîne de distribution.

La possibilité de suivi par GPS et les technologies de communication la position des marchandises et des véhicules de livraison en temps réel permettent de prévenir de retards, de modifier la trajectoire et d'informer les clients de l'heure d'arriver au point de destination.

D'autre part, l'introduction de commerce électronique et, en particulière, le commerce de type B2C détermine la réduction de coûts et de temps d'achats, des possibilités de diminution des stocks, l'extension de l'espace géographique des transactions, la croissance de réactivité, de flexibilité dans les relations commerciales, mais, aussi, l'augmentation des nombres de flux du trafic dans le milieu urbaine avec effets négatives sur l'environnement et l'espace routier.

4. CONCLUSIONS

La complexité de le domaine de distribution urbaine, l'impact sur les quasi-totalité des processus déroulés dans l'espace urbaine, fait nécessaire de trouver des solutions capables de répondre à une série étendait des problèmes relatives a ce procès: la réduction de coûts de distribution, les problèmes de gestion de transport routier, la diminution les congestion du trafic, les problèmes environnementales.

S'impose, en conséquence, le développement des collaborations entre le secteur public et privé pour solutionner les problèmes suivants:

➢ l'optimisation de localisation, d'aménagement et organisation des centres de distribution;

➢ une meilleure gestion du transport routier sur le plan logistique;

➢ l'amélioration de l'organisation et de la gestion des places de parking, de l'espace de stationnement;

➢ une meilleure régulation du trafic en zones urbaines par mesures relatives le stationnement, les horaires et les tailles des véhicules de livraison;

➢ développer des instruments de communication et informations pour guider la circulation routière en vue d'améliorer sa fluidité ;

➢ optimisation des chargements – déchargements aux centres de distribution et aux points de livraison.

Pour améliorer la logistique de distribution urbaine des marchandises on peut utilisé une gamme des outils comme:

✓ la gestion physique moderne des produits, de leur stockage, le suivi automatique des produits utilisant de codes de barre ou d'étiquettes électroniques;

✓ la tarification urbaine;

✓ la mise en œuvre de plates-formes logistiques urbaines, de transbordement rapide;

✓ la gestion des équipements comme les conteneurs et les palettes;

✓ la gestion automatique des véhicules, par l'introduction de GPS et GIS et les nouvelles technologies d'informations et communications;

✓ l'utilisation des solutions innovantes dans la gestion des livraisons en zones urbaines, la livraison pendant la nuit et en dehors de heures de pointe, l'optimisation des tournées de véhicules, le routage dynamique avec fenêtre temporelles.

Les nouvelles conceptions dans le domaine de distribution supposent infrastructures spécialisés, parcs adéquates de véhicules, technologies informationnelles et communications performantes, services logistiques innovantes.

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THE IMPORTANCE OF MARKETING TESTS IN MAKING UP MANAGEMENT PROGRAMMES

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Abstract: *If the target–market is heterogeneous, using more groups, smaller and compactor, in more senses can assure the success of the technique.*

The key–piece is the moderator. He/she should be a person with good communicative skills, open, spontaneous, agreeable, to develop a convertible state of mind. He/she should be a good listener, to stimulate discussion, but on the other hand authoritarian, to shorten the useless ones.

Introductions

Market acceptance tests of products, draft copies of product prototypes differ from project test in that they do not investigate needs and hidden motivations, they check real and reactions which users and consumers have in real situations and confronted with real offers.

There is a large variety of market acceptances. Among these mention should be made on Town Hall Test, brand test, store test, lab store test, town test, regional test market mini test, Blind test, group focus test.

1. Product Test By Means of Town Hall Test Method

New and relatively new products are the most often tested ones on the market. Many of the products offered on a market can be conditioned and presented in a large variety of forms, sizes, styles, colors, packing, labels, networks and types of stores.

Different types of a product produce different reactions on the market and they are differently accepted on the market. Some of the products are successful on the market, others are less successful on the market and others are not sold at all. Before manufacturing a product in

hundred/thousands millions of copies it is important that the draftsman, the producer, the importer and the distributor identify the most constructive versions with the maximum impact on the target market.

These ones will lead to the best sales and profits. Testing the products is made by taken into account the so - called Town Hall Test Method.

2. The Brand Test

The brand test can be necessary in at least two different situations. The most often encountered situation is the one testing the relative popularity of many brands the efficiency and the rating of certain advertising companies, made for brand image.

Another situation in which the brand test is necessary is the one in which a name or a label is chosen out of many. The test is not different from the product test. To test the popularity of a brand or to validate a name and an image, which are to be registered, psychological tests, are used (TAT), frustration test, incomplete clause tests, and word joining tests.

3. The Store Test

Usually the store test is used to choose the best version of a product in case this product can be launched on the market in many constructive versions. The versions differ in size, trademark, packing label, colour, and style. For example a sauce could be red – coloured or green – coloured a toy could be made of wood or of plastic, a book cover could be serious or extravagant. The different version of a product is differently received on the market: one version goes well, another one bad or even all.

It is important for the producer to come on the market on a large scale with best version of the product because by this he/she will increase his/her profits and sales.

At the time he cannot offer a long period of tests requires the use of two or more similar groups extended on a large geographic area selected at random. Every group includes at least 11 – 12 different shops or even more.

Each one of these groups sells one of the versions of the product.

The results of the test are measured directly by the way the products are sold in every group of stores.

After a few days/weeks the conclusions are drawn.

The version which brings the most sales will be manufactured and launcher on a large scale. The other version will be given reps without any regrets.

4. Itinerant Store Test

A store on wheels becomes a kind of itinerant store, a mini while market, which can change customers daily or weekly. It moves from one street to another from one area of the town to another one.

The tested product is introduced with many others in one or more versions of presentation. The itinerant store often succeeds in identifying the best placement, categories of customers' shops of good custom. Even more these itinerant stores test the existence or the non- existence of possible patterns or specific behaviour of consume or purchase.

5. Lab Store Test

The lab store is a fictitious store where buyers simulate more or less fictitious purchases. They choose real products or models, the packing or the label of a product, which they do not pay for in cash and by means of certain coupons with conventional value offered at the entrance in the shop. When the purchaser leaves the lab – store the customer leaves the product and the coupon at the cash register.

For this he/she can get an ice cream, a cup of coffee or a newspaper. Usually the value of the coupon equals the value of the product or brand tested which are exhibited among other products or brands existing in the store of necessary the value of the coupon can equal the value of a person's daily purchases.

6. The Town Test

In choosing the price levels and in testing the chart of an advertising company the best result are obtained on the basis of the town test. It works out on the same principle as the store test, the only difference is that instead of groups of stores we have groups of town. It the store test is important for a town, the town test is representative for a larger area or even for a country. A condition difficult to achieve to linked with the comparison and representatives of the towns. The difficulty comes from ethnical, religion, traditional differences, those of custom, revenue, and employment.

Besides other uncontrollable factors can occur such as weather labour conflicts, factory rentals celebrating local holidays. To these factors we can add competition, which can disturb or distort the results of the test. For example when a company launders an advertising campaign -test in a certain town, competition can bring about a change in price in the same town.

7. The Regional Test

Markets – tests with a grater proportion can be unfolded on larger, geographical areas, which can cover a country's surface. Geographical areas selected to make the tests are used as

distinct market on whose basis we can compare different marketing programs, which include completely the process of launching a product or a service.

The product is released on the market in an almost final shape to test the customer's attitude to the whole marketing process that should surround it.

The choosing criteria of geographical areas could be:

- The representativeness degree for a country or a group of countries';
- The covering degree with those mass-media networks that will be used to promote and launch the product at a real scale. T.V. and radio channels are taken into consideration, but even these can have a partial cover (for example TVR2);
- The cover degree with infrastructure and real-scale distribution networks;
- The area and market potential-test, which will be big enough to assure a reasonable representativeness, but small enough not to exceed the research budget;

To analyse a regional test, that costs pretty much, we should take into consideration the attitude of the counterparts during the test. A strong competitor can introduce errors and distortions when, during the test, reduce or increase the budgets for advertisement or price levels. Thus, it can generate confusions and mistakes in interpreting the result.

8. Mini market test

When we don't have time and money to realise a bigger tests for product for large consume and same industrial products, the mini market test are the alternative. Going from house to house or to firms, they sell different products by rotations, using catalogues, leaflet, photos and samples. The free samples can be a variant of this type of test.

9. The blind test

Most of the products on the market are already under the protection of a certain trade –mark. The image of the trade-mark, once made, is reflected by the products and represents a central element, which gathers attitudes and commentaries of consumers.

The customer takes to the brand, faithful for a long time or, on the other hand, is respected.

The conclusion would be that, when he prefers a product the customer doesn't do it just for the obvious advantages that he feel, but also for hypothetical ones, suggested or induced from the brand image or the origin of the product. More often than not, the image and the origin of the trademark become even more important that the image we perceive with our own senses.

For all these reasons, the marketing tests which require the direct interventions of taste, smell, sight, feel and hear senses in appreciating and categorising more products must be done

blindly, that is without any indication towards the trade mark and origin, otherwise the public image or the producer will distort the appreciation.

10. The Group-Focus test

It is a test conceived as an idea, project or prototype done as an exploring group discussion. It looks like a brainstorming session. A number of 8-12 customers sit around a table and discuss freely various aspects concerning attributes, conditioning and presentation.

The discussion is guided by a moderator and lasts an hour a half, maximum 3 hours.

The structure of the group can be random, but can be strictly done from beforehand. The moderator's job is to ask more or less predetermined questions to which he seeks sincere answers. As long as the discussion follows the desired track the moderator doesn't intervene, letting group ask and give questions.

As a general rule the participant are paid the time spent in a brainstorming session. Furthermore they are assured that their discussion and opinions are absolutely necessary to generate new ideas on new product. This can be stimulating even as future client.

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IL MERCATO ROMENO DELL'IT

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L'industria della tecnologia dell'informatica e' una fra le poche industrie che rendono in Romania. Appartenente al settore quaternario, l'industria dell'informatica e' capace di creare ricavi giganteschi in un breve periodo senza tante richieste d'ordine finanziario, l'eccezione facendo gli investimenti in macchine e prodotti software.

La Romania e' un mercato forte, essendo conosciuta come un paese con un gran potenziale per lo sviluppo della tecnologia dell'informatica. Questa situazione non e' da sempre cosi. Sono stati necessari più di 10 anni per raggiungere i livelli d'oggi. Durante tutti questi anni si e' agito in varie direzioni: al livello del mercato dell'hardware; a livello del mercato del software; al livello del lavato specializzato in IT; al livello di legislazione romena valida nel campo.

1. L'industria della tecnologia informatica in Romania durante gli anni del comunismo

La capacita' di ricerca e di sviluppo nel dominio dell'IT in Romania era limitata, a causa della mancanza delle macchine hardware e dei pacchetti software. Alla fine dell'anno 1989 il valore stimato dei PC istallati in Romania era equivalente ai cinque USD per abitante.

Nel 2003, il mercato dell'IT romeno ha registrato una crescita del 12% in confronto all'anno precedente. Il ritmo di crescita di questo mercato registrato in Romania nel 2003 si mantiene anche per il futuro.

1.1. Il mercato romeno dell'hardware durante gli anni del comunismo

Durante il regime di Ceausescu, gli scambi commerciali erano caratterizzati da un protezionismo vicino all'isolamento. Il Governo era reticente agli importi di tecnologia dell'informazione proveniente dai paesi occidentali. Tutto quello che entrava in Romania entrava in modo clandestino e attraverso la contrabbanda. Gli importi della tecnologia dell'informazione dai

paesi appartenenti al *"Patto della Varsavia"* era limitato. Limitate erano anche le opportunità del personale che lavorava in quest'industria di specializzarsi all'estero oppure d'avere accesso alle pubblicazioni straniere nel campo.

Questa situazione si e' dimostrata ad essere positiva e negativa nello stesso tempo, contribuendo allo sviluppo delle capacita' tecniche autoctone. La produzione romena delle macchine e' diventata non competitiva (con prezzi alti e tecnologia antica).

La parte positiva delle cose e' che la Romania e' stata capace di sviluppare la capacita' tecnologica per la produzione dell'hardware e del software proprio. Nel 1957 e' stato costruito il primo computer romeno, seguito del computer *"FILIP"* nel 1996 e *"LALL"* nel 1987.

Nell'era del comunismo, l'industria della tecnologia dell'informatica (IT) dei paesi comunisti si situava fra il quarto e sesto gradino su una scala da uno a sette. La Romania aveva una capacita' di produrre mini computer che s'indirizzava al mercato locale (*"Filip"* 1996). In Romania esistevano una serie di produttori di harware locali (*"ROMCD"*) di periferiche (in principale luogo stampanti e *"hard driver"*) per il consumo domestico. La *"ROMCD"* aveva addirittura un mercato esterno per i suoi prodotti nell'Unione Sovietica.

La maggior parte degli istituti di profilo rumeni (*"FCE Bucuresti"* e *"ROMD"*) si occupavano della produzione di prodotti propri e dell'adeguamento e della modifica dei prodotti al mercato locale romeno. Questi istituti erano capaci di produrre delle macchine industriali per il monitoraggio ed il controllo dei processi industriali. Le macchine prodotte avevano nella loro struttura dei componenti microelecttronici e software operazionale riunito in un pezzo unico che costituiva un'applicazione in se stessa. In Romania degli anni'80 l'accento è emesso sullo sviluppo dei seguenti mini computer:

➢ *"FELIX C"* – compatibile con il computer americano *"HONEYWELL BULL C11"*;

➢ *"INDEPENDENT"* basato e compatibile con il *"DEC PDD/11/"*;

➢ *"CORAL"* parente del *"DEC VAX 11/730"*;

La *"ROMCD"* era socio della compagnia americana *"TI-Control Data Corporation"* e fabbricava prodotti sotto licenza, il prodotto più venduto essendo un hard disk di 58 MB.

La tecnologia romena era più vecchia di quell'occidentale d'almeno 10 anni. Nel periodo in cui nei paesi sviluppati si registrava il *"boom"* della tecnologia dei personal computer, in Romania gli operatori che lavoravano sui PC romeni utilizzavano i processi *"batch"* con cartelle perforate e aspettavano giorni interri per finire un'installazione di un nuovo prodotto.

Verso la fine degli anni'80 si e registrato un'apertura verso l'importo delle componenti che provenivano dall'Asia del Sud. A quest'apertura si aggiunge la produzione dei primi micro

computer romeni: "*FELIX M18*" che e' stato seguito dal "*FELIX PC*" che utilizzava una piattaforma simile al MS-DOS su 128 Kb di memoria.

1.2. Il mercato romeno del software durante gli anni del comunismo

In Romania l'industria del software si concentrava in principale luogo sugli Istituti Statali per ricerca e sviluppo che sviluppavano ed implementavano il software. Il più grosso ed il più importante fra gli istituti di ricerca era "*l'Istituto per la Tecnica di Calcolo ed Informatica (ICTI)* " di Bucarest che aveva circa 3000 dipendenti.

Altri istituti presenti sul mercato dell'Informatica erano:

-   "*Istituto per la Tecnica di Calcolo (CTI)* " fondato nel 1968 che produceva le componenti hardware ed i sistemi operativi basati sui micro processori;

-   "*Istituto Centrale dell'Informatica (ICI)* " fondato nel 1970 specializzato nella produzione software destinata ai grossi clienti. Il più importante software realizzato e' stato quello per la gestione ed il funzionamento della Centrale Nucleare della Cernavoda. L'Istituto esportava prodotti software nei paesi del Patto di Varsavia e nei cosi chiamati "*paesi amici*" come L'India e Cina. Il "*CTI*" aveva 40 centri regionali situati su tutto il territorio della Romania.

I pacchetti software creati erano indirizzati verso l'esercito e la sicurezza nazionale, che godevano d'importanti finanziamenti da parte dello stato. Tutti gli altri settori d'attività avevano software anziano con un'età compresa fra 3-20 anni. Gli Istituti di ricerca proprietà dello stato e le grosse aziende statali erano i principali consumatori di prodotti IT (la maggior parte utilizzavano il software destinato alle statistiche e alla contabilità). I linguaggi più utilizzati in pratica erano: "*COBOL*", "*Assembler*", "*FORTRAN*" e "*PASCAL*".

2. La situazione attuale della Tecnologia dell'informatica in Romania

Dopo l'anno 1989, a causa dei cambiamenti registrati nella vita sociale, politica ed economica, la situazione del mercato della tecnologia dell'informazione (IT) e' migliorata notevolmente.

2.1. Il mercato del lavoro nel campo dell'IT

La componente più importante nel processo di produzione nell'IT e' la manodopera altamente qualificata. Il livello di consumo per i prodotti della tecnologia dell'informazione (IT) può crescere soltanto se esiste personale qualificato ben preparato che può generare una forte richiesta per prodotti di questo genere.

Romania e conosciuta per il suo potenziale di manodopera altamente qualificata nel campo della tecnologia dell'informazione (IT). Lo stato romeno si e' fortemente coinvolto nella

preparazione degli specialisti per l'industria *software*, *hardware* e n*etworking* capaci di competere con gli specialisti che lavorano nei paesi sviluppati.

Verso la meta degli anni '90 meno del 5% dal totale delle persone che frequentavano il liceo studiavano l'informatica in scuola, quello che rappresentava all'incirca 40.000 giovani sui 720.000. Questa situazione era generata della mancanza di risorse di tecnologia dell'informazione (IT) nelle scuole; l'informatica non essendo un corso con la frequenza obbligatoria.

Le Università hanno più risorse hardware e risorse specifiche alla tecnologia dell'informazione (IT). La responsabilità per la preparazione degli specialisti nel campo dell'informatica e' condivisa da: Istituto Politecnico; Facoltà d'Economia; Istituto di Matematica; attraverso i corsi di lunga e breve durata.

La libertà di movimento all'estero insieme alle conoscenze delle lingue straniere, hanno fatto si che gli specialisti del mondo della tecnologia dell'informazione (IT) hanno la possibilità di partecipare a vari seminari e corsi di formazione all'estero, mantenendo le loro conoscenze in linea con quelle dei loro colleghi stranieri.

Il maggior numero di connessioni all'Interent offre la possibilità al personale IT di mettersi in contatto con vari gruppi d'interesse nel campo dell'informatica e soprattutto offre la possibilità di scaricare documentazione di specialità. In più, in Romania esistono versioni in lingua romena delle riviste di grand'interesse come "*PC World*", "*Computer World*", "*Telecomunicazioni*", "*Network World*" etc. avendo un'aria di circolazione abbastanza grande e popolarità. Soltanto l'edizione della rivista "*PC World*" circola in più di 15.000 copie mensili.

Ai mezzi d'informazione sopra elencati si aggiunge la possibilità del personale IT di partecipare alle varie fiere destinate alla tecnologia dell'informazione nelle più grosse cita' del paese. Nella loro maggior parte queste fiere sono organizzate e finanziate dalle più grosse compagnie multinazionali che lavorano nel campo della tecnologia dell'informazione (IT). Lo scopo di queste fiere e quello d'informare la popolazione e gli specialisti riguardo le ultime tecnologie. L'organizzazione delle fiere nel campo IT ha come conseguenza la crescita del consumo dell'hardware e software e da la possibilità agli specialisti di migliorare le loro conoscenze nel campo.

Un contributo importante alla formazione professionale delle persone che lavorano nel mondo dell'informatica appartiene ai corsi di formazione. Le aziende private che lavorano nel campo della tecnologia dell'informazione (IT) scelgono come forma di qualifica, i corsi organizzati dagli istituti specializzati.

Di solito, la maggior parte delle grosse aziende statali offrono ai loro dipendenti la possibilità di seguire corsi di formazione che non superano di solito 2-3 giorni nell'arco dell'anno.

Meno costosa sembra ad essere l'assunzione di un a persona qualificata che può organizzare una formazione interna.

Le piccole aziende non hanno la possibilità di dare ai loro dipendenti l'opportunità di frequentare corsi di formazione. Di solito queste aziende assumono persone qualificate che organizzano la formazione all'interno dell'azienda oppure si richiede l'autoformazione.

La strategia di *"assumere persone già qualificate"* a sfavore della formazione del personale necessario, e conseguenza dell'alto livello di mobilita' delle persone sul mercato di lavoro (il *"tun-over"* delle persone e' abbastanza elevato in questo campo d'attività).

2.2. <u>Le telecomunicazioni</u>

Fino all'anno 2004, il mercato delle telecomunicazioni era monopolio di un'unica azienda *"Romtelecom"*, in cui lo stato e socio di maggioranza. Questa situazione ha fato si che il prezzo dei servizi di telefonia e d'Internet erano stabiliti dal Ministero delle Telecomunicazioni essendo assai elevato. A partire dal 2003 sul mercato delle telecomunicazioni e' entrato un nuovo operatore *"Astral Telecom"*. Nonostante tutto la *"Romtelecom"* continua fornire la maggior parte dei servizi di telecomunicazioni in tutte le cita, in regime digitale.

La prima rete di PC di natura pubblica nasceva in Romania nel 1991 e la prima connessione internazionale e' stata realizzata nel 1993. Ad oggi in Romania, esistono due reti pubbliche internazionali, ambedue essendo costruite con finanziamenti dell'Unione Europea:

> la rete nazionale dei PC per la ricerca e lo sviluppo in cui sono riuniti più di 200 Istituti di ricerca romeni. Il nodo centrale e' presso Istituto Centrale d'Informatica di Bucarest;

> la rete degli Istituti d'Insegnamento Universitario – unisce tutte le Università dalla Romania. Il nodo centrale si trova presso il Politecnico di Bucarest.

A partire dal 1993 sul mercato della tecnologia dell'informazione (IT) sono apparse tante società che lavorano in collaborazione con le aziende straniere e che offrono macchine e servizi come qui sotto: servizi di posta elettronica; comunicazione via satellite; connessioni ISDN; l'accesso alla magistrale Internet.

All'inizio dell'anno 1996 esistevano quasi 10.000 operatori Internet (*"Internet Service Providers – ISP"*) nel 1998 il numero era di 50.000, e ad oggi il loro numero e' di 75.000. Il più grosso e più importante e' *"Astral Telecom"*.

2.3. <u>Il mercato del software</u>

Le società produttrici di software come *"Microsoft", "Novell", "SCO"* e *"Oracle"* hanno creato le loro rappresentanze in Romania. Le compagnie produttrici si hardware hanno creato le loro filiali in Romania e le compagnie produttrici di software hanno utilizzato la rete locale di distribuzione apogiandosi sulle aziende specializzate nella vendita di questi prodotti.

Questa differenza fra I due settori e conseguenza della dimensione diversa dei due mercati. Il mercato romeno per le applicazioni software e' molto più piccolo e meno redditizio in confronto al mercato dell'hardware Questa situazione e' stata determinata da due fattori: livello elevato della pirateria software in Romania ed i costi ridotti del software romeno.

L'introduzione della legge del *"copyright"* nel 1996 e la costituzione dell'Ufficio Romeno di Lotta contro la Pirateria Elettronica nel 1997 (socio del *"Business Software Alliance –BSA")* hanno contribuito significativamente alla diminuzione della pirateria e alla crescita del mercato del software. La maggior parte delle aziende romene scelgono d'acquistare pacchetti software originali con licenza per il loro funzionamento, quello che li permette di guadagnare un vantaggio competitivo di fronte alla concorrenza.

Il basso costo dei prodotti software romeni fa si che i pacchetti importati sembrano molto costosi. I bassi costi dei prodotti software non s'arano possibili se gli stipendi del personale che lavorano nel mondo della tecnologia dell'informazione (IT) non sarebbero piccoli in confronto con ai colleghi dall'estero.

Le aziende romene produttrice di software fanno degli sconti importanti al prezzo di vendita sul mercato romeno per poter vincere contratti con organizzazioni statali oppure contratti molto importanti da un punto di vista valorico.

Le aziende di software hanno di solito, nella loro maggior parte, piccole dimensioni con un numero di dipendenti compreso fra 1-2, essendo di solito persone liberate dal mondo della ricerca oppure neolaureati. Esistono anche aziende di medie dimensioni con un numero di (10-50 dipendenti), pero sono meno presenti sul mercato nazionale, senza parlare delle grosse aziende che in realtà' non esistono.

Tutte queste aziende svolgono i seguenti tipi d'attività:
- produzione di software sulla richiesta, per rispondere alle richieste dei clienti domestici che utilizzano i PC e per le aziende di piccole dimensioni;
- adeguamento dei pacchetti software esistenti per farli corispondere alle richieste un un certo mercato (per esempio: la costruzione di base dati oppure completamento di fogli elettronici di calcolo, usando linguaggi di programmazione come: *"Visual Basic"*, *"C+"*, e di realizzare un interfaccia romena per i pacchetti software esistenti);
- commercializzazione pacchetti software importati;

Le richieste per i pacchetti software in lingua romena e la necessita' d'adempimento delle norme legale romene, offrono una specie di protezione naturale a favore dei produttori locali di software. Il processo di transizione verso l'economia di mercato contribuisce al mantenimento di questa protezione, conseguenza delle modifiche del quadro legislativo, le modifiche delle tasse;

tariffe. In questo modo, i sistemi informazionali devono essere modificati spessissimo per poter far fronte a tutti i cambiamenti. Le modifiche sopra elencate non possono essere realizzati che dalle aziende di software locali che conoscono molto bene le caratteristiche e le richieste del mercato locale.

La presenza delle multinazionali sul mercato romeno di software, ha contribuito all'applicazione degli standard internazionali nella produzione di software, e all'utilizzo della lingua inglese in quest'industria. La conseguenza e' che le aziende romene non sono motivate a produrre software indirizzati esclusivamente alle medie e piccole aziende bensì nell'adeguamento dei pacchetti software prodotti all'estero per farli corrispondere alle richieste dei clienti. Dopo il 1989 si e' abbandonata la produzione del software operativ, base dati e applicazioni complesse come prima si faceva. I pacchetti software prodotti localmente sono indirizzati a certe nicchie di mercato e la commercializzazione e l'adeguamento dei prodotti provenienti dall'estero, quelo che si dimostra ad essere un'attività più redditizia..

Le applicazioni destinate alla contabilità oppure ai vari sistemi di produzione beneficiano, come detto sopra, di una protezione naturale determinata dal fato che nessuna compagnia multinazionale non può conoscere e rispondere alle particolarità del dominio di riferimento. Per eliminare questo svantaggio i produttori esterni tendono a creare delle aliante con le aziende locali per poter adeguare il software alle esigenze locali.

I principali prodotti romeni destinati a varie nicchie di mercato sono: software antivirus ("*RAV", "Bit Defender"* –realizzato dalla " *Softwin*") e software per le comunicazioni. Questi prodotti possono essere utilizzati anche al di fuori dalla Romania quello che fa si che esiste il pericolo che questi prodotti vengono sostituiti d'altri prodotti stranieri come "*Mc Affe", "Norton Antivirus"*, "*Symantec*" etc .

La maggior parte delle aziende romene produttrici di software si indirizzano al mercato romeno, pero c'e' ne sono anche delle società che lavorano per l'estero. Una di queste e la "*Siveco*" (Romania) fondata nel 1992. Il 10% delle azioni e' rappresentato dal capitale romeno ed il 90% appartiene alla compagnia "*Siveco France*". Ad oggi, il 85% del fatturato della "*Siveco Romania*" circa 200.000 USD proviene dall'export.

2.4. Il mercato hardware

Le compagnie multinazionali produttrici di hardware, presente in Romania svolgono di solito un attività di consulenza nella scelta delle più adatte soluzioni tecniche per i vari clienti, la vendita delle macchine, l'installazione delle macchine, e la loro manutenzione e anche l'organizzazione dei corsi di qualifica per il personale che usa queste macchine.

Le più' grosse vendite sul mercato romeno sono state registrate per i PC marchio: *"Compaq", "IBM", "Sun", "Apple", "Dell" e per le periferiche "Epson", "Canon", "Hewlett-Packard", "Genius".* Dal 996 il mercato dei PC in Romania e' cresciuto del 26 % registrando 50.960 unita' vendute, ad un valore stimato di 78 milioni di dollari.

Al vertice si trovano un produttore locale ed un *brand name*: *"Sprint"* e *"IBM"*, ognuno ricoprendo il 8,5% del mercato. I più importanti produttori presenti sul mercato sono: *"KT Technology"* (6,7%), *"DTK"* (6,6%), *"Blue Ridge"* (6,0%), *"Hewlett-Packard"* (5,9%), *"Salient"* (5,7%), *"Flamingo"* (5,6%), *"Zenith Data Systems"* (5,0%), *"PGA"* (4,4%).

Da un punto di vista monetario, la gerarchia cambia, sulle prime cinque posizioni trovandosi: *"IBM"* con il 11,0% del mercato, seguito a grande distanza da un gruppo formato dai: *"Compaq"* con il 6,9% del mercato, *"Sprint"* con il 6,2% del mercato, *"KT Technology"* con il 6,1% del mercato e *"Hewlett-Packard"* con il 5,9% del mercato. I prodotti *"brandname"* hanno rappresentato un terzo del mercato e 51% dal valore di mercato

Lo stipendio medio in Romania e' abbastanza basso in confronto ad altri paesi dell'Europa Centrale e dell'Est e quindi la popolazione non rappresenta il *"target"* delle aziende produttrici di hardware. I principali clienti sul mercato hardware sono le grosse aziende multinazionali.

I produttori romeni di hardware hanno creato e venduto, macchine di piccole capacita' con processori meno potenti, che hanno una manutenzione difficile e un consumo elevato d'elettricità Questi dati hanno fatto si che i prodotti d'origine romena, col passare del tempo non sono più stati richiesti dal mercato. Hanno guadagnato le grosse aziende straniere che hanno coperto il mercato romeno partendo dalla popolazione, piccole aziende e grosse aziende, vendendo dei prodotti meno costosi, facili da utilizzare con delle caratteristiche tecniche superiori.

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LE STRATEGIE DI GUADAGNO DELLA FEDELTA' DEI CLIENTI TRAMITE L'INTERNET

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Il guadagno della fedeltà dei clienti (la fidelizzazione) tramite l'Internet ("e-loyalty") ha delle caratteristiche diverse della stessa attività realizzata con le strategie classiche di marketing ("off-line"). Utilizzando l'Internet, ogni azienda deve rispettare il codice etico imposto dall'Web, quello che vuol dire che, nessuna persona non ha il diritto di trasmettere dei messaggi commerciali non richiesti ("spam") senza l'accordo espresso del destinatario. Le offerte promozionali lanciate per i clienti potenziali oppure i programmi di fidelizzazione dei clienti esistenti, possono essere spedite soltanto alle persone che hanno accettato in anticipo di essere inclusi in una "data base" delle aziende che svolgono questo tipo d'attività.

Le strategie classiche di fidelizzazione dei clienti sono focalizzate sui clienti più redditizi, sfruttando il loro potenziale d'acquisto. Il guadagno della fedeltà con l'aiuto dell'Internet ha un'aria d'azione più larga; i costi di una campagna di fidelizzazione dei clienti avendo come supporto l'Internet sono molto più bassi. Le aziende concentrano le loro azioni per la fidelizzazione dei clienti su tutte le persone che hanno accettato in anticipo di mettere a disposizione i loro indirizzi mail, indipendentemente del fatto che sono oppure no clienti, oppure che sono oppure no clienti potenziali. Sull'Web site, una persona che effettua per la prima volta un primo acquisto viene inclusa in un programma di fedelizzazione e beneficia da subito di una serie di agevolazioni per gli acquisti futuri.

1. La fidelizzazione tramite l'Internet

Le aziende, tramite i siti commerciali Internet desiderano acquistare più indirizzi mail dei potenziali clienti (operazione che richiede degli sforzi strategici importanti) con l'obiettivo di creare

tramite questi *"store front elettronici"* la fidelizzazione *dei clienti* esistenti, misurata nel numero dei ritorni ai rispettivi siti Web. Quest'atteggiamento e' normale. La pratica ha dimostrato che e' più costoso (di almeno 5-10 volte) per un'azienda attirare nuovi clienti che fidelizzare quelli già esistenti.

Nelle condizioni in cui in Romania gli utilizzatori dell'Internet stano crescendo come numero, le aziende utilizzano di più gli *website* commerciali, come una modalità efficiente per lo sviluppo del business nelle condizioni in cui il target vistato accede all'Internet.

I consumatori hanno oggi più possibilità di scegliere fra le varie offerte esistenti sul mercato e anche più agevolazioni offerte dall'Internet di trovare e di accedere ad un volume immenso d'informazioni, diventando in questo modo più attenti nella decisione d'acquisto di un prodotto. I consumatori possono migrare con facilita' verso i prodotti oppure i servizi dei concorrenti, se più convenienti. In questo caso le aziende sono obbligate a dover gestire molto attentamente i rapporti con i lori clienti e di introdurre nella loro politica e strategia dei programmi complessi per guadagnare la fedeltà dei clienti.

Il processo di fidelizzazione dei clienti tramite l'Internet ha delle caratteristiche diverse dal processo di fidelizzazione dei clienti tramite le strategie classiche di marketing *"off-line"*.

Utilizzando lo strumento Internet, qualsiasi azienda deve rispettare il codice etico imposto dal Web secondo il quale nessuno non ha il diritto di spedire dei messaggi commerciali non richiesti (i *"spami*) e neanche' nessun prospetto senza l'accordo esplicito del destinatario. Le offerte promozionali lanciate con lo scopo di attirare clientela potenziale oppure di fidelizzazione dei clienti esistenti possono essere spedite soltanto alle persone che hanno accettato di essere incluse nelle basi dati delle aziende che iniziano questo tipo d'attività.

Un altro elemento di differenziazione fra l'attività di fidelizzazione dei clienti *"on-line"* (concetto che si ritrova anche con le denominazione di (*"e-loyalty"*) e l'attività di guadagnare la fedeltà dei clienti *"off-line"*, consiste nella rapidità d'integrazione nelle strategie di marketing delle aziende.

Le strategie classiche di fidelizzazione dei clienti vengono focalizzate sui clienti più redditizi esplorando il loro potenziale d'acquisto. La fidelizzazione tramite l'Internet ha un'aria d'azione più larga. I costi di una campagna di fidelizzazione tramite l'Internet, sono molto più ridotti, le aziende concentrano le loro azioni sulla fidelizzazione di tutte le persone che hanno accettato in anticipo di mettere a disposizione i loro indirizzi mail, che sono o che non sono clienti di un certo prodotto, che sono oppure che non sono clienti potenziali di un certo prodotto.

Sul sito web, una persona che fa un primo acquisto è inclusa nel programma di fidelizzazione e beneficia immediatamente dai benefici offerti a tutti i clienti.

La fidelizzazione dei clienti tramite l'Internet comincia con l'acquisto della loro fiducia, seguita da una serie di azioni destinate allo sviluppo di tutte le asse di fidelizzazione:

- *la presentazione sul sito web di informazioni che riguardano i prodotti ed i servizi offerti e anche i programmi d'assistenza nell'utilizzo di certi prodotti che riguarda la fidelizzazione relazionale;*

- *la generazione di un punto di vista favorevole dei clienti tramite le presentazioni di prodotti utilizzando delle informazioni veridiche, che possono essere verificate. Questi punti di vista favorevoli possono arrivare da parte delle personalità che sono dei modelli oppure che beneficano della simpatia della maggior parte delle persone che costituiscono il target vistato;*

- *l'inserimento sul site web di offerte speciali che hanno lo scopo di aumentare la fedeltà funzionale stabilita in seguito al primo acquisto;*

- *la presentazione sul sito web di informazioni sui vantaggi che generano la fidelizzazione promozionale (per esempio, i clienti che acquistano "on-line" beneficiano di uno sconto del 10%);*

- *lo sviluppo di un sentimento di appartenenza alla comunità, in cui tutti i membri condividono gli stessi valori e che parlano "on-line" dei marchi preferiti (in questo senso, un'azienda può creare un gruppo di discussioni "on-line" con lo scopo di attirare dei clienti nella formazione di una comunità' virtuale);*

- *l'inserimento su un site di banners pubblicitari "on-line" in cui vengono presentati ai clienti nuovi prodotti oppure servizi, e che possono essere travati dai clienti fedeli ad un prezzo promozionale oppure gratuito.*

L'interesse delle aziende per una strategia di fidelizzazione dei clienti tramite l'Internet e' determinata dall'elevato potenziale di redditività. I risultati di una ricerca mostrano che una crescita del 5% dell'indice della ritenzione die clienti in seguito alle azioni di *web-marketing* genera in certi settori d'attività aumenti dell'utile fino al 75% (*Reicheld, „The Loyalty Effect"*).

In seguito all'attività svolta di visualizzazione e d'analisi di tanti Web siti commerciale appartenenti alle aziende romene, ho costatato che in Romania, la maggior parte delle aziende concentrano la maggior parte delle loro risorse di Web marketing verso la prospezione e la fidelizzazione dei loro clienti. L'aumento del traffico sui Web siti sembra essere in questo momento la principale preoccupazione delle azioni di Web marketing intraprese dalle aziende romene.

La strategia di fidelizzazione con l'aiuto dell'Internet ha come obbiettivi: la stimolazione e lo sviluppo della base dati clienti che permettono la rilevazione del loro comportamento; l'anticipazione dei loro fabbisogni ed il ritrovo delle nuove di aggiungere valore alla relazione coi clienti tramite i programmi CRM.

2. **Tipi di strategia di fidelizzazione dei clienti on-line**

L'Internet rappresenta un mezzo ricco da punto di vista delle possibilità di comunicazione. Il momento della diffusione di una campagna promozionale oppure di fidelizzazione *"on-line"* può essere pianificato molto precisamente. I messaggi trasmessi possono essere personalizzati, possono includere suoni, immagini, animazioni e possono generare numerose azioni commensurabile (frequenza delle visite di un certo sito, il numero delle raccomandazioni dello sito fatte ad un gruppo di amici oppure colleghi; le transazioni realizzate, i legami URL verso vari siti che sono state visitate e cosi via).

Le principali strategie di fidelizzazione dei clienti con l'aiuto dell'Internet:

- *le strategie puntuali di tipo, one-shot* legate da un evento specifico, pianificato in anticipo che necessita' un coordinamento dei contatti con i clienti tramite i canali multipli: telefono, fax, pagina Web, VoIP, e cosi via. Esse generano come regola rate di ritenzione elevate pero sono estremamente costose e sono difficile da gestire;

- *le strategie di fidelizzazione "on-line" tramite l'analisi del comportamento dei clienti* si basano su connessioni di messaggio basati sullo stesso tema. Per esempio, nel processo di iscrizione su un sito Web, un nuovo abbonato può ricevere una serie di offerte speciali in una settimana. Il comportamento dell'abbonato sul sito può essere attentamente seguito (il momento dell'apertura del sito; i numeri di clic sulle offerte spedite e gli acquisti effettuati) per essere incluso in su a categoria di clienti;

- *le strategie di fidelizzazione on-line tramite l'analisi delle preferenze dei clienti* sono abbastanza frequentemente utilizzate e hanno alla base le informazioni sulle preferenze dei clienti depositate in base dati clienti. Le aziende possono spedire mail di questo tipo in cui possono presentate le offerte personalizzate, che nella loro maggior parte hanno un grado elevato di successo;

- *le strategie di fidelizzazione on-line basate sulla conoscenza dei dati personali dei cleinti* si materializzano nella spedizione di cartoline via e-mail oppure regali nell'occasione dei compleanni dei clienti. A parte il fatto che offre dei servizi con valore aggiunto emozionale elevato, questi eventi rappresentano delle opportunità per fare proposte di nuovi prodotti e di realizzare vendite incrociate;

- *le strategie di fidelizzazione "on-line" sulla base della trasmissione di lettere con le novità ai clienti fedeli* sono utilizzate quando si desidera la crescita delle vendite addizionale, e quando le aziende, possono permettersi di allocare parte importante del budget di marketing nello scopo di creare di offerte attraenti;

- *le strategie di attirare e di fidelizzre on-line i clienti utilizzando la tecnica del marketing virale*- si basa sul ruolo degli utilizzatori di siti di determinare la diffusione in un ritmo esponenziale dei messaggi di marketing ad altri utilizzatori di Web. In questo modo, le informazioni positive oppure negative riguardo un prodotto oppure un servizio oppure un'azienda si possono diffondere ad un numero molto grande di persone in un intervallo breve di tempo.

Le aziende non devono applicare soltanto una di queste strategie, bensì' tutte le strategie elencate nei vari momenti della loro vita. I vari tipi di strategie di fidelizzazione dei clienti tramite, l'*Internet*, la frequenza del loro utilizzo, gli obiettivi vistati sono pianificati in funzione di ogni target dei clienti inclusi nella base dati.

L'efficacia' dei programmi di fidelizzazione tramite l'e-mail deve essere testata periodicamente. La comunicazione tramite l'Internet ha come caratteristica base che il cliente dei servizi on-line possono rinunciare in qualsiasi momento a questi servizi, rinunciando all'abbonamento ai rispettivi siti. Per evitare questi tipi di eventi non piacevoli, le aziende devono lanciare in modo permanente dei questionari *"on-line"* con lo scopo di osservare il grado di soddisfazione dei clienti.

Le campagne promozionali, gli inviti, le lettere con le novità del campo, le conferme d'acquisto servono a degli obbiettivi diversi da quelli seguiti in una campagna di fidelizzazione tramite l'Internet. Dobbiamo tener presente che il cliente si trova quasi sempre in uno stato di ante acquisto oppure post acquisto *"on-line"*, quindi la preoccupazione delle aziende di capire i suoi fabbisogni e di offrirli assistenza nell'utilizzo dei prodotti oppure servizi acquistati oppure di trovare soluzioni e di convincerli di passare all'atto d'acquisto.

Le regolo d'oro e gli errori che devono essere evitati, in una strategia di fidelizzazione tramite l'Internet, possono essere sintetizzate nella figura n. 1

Regole d'oro per la fidelizzazione dei clienti on-line	Errori che devono essere evitati nella strategia di fidelizzazione on-line
1. Pensate nello stesso modo in cui pensa il cliente; date al cliente l'importanza dovuta e offriteli i servizi che desidera! 2. Dovete essere creativi! Provate e sviluppate sempre nuove azioni sulla nicchia di mercato scelta; 3. Come manager, create una squadra dedicata alla gestione delle base dati clienti e alle azioni di Web marketing; 4. Pianificate le operazioni e seguite gli indici che fanno riferimento al valore dei clienti.	1. Concentrazione dell'attenzione sul prezzo a sfavore dei servizi*;* 2. Creazione dei progetti di fidelizzazione non troppo complessi, non troppo ambiziosi che sono difficilmente realizzabili; 3. La mancanza di una strategia coerente; 4. Calcolo non coretto dei costi e dei benefici di fidelizzazione; 5. La mancanza di non ottenimento dei risultati ottenuti nella fidelizzazione *"on-line"* dei clienti;

Figura n. 1 – Le strategie di fidelizzzione dei clienti tramite l'Internet

3. I fattori che contribuiscono alla fidelizzazione dei clienti

I dieci più importanti fattori che determinano la fidelizzazione dei clienti "*on-line*", verso i siti commerciali, esemplificandoli con degli esempi reali di siti di aziende romene che operano nei vari campi d'attività sono:.

1. Il contenuto del sito deve fornire informazioni rilevanti sui prodotti oppure sui servizi offerti, deve essere in continuo attualizzato per poter offrire ai clienti motivi di ritornate in una navigazione ulteriore. In questo modo, il sito della *Banca Romena per lo Sviluppo - Grup Société Géneurale:* www.brd.ro offre a qualsiasi cliente fedele di questa banca ed a qualsiasi persona interessata, informazioni sulle operazioni di finanziamento, consulenza finanziaria e bancaria, informazioni sui vari tipi di crediti, corsi di cambio del giorno, le offerte di reclutamento della banca. Questi dati sono analizzati giornalmente dal webmaster del sito;

2. L'inseriment sul site di offerte speciali di prezzo per i clienti "on-line" rappresenta una modalità efficiente di attirare e fidelizzare i clienti "*on-line*", pero e' molto raramente utilizzata dalle aziende romene. Come esempio il sito della Compagnia aerea *Tarom:* www.tarom.ro offre uno sconto del 15% a tutti coloro che fanno delle prenotazioni via Internet, per qualsiasi viaggio in aereo che ha come punto di partenza la Romania;

3. Service "on-line" destinato ai clienti nel periodo di post acquisto genera un livello elevato di fedeltà. Sul sito www.artelecom.ro/support.html il servizio clienti *HELP4U di Artelecom* e' pronto ad offrire assistenza non stop a tutti i suoi clienti. Il servizio e' disponibile al numero di telefono verde 08008 oppure al indirizzo help4u@artelecom.ro;

4. La creazioni di comunita' virtuali "on-line" facilita' le interazioni fra i clienti di un certo marchio e sviluppa rapporti "on-line" fra un'azienda ed i suoi clienti, tramite la creazione di un conto gratuito di utilizzatore dello sito www.coca-cola.ro offre a tutte le persone interessate di parlare "*on-line*" riguardo ai prodotti marchio „*Coca-Cola"*, avendo anche la possibilità di diventare membro di una Comunita' Virtuale „*Coca-Cola"* Românìa. I suoi membri possono discutere *"on-line"* tramite *chat* riguardo ai prodotti con il marchio favorito e di partecipare ai vari giochi e concorsi;

5. L'esistenza di iniziative sullo sito– tutte le aziende devono trattare i suoi clienti "*on-line*" con varie iniziative, sorprese piacevoli e varie promozioni per dimostrare che i loro clienti contano per loro. Sul sito del Gruppo Carrefour Românìa: www.carrefour.ro si auto inserisce una finestra che rappresenta un'offerta promozionale del tipo: „*Fino al 25 dicembre i clienti Carrefour vincono un milione di lei ad ogni mezz'ora.";*

6. Semplicità e' una condizione essenziale per far si che un pagina web sia piacevole per i suoi visitatori. I visitatori non devono confondere un sito con quello della concorrenza. Questa si

può realizzare tramite un design più possibilmente semplice. Sul sito www.pizzahut.ro un piato con una fetta di pizza presenta sui bordi del piato i bottoni di attivazione dei sotto menu: storia; promozioni; piati serviti; una rubrica Kids Fun; indirizzi; carriere; e contatto. La navigazione sul sito e' veramente facile, quello che può determinare ulteriori ritorni;

7. *Securita'* e' una preoccupazione maggiore di coloro che fanno acquisti "*on-line*". Un sito deve manifestare piu' attenzione per questa preoccupazione dei clienti. Sul sito dell'azienda Diverta: www.dol.ro quelli interessati degli acquisti *on-line"* di libri; CD, casette, filmi, giochi, IT ed elettronici, devono creare un conto che ha l'accesso sicuro e poi possono trovare le informazioni sugli acquisti. Nel momento del log, compare il messaggio: „*Per poter entrare nel tuo c/c su questo sito, e necessario che il tuo browse accetti cookies*", per garantire la sicurezza delle tue acquisizioni sul sito;

8. *Interattivita'* – le opinioni dei visitatori di un sito sono molto importanti per poter trasformare i clienti in clienti fedeli. Entrando sul portale www.orange.ro, i clienti del gruppo di telefonie mobile Orange Romania possono accedere al loro conto di mail "*on line*" Orange, possono configurare in ogni momento il servizio Mobile e-mail, possono cambiare la parola del conto d'Internet Dial-up oppure possono sapere quanti punti hanno acquisito nel programma di fidelizzazione "*Thank You"*;

9. *Personalizzazione* vuol dare la possibilità ai clienti di poter crearsi on-line l'ambiente a cui sogna. Il portale www.myx.net promosso da Connex, un modello per la Romania per l'applicazione dei principi del management dei rapporti con in clienti, presenta ai clienti vantaggi offerti dalla connessione e-mail gratuita, numero non limitato di SMS tramite il servizio WEB2SMS (3 messaggi/giorno sono gratuiti, il resto sono tassati ad un prezzo promozionale per gli abbonati Connex oppure quelli che hanno cartelle Connex Go oppure Kamarad), possibilità di ricevere sul cellulare varie informazioni, scaricare dei giochi;

10. *Segmentazione del portafoglio clienţi* – un'azienda deve nella sua base dati clienti informazioni sulle caratteristiche dei clienti, i criteri secondo i quali si realizza la segmentazione. Il sito www.microsoft.com/Romania della Microsoft vuole raccogliere delle informazioni sui clienti potenziali che li può utilizzare ulteriormente nella segmentazione della base dati clienti, ogni segmento ricevendo delle offre specifiche (pacchetti Professional, Educational, etc).

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THE NECESSITY OF MANAGEMENT CONSULTANCY

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Abstract: *The job of management consultant has appeared on the jobs market due to the tendencies of management professionalism. Its aim is to offer support and solutions to managers in order to solve fundamental problems of management, to implement scientific accomplishments or to generalize their expertise.*

Management consulting also represents a means of external support and assistance for overcoming difficulties which may appear in the managerial activities without taking direct responsibility in the decisional act or in its application.

The main objective of management consulting is to make the managerial activity more competitive and efficient.

After the political moment in 1989, Romania had to begin a transition process from a planned economy and strictly centralized to the market economy. This had determined a transformation in all aspects of life (political, economical, organizing, juridical, social and psychological). But, especially, has produced at view regarding its guidance and administration, giving up the old methods, techniques and guiding instruments which should allow the efficient fulfillment of the objectives proposed, adapting to market economy on the competitional market and surviving in time of the organization.

For the time being, joining the European Union represents the strategic priority of Romania's politics within the context of globalization, whose succes depends on the concentrated efforts of the governmental institutions, civil society and business environment and every Romanian citizen. At the same time, several objectives factors are part of EU, the main commercial partner of Romania, respectively: the geographical approach, complementarity and economical potential, as

well as the evolution in time of the juridical background.for this it is necessary to have strong transparent markets, big investments, assimilated by new technologies and productivity increase of all production factors, a developed infrastructure etc.

Romania's desire to join the European Union is the natural expression of the ideal's identity, values and principles, its vocation as a democrat country, profoundly anchored in its traditions, culture and civilization, within the European unique space.

Romania's actual economical development period – characterized trough harsh competition, displayed at both internal and international level – results into special problems for the firm's managers, which need to appeal to management consultants. The appearance of the profession of management consultant ("conseiller de direction") is due to the improvement tendencies of the managerial activity and its aim is to give support to managers for solving some essential problems and implementing the scientific accomplishment or generalizing the advanced experiences. This activity was developed a lot after the Second World War.

The managerial consultancy is a specialized activity, done by qualified personnel, that operates with the aim to analyze and identify the managerial problems of the firm, for formulating the appropriate solutions to solve them. It is a support and external assistance form for the difficulties that may appear within the manager's activity, but which does not have direct responsibility upon the operational decision and its use. In other words, the responsibility of adopting decision and its enforcement falls exclusively to the manager.

For the present time, in the business world, the managerial consultants offer solutions related to a great variety of problems (from re-engineering till electronic commerce, from managerial changes to system integration) both for corporations and for smaller companies. They analyze from various angles a problem appeared within the company's activity, release a preliminary theory regarding the cause, then find a solution meant to lead to the solution of the problem.

The managerial consultants always have as objective transforming the activity of the one who appealed to these services into a competitive and efficient one.

That is why the people practicing this profession, must have a high level of managerial training, rich experience in this field, to be fully familiar to the functioning problems of the commercial society and its sub units, to have a good capacity for analysis and synthesis, to have imagination in the economical field and deep thinking but also ability to find a solution for the practical problems.

From those previously presented, we can detach several components regarding the managerial consultancy notion:

3. *The essential objective of consultancy is to find the directions and the sensitive points within the managerial activity and to practically make some changes;*

4. *Even though they appeal to managerial consultancy, the manager is the one responsible for adopting, implementing and control over executing the decisions;*

5. *The managerial consultant accomplishes his mission independently, not as an employee of the company;*

6. *The efficiency of the managerial consultancy activity implies the understanding of the roles of consultant and its client, the clear definition of the aim and action ways, choosing the most appropriate consultant, the correct collaboration among parts and implementing the solutions proposed and assumed by the beneficiary.*

The most significant advantages of using the consultants are: company's orientation and dynamism by participating to defining the objectives and its general politics, the introduction of some new elements in the methods and work style of the managers, saving managers' time, improving the managerial activity due to specialty knowledge as well as preparing the necessary documentation to adopt the decisions.

The managerial consultancy process can last from one hour to several months and implies several stages to determine the objectives of the society and its components, it is insured the functioning of the system implied in accomplishing the objectives and its status parameters are controlled when passing from one state to another.

The development stages of the managerial consultancy process are:

1. *Preparing for consultancy;*
2. *Diagnosis;*
3. *Elaborating the proposals;*
4. *Implementing the proposals.*

Choosing and hiring the managerial consultant represnts the initial moments of consultancy process and has major importance because, upon choosing the most appropriate consultant depends the results of the managerial consultancy action. That is why, it is necessary for the manager to pick up information as complete as possible about: the specialization field of the consultant, the units he has previously collaborated, the way the proposals were done, the nature of the consultancy report, the profit obtained as results of the consultancy, the consultant's reputation, whether he has been requested by those that had previously appealed to its services, the consultant's capacity to insure confidentiality within the consultancy activity and the cost of this activity.

The field of managerial consultancy is currently populated by big and small companies, from "Big Five" that unifies the multinational companies KPMG, Prince Waterhouse-Coopers, Andersen, Deloitte & Touche and Ernst &Young, with a great number of consultants (for example, Andersen Consulting has 25 000 consultants in the United States of America), at Boston Consulting Group (which has 500 consultants in U.S.A.).

When the managerial consultant is chosen and hired it has to be taken into account that fact that both the company and the consultant are unique in their own way and this might influence the consultancy process and the consultancy technology.

This way, the current state of the company and its future depend on many factors such as: the concrete way in which the technical part was developed, the human factor, the guiding personnel and relations with the environment. At the same time, the managerial consultant is unique, due to his personal character features, professional experience, qualifications and personal methods to give consultancy.

Taking into account these unique features of the company and the managerial consultant, it is necessary to respect the general logic of the consultancy process and to take into account the factors of the situation.

Preparing for consultancy takes place at the first meeting between the manager and the consultant, when there are mentioned, by mutual agreement between the two of them, the objectives, the inclusion area, the nature of the project. The managerial consultant will try to know not only the essential of the problem, but also the details, aspects regarding the organizing structure of the company and the managerial process, as well as the potential of the company for implementing his recommendations.

At the first meeting between the manager and the consultant, the following are established as concrete elements: the period for the preliminary diagnosis, the nature of the information that are to be at at the disposal of the consultant before and during the diagnosis, the way and order in which the results of the diagnosis are to be presented, the administrative and financial problems that are to be solved.

The *diagnosis* of the commercial society actually represents the identification of the problem of the company and finding out the causes that have produced the problem.

Representative for this diagnosis process is the analysis of the managerial difficulties that need to be solved, by gradual browsing of the following stages: investigation of the situations and the analysis of the manager's and company's past activity, distinguishing the positive and negative parts of the company's activities, establishing the possible improvement directions and determining the possible help offered by the management consultant.

After this preliminary diagnosis process, the next phase of the diagnosis process consists of delimitating the major problems that influence the entire activity of the company.

Elaborating the proposals is done by the consultant, in basis of the conclusions detached from the diagnosis.

In order to elaborate the proposals, the managerial consultant passes trough the following steps:

1. choosing the work methods (comparison, interview, the matrix analysis, the factorial analysis, researching the managerial product etc.);

2. work organization, in case of a consultancy team;

3. knowing the managerial instruments and the concrete conditions to use them;

4. picking up the data and delimitating the problems (that can be of three types: problems regarding the correction of the situation for reaching some previously accomplished indicators, problems regarding the progress for improving the currents situation and the creation problems, that appear when fulfilling a new objective – for eg. a new product or service);

5. delimitating the causes that lead to the appearance of the problems and their operational formulation;

6. knowing and emphasizing some similar problems;

7. stating the proposals, their implementation control and the efficiency to introduce them in the activity of the entire company;

8. presenting the manager's proposals and his adopting of the implementation decision.

The *implementation of the proposal* is extremely important for the manager and represents the last stage of the managerial consultancy.

During this stage, the consultant offers to the manager recommendations to ease the solutions introduction, brings corrections and trains the personnel that is to implement these proposals. During the entire implementation of the solutions suggested, the consultant periodically analyzes the situation of the implementation, explains the potential situations and delimitates the necessary measures in order to correct the eventual negative consequences.

During the development of the managerial consultancy process, certain relations appear between the consultant and the manager, which need to be based first of all on honesty from both sides. Also, it is very important for the manager to be fully convinced that it is necessary to appeal to managerial consultancy services and that, the one requested for the job has the necessary ability to solve the company's problems. A very important role in establishing good relations between client and consultant goes to the one designed by the manager to keep in touch with the consultant. But these relations are

influenced also by the way the project is being followed, by the personnel chosen to collaborate with the consultant, by the information regarding the progress of the project etc.

Managerial consultancy is a process whose total efficiency is given by the partial efficiency obtained in each of the developing stages. The results of the managerial consultancy are expresed in concrete numbers, with the help of the qualitative and quantitative indicators, named efficiency indicators of the consultancy.

The main factor to determine the consultancy efficiency are: the correct formulation of the problem that is to become subject of the consultancy, choosing the most appropriate consultant, the concrete and correct collaboration between manager and consultant, the way in which the manager's tasks are fulfilled and those of this collaborators regarding the appreciation of the project and taking the necessary measures to implement it.

In conclusion, it can be stated that the appearance of the managerial consultancy is, in fact, a consequence of the improvement process of the managerial activity, during the actual stage of the development of the Romanian economy, appealing to the services of the managements consultants represents a necessity.

The character and content of the managerial consultancy is based upon the following principles:

- Consultancy independence and the given support
- The solutions offered by the consultant are not mandatory for the manager
- Interdisciplinary treatment of the problems
- Professional competence for the given support
- Contribution to increasing professionalability of the company's personnel
- Respecting the ethical norms for consultancy, especially in what confidentially is concerned

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CONTRIBUTIONS OF MARKETING AND MANAGEMENT APPROACH ON COMMUNICATION WITH APPLICATIONS IN THE FIELD OF IMAGE AND PUBLIC RELATIONS

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Abstract: *The paper deals with a concept of communication market, communication media, demand and tender of communication. It is used the analogical method, so that it is proposed the amphitheatre model, communication mix and communication relations. The proposal of a graphic representation can be useful for the people working in the field of communication, image and public relations and especially of those specialists that have a socio-human background.*

4. INTRODUCTION

Starting with classical approach on marketing about market, demand, tender and competition, it will be proved that the managerial way of thinking used in economics can be successfully used in communication, image and public relations; in our opinion, taking into consideration the practical experience and working style within Romanian communication and public relations agencies, it is necessary to underline some common mistakes, such as:

- communication strategies and public relations events are designed, nearly well enough, starting from communication objectives - the main problem is that these objectives are not related with marketing field, so that the messages are thought by specialists with a socio-human background;

- the design process is the main attribute of an art director whom background is film and theatre field, so that in many cases there is no oriented marketing view;

- the final spot can be delightful from the artistic point of view, but on the contrary, can be a disaster from marketing point of view - the spot does not invite or motivate in a specific way to go for buying;

- the slogan does not touch the targeted segments;

- the impact of the main message from the spot on the receiver is not maximized etc.

Other types of mistakes can influence the result above the audience and, especially, on consumer segments.

5. CAUSES AND EFFECTS

The paper *"Strategies and managerial communication techniques"* of M.A.NIȚĂ and R. OLĂNESCU [1] already spoke about contradictions between message, channels of communications, types of communications and strategies about managerial communication. Just to remaind, figures 1 and 2 must be used by the specialists in communications, so that a lot of contradictions have been developed in the paper above and, as a matter of fact, must be avoided by designers.
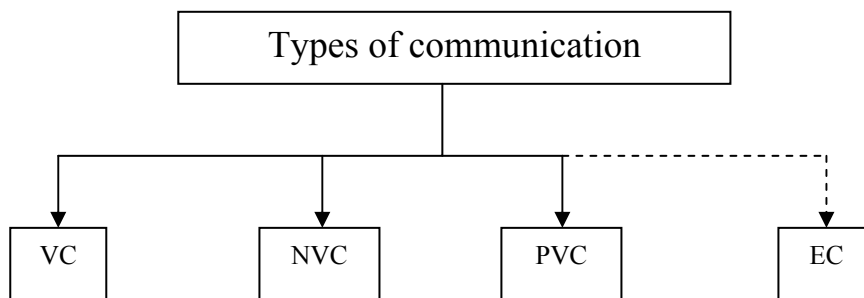
Fig. 1 – Types of communication

VC – verbal communication; PVC – paraverbal communication;

NVC – nonverbal communication; EC – energetically communication

The main causes that will be analysed bellow from the marketing management approach in communication, image and public relations are listed, as following:

2.1. contradictions;

2.2. dichotomies.

New contradictions will be underlined, as it is following bellow, but must be pointed that these will complete the contradictions from the paper above[1], such as:

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[1] M.A. NIȚĂ, R. OLĂNESCU – *Strategii şi tehnici de comunicare managerială* (in English, Strategies and techniques of managerial communication), Editura SNSPA (NSPSA Publishing House), Bucureşti (Bucharest), 2003, ISBN 973-8376-28-9;

- the main message or slogan of a TV or radio spot, or from a newspaper or magazine does not touch the targeted segments due to *a contradiction between the eye image, message itself and consumer NADA* – is a Romanian keyword that means by abbreviation BAIT for the fish. On short, **N** is coming from **N**eeds (**N**evoi in Romanian language), first **A** is coming from expectations (**A**şteptări in Romanian), **D** means **D**esires (**D**orinţe in Romanian), **A** is coming from **A**spirations (**A**spiraţii in Romanian). Contradictions can be series of mixed combinations, such as contradictions between 1-seen image and message, 2-seen image and consumer NADA, 3-message and consumer NADA, 4-seen image, message and consumer NADA, as a whole subunit;
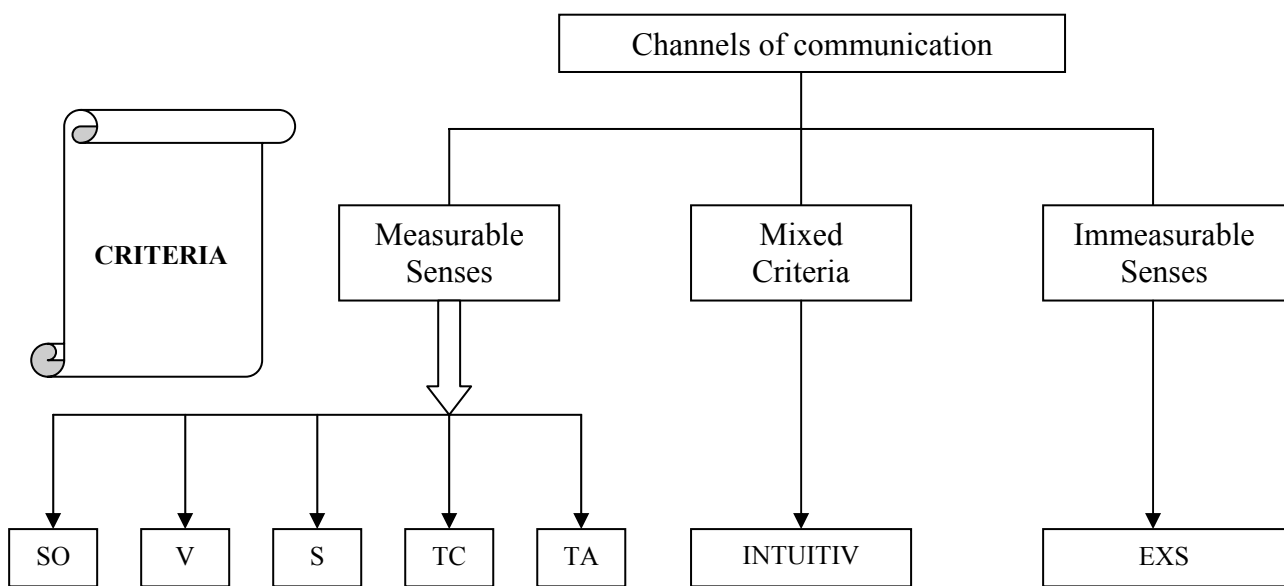
Fig. 2 – Channels of communication

SO-sound channel; V – visual channel; S – smelling channel

TC – touching channel; TA – tasting channel; EXS – extra sensorial channel

- other types of *contradictions* can be not only from the seen image, but from *heard sounds, message and consumer NADA*, of course we are talking only about TV or radio. There are 3 new possible combinations in comparison with above, such as: 1 - sounds and message, 2-sounds and consumer NADA, 3 - sounds, message and consumer NADA;
- other types of *combinations* can be taken into consideration, as a whole unit between, *eye image, sound, message and consumer NADA*, such as: 1 - eye image, sound and message, 2 - eye image, sound and consumer NADA, 3 – eye image, sound and consumer NADA.

Techniques for catching the attention

       If we are talking about techniques for catching the attention, we are ready to say that contradictions can be useful, due to the fact that these ones, as a cause, can produce the effect- to catch the attention.

       We shall point on the following types of techniques which can be structured in five categories, based on: *1 – sounds, 2 – colours, 3 – motion, 4 – proximity, 5 – narrative structures.*

       So, we notice:

1.1. sounds or disappearance of the sounds;

1.2. dynamic of the sounds, such as, growing or diminution of the sound intensity;

1.3. sound mixing and/or intensity mixing above, on short, special sound effects;

2.1. black and white versus coloured images;

2.2. dynamic of the colours, for exemple, changing either the type of colours, either the intensity, the brightness or any kind of mixing above;

3.1. motion of an object, such as a part of a human or animal body, an eye movement etc;

3.2. dynamic of a motion, such as a trajectory described either high speed, either with a lower one;

3.3. mixing of dynamic motion with repose;

4. modifying of conditions from the receiver proximity, such as noise, mechanical vibrations, new smelling aromas or unpleasant ones etc.- think about a noise that is coming from our neighbour from the floor above;

5. techniques of designing a narrative structure of a radio or TV spot, such as:

             a - the protagonist knows that the receiver knows the action or whole story;

             b - the protagonist knows that the receiver does not know what it will follow;

             c - the protagonist does not know that the receiver knows the following action;

             d - the protagonist does not know that the receiver does not know what it will follow.

       All cases were showed in the matrix bellow:

		RECEIVER	
		Knows	Does not
PROTAGONIST	Knows	HOPE	MISTER
	Does not	EXPECTATION	FOLLOWER

Fig. 3 – The matrix of possible expectations

By the help of this management matrix, from the beginning of a movie till the end, the screen player or sceneries designer will catch the attention of the receiver, either a TV watcher or a radio listener. You can analyze yourself the way you are manipulated by a movie, that in reality is only a fiction.

This is the way of designing a script, that later on is mixed with retinal images and sound effects, based on dynamic of motion.

On short, contradictions listed above can influence either positive, either negative.

Advantages of contradictions are:

- on short term, catching the attention by playing with the help of our sensitive analysers;
- sticking easier the sent message to the receiver.

Disadvantages of contradictions are listed bellow:

- effect of internal tension on the receiver which is not allowed to be maintained above a long period or a maximum level of intensity;
- effect of physical and physiological tiredness.

6. **GRAFICAL REPREZENTATION OF A MARKET – AMPHITEATER MODEL**

For soon, Romania knows new faculties and specializations, such as, the new market trend of communication and public relations specialists who are coming after the already saturated trend of marketing and management ones – see the great demand after 1989 together with the increased number of universities in the field of education. J. Lendrevie and others, in the paper Mercator – Mercator-Theorie et practique du marketing[1], proposed a schema for the marketing application – this graphic representation can be improved today, due to the changing of Romanian market.

The main gates from a football ground are targeted by main actors, such as:

1 – producers **PD**, manufactures **M** or importers **I**; 2 - en detail magazines **M**; 3 - consumers **C** and exporters **E** on other markets; 4 - intermediates **I** that can be **t**angible **T** or **i**ntangible ones **IT**, and are structured in **i**ntermediates **n**etworking **IN,** such as: 4.1 - distributors (tangible) **D**; 4.2 - persons of prescribing opinions (intangible) – we shall call them prescribing people **PP**.

Figure 4 shows a football ground full with all these categories of actors.

It is well known that the producers **PD** establish the tender's volume, the final consumers **C** determine the volume of the potential's consume, that means the volume of demand. It is necessary

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[1] J. Lendrevie, D. Lindon, R. Laufer – *Mercator-Theorie et practique du marketing*, DALLOZ Gestion Marketing, 1979, (France);

to focus on *effective demand which is established in a dynamic way taking into consideration NADA, power of purchasing and final option of the client.*

The prescribing people never transport products on a distribution chain, but they influence the way of thinking and the behaviours, both of the final consumers, distributors and producers, too. They are recognized as specialists, professionals either because of their background, either because of their success in the field and, unfortunately, either because of their notoriety (famous name); this does not mean that a famous name, as a well known name, means a very good specialist too.
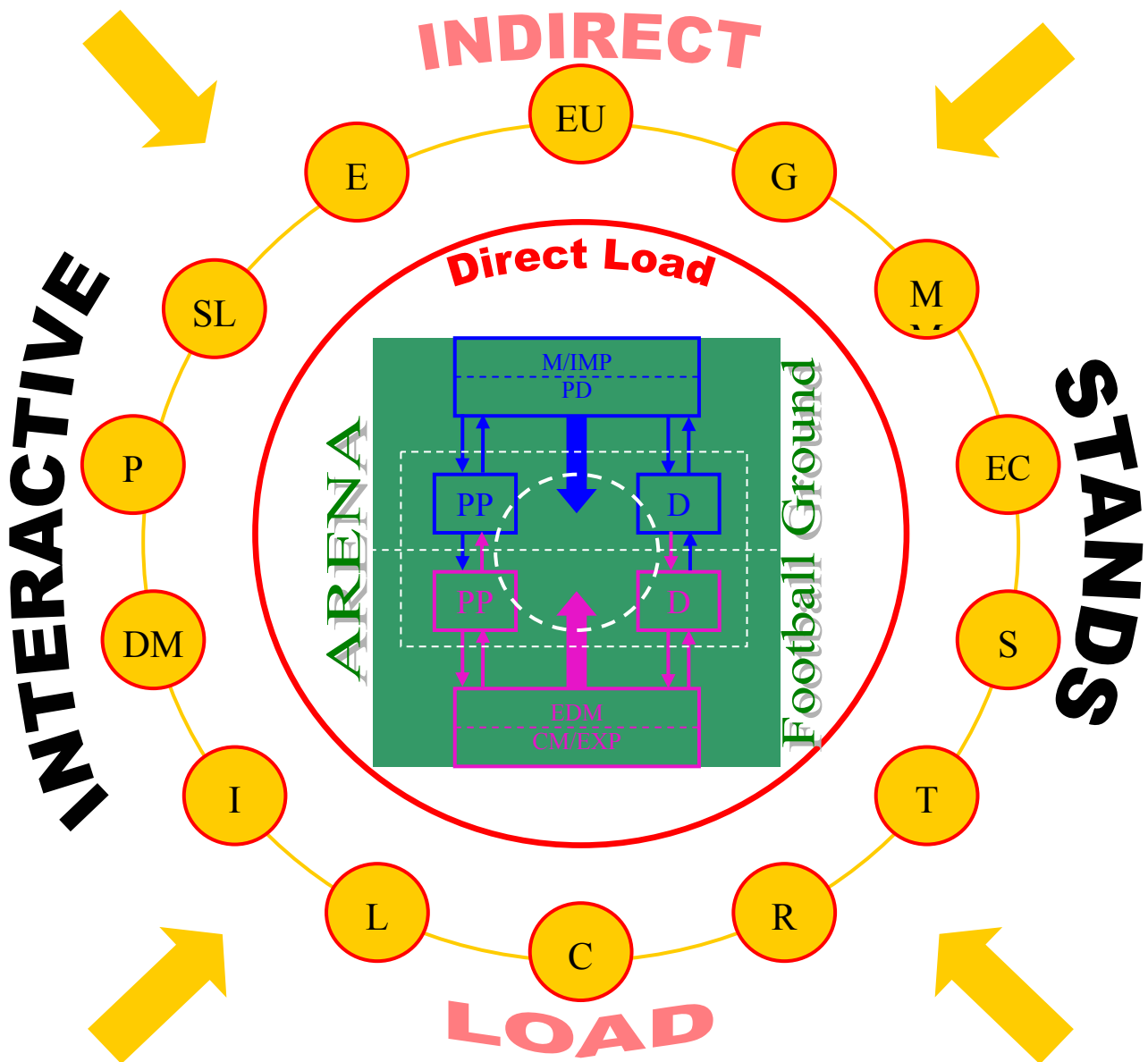
Fig. 4 – Graphical representation of a market – marketing approach

PD-producers; M-manufactures; IMP-importers; EDM-en detail magazines;

C-consumers; EXP-exporters; IN-intermediates network; D-distributors; PP-prescribing people;

TV-tender volume; DV-demand volume; E-economical medium; SL-social medium;

P-political medium; DM-demografical medium; I-institutional medium; L-legislation medium;

C-cultural medium; R-religious medium; T-technological medium; S-scientific medium; EC-ecological medium;

MM-mass media; EU-European Union medium; G-globalization medium; ED-educational medium

We are speaking about doctors, pharmacists, consultants, counsellors, designing engineers, universitary teachers and professor of al degrees etc. All of them can influence the way of thinking from a patient, client, student or pupil – it is enough to point that a type of soft, computer, grit stone or faience is better then another one. So, the social mechanism starts to function and people accept easier to be influenced by the other s opinion, I mean leaders' opinion or notoriety's opinions.

On the other hand, according to the collective attitude and behaviour, an individual can be easy influenced by the behaviour of a group, due to the fact that the association need must be satisfied – see Abraham Maslow model – other way the non-inclusion feeling and frustration sensation can appear.

Only strong characters can ration, that not all the time and in all situations, the majority within a group catch the right attitude. We can talk about *consensual true* or *contextual true*, but this is a topic that will be developed for soon in connection with manipulation of individuals by democratically model and or by mass media.

That is why, the way of decision for the client and consumer must be in depth analyzed.

If it is taken into consideration all kind of external factors that can influence the game in the market, a new figure is shown bellow.

Advantages of amphitheatre view

This graphical representation in figure 4 offers:

- a global view, that in strategically way of thinking is called *helicopter view*;

- all the actors are seen in the market;

- all types of relations are pointed, even the arrows between **PP** and **D**, **PP** and all types of medium (economical, social, institutional etc.), **D** and all types of marketing medium have not be drawn;

- the dynamic of the ratio between demand and tender appears as a necessity and, starting from this market's situation (condition for identifying the value of the ratio in comparison with **1**

value), all the team involved in marketing, management, communication, image and public relations uses the same global view;

- all the factors that can influence the game of demand and tender in a market are also pointed – they are interactive stands within a stadium; we consider that 14 factors, named as marketing medium, can show all types of relations between the market that has to be analyzed;

- it is very easy to identify all types of consumers, all types of target segments, target public and the difference between them.

From the point of view of their behaviour, these mediums have an interactive role, like people watching a football game – sometimes, these decision people from the 14 marketing media can sustain the market game or, on the contrary, can oppose it.

On short, the institutional medium, technological, scientifically and/or mass media etc., can be either pro, or against the business in the market.

We can generalize, if it is spoken about products and/or services, so that the model can be useful for non governmental organization, public administration etc.

Any type of product or service that is coming from any type of an external marketing medium, can be put in the middle of the football arena, so that all the advantages of an external medium will appear immediately.

Disadvantages of amphitheatre view

The model does not answer to the question *HOW should I play in the market-football ground, WHICH are the strategies and tactics for a marketing war,* so that it is necessary a focusing within the football ground.

Another disadvantage consists in the fact that this model does not point the targeted market – the targeted segments.

Two solutions are possible:

1- either a new figure that eliminates these disadvantages is designed separately and by the help of a link is following immediately after figure number 4;

2- either figure number 4 is improved.

The objective of the new innovation process is to eliminate the disadvantages and to underline the role and the importance of marketing mix, in order to give the right perception not only to marketers, but to specialists in communication, image and public relations.

Analogy between a table with four legs, in order to give a global view of the marketing mix meaning can be useful, but, in the same time, is limited, due to the fact that the table's perception is a static object. Once is put in a dining room or living room, the length of the four legs is fixed.

It is proposed the term *dynamical marketing mix* and a new comparison with a *marine platform* with *adjustable or telescopically leg,* in order to keep the products, services and the consumers on the same horizontal platform. You will ask me why to do this?

First of all, because I noticed that few people are able to link inside their mind the **4 P** (**P**roduct, **P**lacement or distribution, **P**romotion and **P**rice); secondly, the market is changing, exactly like a sea that now is silent and other time is stormy due to a changing situation, that can be: 1 - either a new comer in the market that can produce more or less a stronger vibration, a wave; 2 – either an atypical situation, such as, ending of a life cycle and following a new NADA, a catastrophe - earthquake, inundation, war – events that can modify the demand. This new situation must catch the attention of the manager and adapt immediately the already designed marketing mix.

On short, *motion produce changing* and the last one must produce *adapting of the mix*.

Conclusion

Dynamic mix of marketing should be a better concept together with a *marine platform* (with telescopically legs), as a better analogy – analogy is also considered a scientific method that can improve using of the models with all their types of limits.

The radar of a marketer is symbolized like a funnel and its main function is scanning and monitoring, in real time, the whole market. So, the marketing mix viewed like a part of a cone – see figure 5 - can be a transformed into a full cone that become a radar symbol and *working instrument*, at the same time, for the producers.

The same analogy is useful to transform the Maslow pyramid into a radar symbol by the help of *needs' mix*. The consumer is using his own radar to satisfy not only his needs, but his own NADA - *bait for the fish*.

Figures 5 and 6 shows the marketing mix from the perspective of the producers and *NADA mix* from the approach of the consumers who are running in the market in order to satisfy their needs and not only.
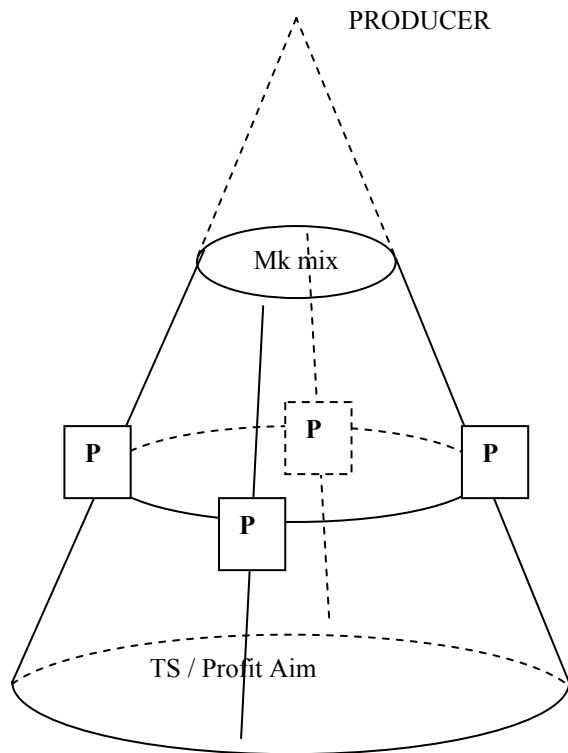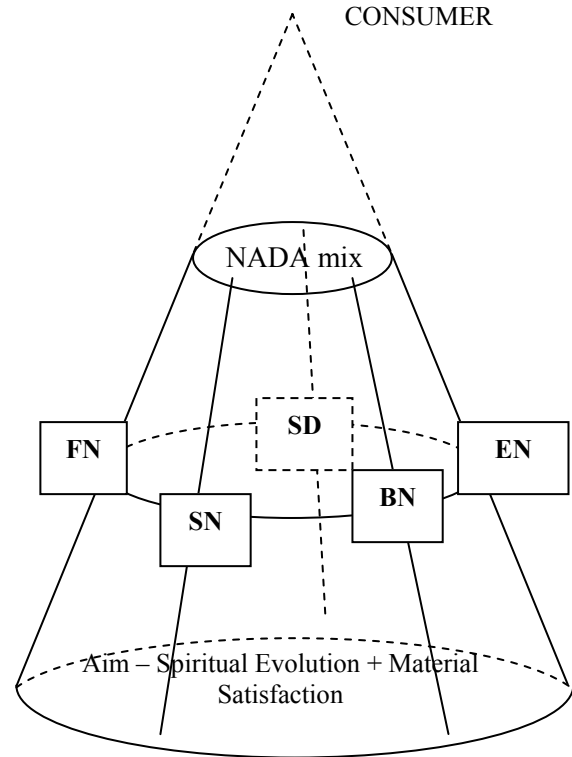
Fig. 5 – Marketing mix

TS- target segment.

Fig. 6 – NADA mix

FN-physiological needs; SN-security needs; BN-belonging needs; EN-esteem needs; SD- self development needs.

Let us transfer and define the market of the 1 – emitters **E**, 2 – receivers **R**, 3 – intermediates **I** that can be 3.1 – prescribing people **PP** and 3.2 – distributors of message **DM,** with or without the product itself. What did we get? The same model, very useful in understanding the market of communication.

As we can see, substitution method is a scientifically one used not only in mathematics, but in communication field, too – see figure nr. 7.

What about the demand and tender? Communication is a basic need placed by Abraham Masslow on the third level, but it is any time an instrument for satisfying, direct or indirect, all the other needs. The demand of communication within open societies and globalization trend does exist – it is a fact in primary reality. That is why, logical sense tells us that the tender is an effect for the main cause that is the demand.
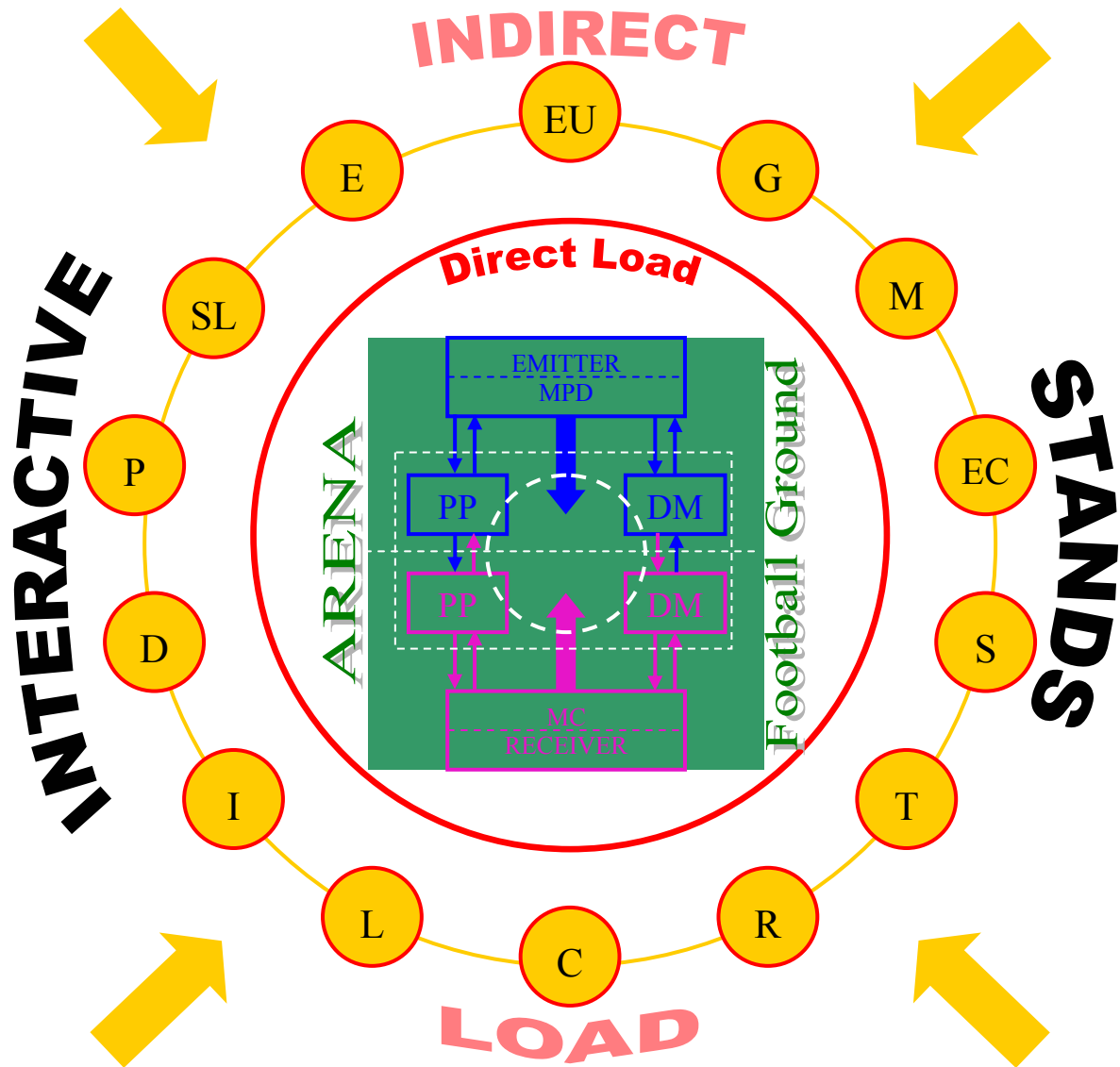
Fig. 7 – Structural and functional model of communication market

MPD-producers'message; MC-consumers' message; IN-intermediates network for messages; DM-distributors of message; PP-prescribing people of message; CT-tender of communication; CD-communication demand; E-economical medium; SL-social medium; P-political medium; DM-demographical medium; I-institutional medium; L-legislation medium; C-cultural medium; R-religious medium; T-technological medium; S-scientific medium; EC-ecological medium; MM-mass media; EU-European Union medium; G-globalization medium; ED-educational medium

What about the effective demand? Very easy to demonstrate that all three conditions are satisfied, such as: the NADA exists, the power of purcahasing for a newspaper, a TV or radio subscription exists, options, too.

Which are the distributors of message? Either press networks that are selling their tangible product such as newspapers, magazines, television and radio programmes etc, either mass media itself, seen as an independent business.

Now, we can substitute message's distributors with **p**ublic **r**elations (**PR)** events or **c**ompanies **PRC** and, as we can see, the market of PR is using the same model of the amphitheatre.

Anytime we must adapt and change marketing objectives in connection with strategically objectives for the management and, on the other hand, with communication objectives, image and public relations too.

The model is still functioning.

Now, is time to speak about **communication mix CM**, defined by changing the **1P** – **P**roduct with **M**essage – this means the **1M -** so that this **new mix in communication and public relations** is the **1M** + **3P**: the **3P** have the same meaning like in marketing. **P**rice is the cost of the whole campaign that can be seen as the price to multiply the impact of the message against the audience. The other 2P are also the same – **P**romotion of the *message* and **P**lacement of it, that means distribution of the message **DM,** see figure 8 and 7.
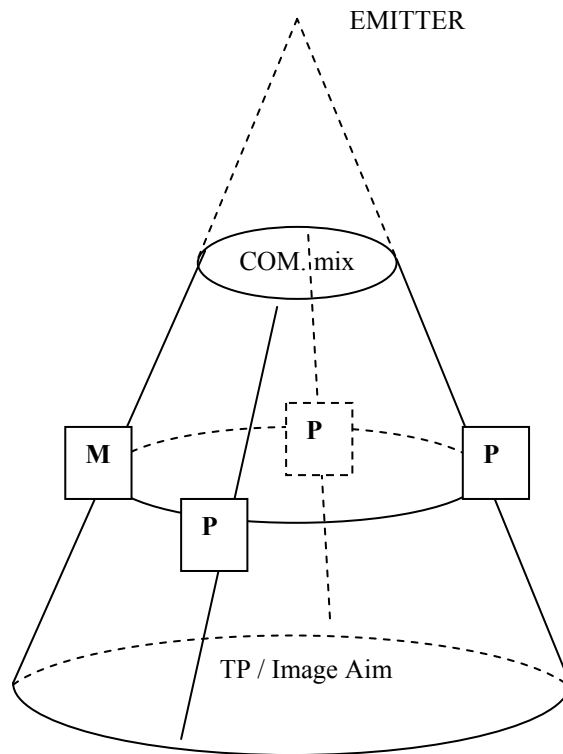

Fig. 8 – Communication mix

This means that the amphitheatre model still works in communication, image and public relation field – see figure nr. 7

*The communication mix **CM** consists in **1M** + **3P** and it is *a better solution* from the management and marketing approach on communication.

7. SOLUTIONS AND CONCLUSIONS

Coming back to the consumer, the art director must work within a specialized team composed from a marketing specialist, a psychologist and a sociologist. Why? Everybody knows that not only motivations of a consumer must be known, but the way of taking the inside decision is very important, too.

On short, what is specific to the background of an art director, a psychologist and a sociologist is good, but not enough, is necessary but not sufficient. All of them have no marketing and management knowledge, due to the fact that a way of thinking competition in the market is not developed within the universities.

That is why the objective of the paper was to find a simplified model that must be easy in use and necessary to link the personal relations within an advertising agency or a marketing one, in order to eliminate the gap of the specialists background – communication, image and public relations versus specialists in marketing and management.

8. DIRECTIONS

Another paper, focused on communication mix, strategies mix will be enough innovated, in my opinion, just to improve the ability of specialists working in interdisciplinary field – see orientation by the help of a pragmatically linguist, useful and necessary in communication, image and public relation and negotiations.

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LA POLITIQUE DU PRODUIT TOURISTIQUE
DE TYPE ECO-RELIGIEUX

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Résumé: L'offre touristique de notre pays est abondante et diverse. Parmi les nombreuses attractions naturelles et anthropiques on peut remarquer des sites et des monuments d'architecture religieuse qui ne confèrent une identité spirituelle propre, dans l'espace culturale européen. Avec les instrumentes du marketing touristique on peut identifier et joindre ces objectifs et, par ce fondement, on peut construire un produit touristique particulièrement, qui peut être incluse dans le circuit touristique international.

Au cours des dernières années, on constate une forte expansion du phénomène touristique, parmi les causes du ce processus pouvant être mentionnes le besoin de s'évader du périmètre des grandes agglomérations urbaines ou des zones consacrées pour le tourisme, la diversité des besoins touristique, l'apparition des nouvelles attractions touristiques.

Les zones rurales sont perçues comme des oasis de tranquillité ou se gardent les traditions et les habitudes, se conservent les valeurs spirituelles, se trouve une nature riche et nonpolluee. Le tourisme rurale est base sur trois coordonnes (Bran F., Marin D., Simon T., Turismul rural. Modelul european., Ed. Economica, Bucuresti, 1997, pag. 7,8): l'espace, forme par plusieurs entités, les hommes, qui offrent l'hospitalité traditionnelle et les produits.

Dans l'opinion des mêmes auteurs, le produit touristique rural est assimile comme l'habitation a la ferme rurale, ce qui est équivalent avec les vacances et le loisir dans l'espace rural.

La valorisation du potentiel naturel et culturel du l'espace rural permette l'identification d'un nouveau mode de développement socio-économique, qui suppose une participation active de la

population locale a l'activité touristique, dans une manière unitaire.

Près de ces aspects, dans notre pays, on peut identifier un important élément d'attraction, la vie spirituelle qui se déroule dans les logis monacaux.

Si la motivation touristique principale dans les zones rurales est, pour première importance, l'image idyllique de la vie des paysans, déroulée dans un cadre naturel nonaltheree, on pourrait ajoute - avec les limites de rigueur- une motivation pure spirituelle, les vacances passes près d'une monastère.

Dans une vision de marketing, le produit touristique est fonde sur l'attraction naturelle ou anthropique, a qui on ajoute une série des services de base: les logis, l'alimentation, le transport et l'agrement.

Le produit touristique culturel et pour loisir avec des valences écologique est fonde sur des cadres naturels différents, sur des traditions nondenatures, sur des objectifs naturels et culturelles, sur des hommes très hospitaliers.

A tous ces éléments fondamentaux on peut ajouter les traditions spirituelles, qui ont l'origine dans une vie religieuse déroulée d'une manière pas d'interruptions, identifiée avec l'histoire d'un certain peuple.

Ainsi, on pourrait dire que le tourisme eco-religieux peut être compris comme le tourisme qui est fonde sur des attractions naturelles, qui se peuvent trouver près des villages et des attractions spirituelles, religieuses, par des objectifs de nature religieuse, qui se retrouve dans la proximité des villages, dans le même cadre naturel.

Le patrimoine spirituel, religieux du notre pays, pourrait être valoriser dans une manière propre, correctement, avec attention et responsabilité, pour ne détériorer l'équilibre fragile entre l'isolation spirituelle, qui constitue l'essence de la vie dans les monastères et l'ouverture sur le monde.

Situes, les plusieurs fois, dans la proximité des villages, beaucoup des monastères constituent des traditionnelles attractions touristiques (les zones Maramures et Bucovina, ont été déjà connus dans le tourisme international).

A ces zones on peut ajouter des autres destinations touristiques (Muntenia, Oltenia, Dobrogea etc.), riches en traditions religieux, qui définissent l'essence spirituelle du notre peuple.

Certainement, la demande touristique de ce type se structure dans une manière différente.

Les personnes qui désirent passer les vacances dans un cadre naturel rural, avec des paysages naturels nonaltheres, près d'un logis monacal, a la recherche de la source de la vie traditionnelle, ont un certain profil de l'ame. Peut être qu'ils sont des hommes qui ont une vie professionnelle très stressante, avec des multiples responsabilités ou, peut être ils sont des hommes

simples, qui ont une croyance très forte, un fondement spirituel nonalthere.

Près de ces hommes, on peut rencontrer des familles qui ont des enfants écoliers, avec une éducation qui ne pourrait être complète sans connaître et acquérir les grands percepts moraux qui sont incluses dans notre religion chrétienne, soit qu'elle est catholique ou orthodoxe. Ces produits touristiques, fondes sur l'attraction rurale et spirituelle, peuvent être offris avec l'habitation dans une ferme, chez les paysans ou dans les logis des moines ou des nonnes. Ils peuvent manger des nourritures fraîches, récoltées sur les territoires qui appartiennent aux paysans ou aux monastères. Les touristes peuvent arriver ici soit avec leur propre automobile, soit avec un transport organise par une agence du tourisme.

Les visitateurs peuvent travailler avec les paysans, dans les activités liées d'une vie a la ferme, ayant la satisfaction de leur travaille.

En même temps, ils peuvent vivre la vie spirituelle, en participant à la messe, sans troubler l'usage de la vie des monastères.

Pour assurer la réussite des vacances, il faut exister une bonne collaboration entre les organisateurs, les communautés locaux, les paysans, les responsables des monastères et, évidemment, les touristes.

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LA POLITIQUE PROMOTIONNELLE POUR LE TOURISME DE TYPE ECO-RELIGIEUX

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Résumé: *Le processus d'intégration du notre pays dans les structures européennes mets ainsi des problèmes liés de la difficulté de réaliser cette démarche, aussi que des opportunités qui peut être fructifies. Parmi les chemins qui peuvent contribuer à l'enrichissement du patrimoine cultural européen, on peut consolider une politique du marketing touristique qui promeuve le tourisme de type eco-religieux, fonde par les traditions spirituelles du notre peuple et qui ne confèrent une identité propre dans l'espace européen.*

Dans une vision de marketing, le produit touristique est forme par des attractions touristique naturelles ou anthropiques, auxquelles on s'ajoute une série des services de base: les logis, l'alimentation, le transport et l'agrément, services qui concrétisent le produit.

Dans son cas particulièrement, le produit touristique eco-religieuse peut être comprit comme le produit qui se forme par une attraction d'espace rurale, avec des valences écologiques et qui est complete ou enrichi par des attractions, des objectifs de nature spirituelle, religieuse. Ces dernières attractions correspondent à des besoins qui peuvent être satisfaite dans une ambiance typique, spécialement liées des certains monuments ou sites avec des profondes semnifications religieuses.

Ce produit est, dans sa façon, unique. Il responde a une demande touristique spéciale et satisfait des besoins spécifiques, pour les hommes qui sont fatigues de tant civilisation, d'un rythme alerte de la vie, d'aliénation.

En même temps, doit être offrire avec des limites qui dérivent justement de son spécifique; on ne doit pas deteriorer l'equilibre, la fragilite de la vie d'un monastere qui peut etre perturbee par les visites des touristes.

Les touristes peuvent arriver dans les villages soit avec leur propre moyen de transport, soit dans une manière organise par du tour-opérateurs, agents de tourisme, mairies ou représentants des monastères.

Ils peuvent dormir soit dans les villages, aux maisons des paysans, soit dans les monastères.

Dans notre pays, le produit touristique de type eco-religieux peut être rencontrer en diverses zones géographiques. L'une de plus connue zone c'est Bucovine, territoire riche tant en paysages naturels et traditions culturelle, que dans une vie spirituelle, religieuse très forte, qui se déroule dans et prêt des vieux monastères orthodoxes.

Le processus de valorisation du patrimoine naturel, culturel et spirituelle du notre pays est complexe et suppose une série des étapes qui doivent être suivi.

Par la constitution de l'organisation ANTREC (Association Nationale pour le Tourisme Rural, Ecologique et Cultural) et par la Loi 145/1994 concernant les facilites qui s'accordent pour développer le système de tourisme rural dans les zones montagnes, Delta du Danube et le littoral de la Mer Noir, se sont fait les premières passes.

La politique promotionnelle pour le produit touristique eco-rural et religieux contient des séries d'activités différentes et vise la communication du ce produit en plan national et international, avec des moyens spécifiques.

La publicité pour ce produit peut être réalise avec préséance par des brochures et des catalogues qui pressentent l'offre touristique des villages, des gîtes qui sont situent près des monuments et objectifs religieux.

Parmi les moyennes de publicité directe, l'Internet constitue l'un de plus efficace. On peut réaliser un site avec la présentation des ces attractions, accompagne par des adresses de contact pour réserver les places désires.

Une autre possibilité de présenter ces offres touristiques c'est la participation aux foires touristiques thématiques, en plan national et international.

Ici, la présentation -réalise par des catalogues et brochures- peut être accomplie par des démonstrations diverses.

Les matériaux publicitaires doivent être réalises dans les meilleures conditions avec suffisamment temps, pour être connus par les distributeurs du tourisme.

Ces produits touristiques peuvent être offrîtes par des prix convenables, y compris le transport jusqu'à destination ou des circuits qui inclussent la visitation des diverses objectives culturelles, religieux ou architecturalement.

Pour une identification meilleure des ces produits, il faut construire une marque forte, qui les identifie et qui garantie la qualité de cette offre.

Par des diverses activités de relations publiques (des rencontres avec la presse, avec des spécialistes du tourisme, des autorités locaux ou centraux etc.) on peut réaliser une bonne identification, une image favorable a ce genre de tourisme, valorisant les riches naturels, les traditions spirituelles et culturelles, sans dégrader la nature, contribuant a une developpment durable.

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PARTICULAR ASPECTS CONCERNING ETHICS
IN THE FIELD OF TOURISM

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Abstract: *Tourism as such cannot be considered as "good" or "bad", or "positive" or "negative" action. But its wide range of effects can be considered from such a point of view. Both economic and social effects of tourism depend on the behaviour of all those involved as well as of respect for certain ethical rules.*

During the lasts years, it became more and more clear that ethics should be considered when discussing tourism development. Thus, in 1992, a proposal was made for the establishment of a committee to deal with ethic aspects in tourism, and in 1999, World Tourism Organization issued a code of ethics in tourism.

The real reasons for all negative consequences are people's attitude towards tourism, attitude not once in conflict with ethical rules. Real profits in tourism (economic, social, cultural) would have been bigger if ethical rules had been better preserved.

1. NEED OF ETHICS IN TOURISM

First and foremost, tourism is a form of human behaviour. Man is the major subject of tourism and there is no understanding of aspects concerning tourism, unless there is good understanding of human aspects.

Contemporary tourism is a social process, part of the contemporary life-style. Before modern times, social relations were functions of social proximity. Local communities, including local sets of values, local culture established links between individuals generating cohesion to social groups generally characterized by stability.

Urbanization process generated a major change. Mass migration from rural areas to towns and rapid development of towns determined dissolution of traditional local communities and a decay of friendship relations, the feeling that an individual belonged to a stable social group. In a big city, distance between family and nation is huge and only partially covered by professional relations. In a "mass culture" society, all values are mixed; an individual is just another single one among a "mob of singles".

Thus, a third stage is reached, i.e. a "tourism based" world. This process takes place in different parts of the world, starting with the most developed but gradually spreading all over the world. Tourism is quite frequently associated to the concept of "new colonialism", due to the fact that the developed countries impose all aspects of the trend.

Furthermore, tourism is no longer just a way to spend your holiday, although most holidays are leisure – oriented. It is also a means to reach different other goals, such as increasing knowledge, developing social relations, going on a pilgrimage etc. That is the reason why international tourism is considered to be able to determine social and cultural changes, due to economic, social and cultural contacts between people coming from different parts of the world.

But scientists do not highlight only positive effects. Tourism is also responsible for negative effects, such as decline of tradition, bigger interest in material values, increased criminality, drug consumption, social conflicts, more crowded places, negative impact on environment, bigger dependency of poor country to industrialized countries (which are the main financiers due to investments in tourism and citizens travelling). All these aspects were identified as *"social negative costs"* of tourism in the countries of destination. Till the end, they can even affect the image of that country as a tourism destination.

Tourism as such cannot be considered as "good" or "bad", or "positive" or "negative" action. But its wide range of effects can be considered from such a point of view. Both economic and social effects of tourism depend on the behaviour of all those involved as well as of respect for certain ethical rules.

During the lasts years, it became more and more clear that ethics should be considered when discussing tourism development. Thus, in 1992, a proposal was made for the establishment of a committee to deal with ethic aspects in tourism, and in 1999, World Tourism Organization issued a code of ethics in tourism.

The real reasons for all negative consequences are people's attitude towards tourism, attitude not once in conflict with ethical rules. Real profits in tourism (economic, social, cultural) would have been bigger if ethical rules had been better preserved.

2. BEHAVIOUR OF PEOPLE INVOLVED IN TOURISM

There are three categories of people involved in tourism:

- The tourist, whose behaviour can be evaluated as compared to him or herself, to the other tourists or towards the local inhabitants
- The local inhabitants
- The tourism agent as a company.

An ethical evaluation of each category is to be carried out while trying to define tourism deontology.

2.1. Tourist's Behaviour

Travelling enables tourists to get in touch with other people, with different culture or environment, but also to know themselves better. Tourists should make efforts to know from the very beginning what is really important and to understand people living at the destination, their culture, life –style or mentality. He or she should avoid looking only for those aspects suggested by advertisements. Usually ads are focused only on some attractions, which are not always relevant. Such an effort should be considered as a moral obligation even before leaving.

Another aspect concerns the idea of freedom. Tourists are free of any professional or family obligation, they can travel where they want, they can do what they want, and they can live any adventures, with no day-to-day moral constraints. This is freedom, but it should not be denying of ethical principles. As tourist, we have the obligation to respect the set of values we share at home, as the local people perceive us as representatives of our communities. And that situation implies responsibility.

Towards other tourist, each tourist is to be tolerant, respectful and helpful in case of need. If there is a group of tourists, each one should try to adapt to the group, to follow the common programme and rules, as a sign of respect towards the others.

Last but not least, native people should be considered properly, not treated as objects, whatever their level of education or colour of skin they have. Manipulation, humiliation or unfair treatment should not be allowed. Tourist attitude towards local people should be tolerant, accepting any differences of race, education, religion, and life standard. It is important to respect values significant to the natives, for example to behave properly in a place with religious relevance.

From another point of view, at destination places, tourist get in touch with people working in tourism industry. Sometimes, these people try to follow the habits of their

customers, although the level of their income is smaller. Sometimes they become alcohol or even drug addicted. Thus, tourist should be more responsible in this respect.

2.2. Behaviour of Local People

In most cases, impact of tourism is felt at a local scale. Host communities are affected by an increased number of people, by pressure on resources and by challenges to local cultural patterns. Intensity of the impact depends on a series of factors, such as type of tourism and growth rate, growth rate of tourist number, season, etc. These types of effects are less resented in those communities where economic and financial benefits are significant. In other cases, host communities may try to put pressure or may be hostile against tourists.

Local people's attitude towards guest tourists should be of hospitality and good will. Tourists have the right to be well informed, to take full advantage of the services provided at reasonable prices. Although it is against ethical rules to cheat or to steal from tourists it still happens. Greed to get higher profits is also a reason for corruption of true cultural values. Sometimes true value become rather "commercial", even fake, sold to naïve tourists.

Tourists are entitled to medical care, proper hygienic conditions and high standard services, according to ethical rules of the community, without disregarding the local inhabitants. Tourists' security should be provided. They should also have the right to practice their own faith and to have access to religious places of their denomination.

No discrimination of tourists for reasons concerning race, religion, nationality or handicap should be allowed. People with handicap should have equal access to any tourism facilities and attractions as anyone else.

Tourism should become a key element for the economic development of society but also for the social and cultural development. It is a means to reduce unemployment, to widen cultural horizon of local people and to improve their mentality. It might help a more tolerant attitude, being "an open window worldwide". It is a means of education, but it shouldn't affect moral standards. Local people should preserve local values and stand against turning tradition into something pure commercial. They should preserve respect for sacred places and for national and cultural identity.

2.3. Tourism Agents' Behaviour

Tourism agents include all companies involved in preparing a trip, transport, providing accommodation and any other services or goods supplied at the destination (accommodation, meals, leisure activities, local transport). Local authorities and governments have also their role.

The most important tasks of tour-operators or travel agents are to provide safe and comfortable transport, as well as security and protection of tourists' rights. They should respect the conditions stipulated in contracts and fulfil all obligations towards tourists. More than that, they should provide enough information before tourists make a buying decision.

Hotels should as well ensure security of tourists, comfort according to classification, good rest and hygiene conditions, high standard services. Special needs of people with handicap should be also considered. Ethical principles impose a certain attitude of employees. They should be and act fair. No immoral practices, such as prostitution should be allowed.

Investors in tourism, whatsoever their field of activity, should take into consideration when making development plans the rights of local people, their interests. Development projects should not affect natural and cultural heritage. Local people should have a right to be employed in the new tourism facilities. They should be properly informed about work or training opportunities as well as about the impact of tourism activities in the area. More than that, host communities are to be invited during the decision – making process. Tourism should contribute to decrease of unemployment but it shouldn't put any over-pressure on local resources, such as water, energy etc.

Local or national tourism administration is responsible for tourism policy, planning and providing conditions for tourism development. From an ethical point of view, it is important to consider all effects of tourism either economic, social, cultural or educational. It is also important that planning does not generate disparities between different areas. It is authorities' task to both to develop infrastructure and to provide proper information about tourism facilities and destinations.

Governments are involved in fighting negative phenomena, such as prostitution or promoting sexual tourism. For example, American laws stipulate harsh punishment for travel agents selling such tourism programmes.

Schools and teachers have an important role. It is their responsibility to educate young people as future tourists, teaching them to respect other people's values, to respect nature, their own culture, as well as culture of other nations.

As a conclusion, the whole activity in tourism should respect moral principles alongside with requirements of sustainable development. Even if breaking a moral rule is not always followed by punishment, all people involved in tourism should act in a responsible way fully respecting the others.

3. ETHICAL CODES IN TOURISM

Many organizations, companies and governments understood the need for ethics in tourism. They started promoting moral principles in tourism activities and even drafted ethical codes. Quite often the objectives are not different from those of sustainable tourism or eco-tourism, but they are

important because they help raising awareness on moral aspects in development and promotion of tourism as well as increasing tourism actors' responsibilities.

Examples of codes drafted by organizations, public administration or companies will be given below in order to have an image about ethical codes in tourism and to underline aspects concerning professional deontology.

3.1. Ethical Codes on a Macro-Economic Scale

These types of codes are drafted at a central level. They are included in the politics of a country, a tourism area or a branch of tourism activity. They are adapted to the features and culture of a particular area. All of them include general moral principles that can guide anyone involved in tourism.

A. Ethical Code of Eco-Tourism Professional Association in Quebec

This code is according to principles promoted by the Canadian Government and is structured in five chapters.

1. Responsibilities and Obligations Towards Clients

In general, there are provisions concerning:

- proper information of clients: before booking, they should be provided with all data concerning services but also their obligation such as not to damage environment etc.;
- supply of all services paid by clients and, if not possible, offering them alternative services or paying them back;
- communication facilities (phone, facsimile, etc.).

2. Responsibilities and Obligations Concerning Clients and Employees' Safety

- proper concern for people's safety and security;
- training for the staff;
- existence of enough staff so that the clients feel safe and properly guided;
- drawing attention of the clients about weather conditions, specific transport, compulsory equipment etc.;
- proper treatment of any animals.

3. Responsibilities and Obligations Towards Members of Eco-Tourism Organizations

- respect for believes and principles of local associations
- co-operation to promote tourism in Quebec area
- common values and standards
- no group should be favoured

- no non-loyal practices against other member organizations.

4. Responsibilities and Obligations Towards Local Inhabitants

- be aware of your own responsibilities and do not get involved in non-loyal activities;

- indirect methods to lure clients or local inhabitants are forbidden;

- co-operate with local authorities;

- assume your responsibilities whenever people or goods are in danger;

- manage your activity according to government's ethical codes.

5. Responsibilities and Obligations Towards Environment

- awareness of the need to preserve and use resources in rational way;

- respect for the property rights of the local inhabitants;

- co-operation with local manufacturers and managers in order to improve management models;

- no destructive action against fauna and vegetation.

This is a general code. Canada is a country with a wide range of opportunities for eco – tourism. Eco – tourism is considered to be an important activity, but the need to protect resources is highlighted. On the other hand, is rather an enumeration of ideal concepts with no sanctions for those breaking the rules.

B. Ethical Code for Sustainable Activity in Costa Rica

The Code was drafted by The Institute for Central American Studies – Travel Department. It is adapted after the ethical code of the World Tourism Organization. Each chapter takes into account features of the country. Some ideas are listed below.

- Tourism should take into account cultural aspects. Tourists should have an opportunity to learn about a country's culture. Tourists should create links between different cultures on the globe.

- Tourism is to have a positive impact on local communities. Tour-operators should facilitate access of local communities members to the opportunities given by tourism activity by hiring local guides, developing HORECA activities with local owners, buying souvenirs from local manufacturers, etc.

- Tourism should be sustainable. Tour-operators and tourists should encourage local decision – makers to develop and implement long-term management plans able to prevent over-crowding, pollution, threatening of eco-systems.

- Waste should be recycled.

- Natural habitats should not be disturbed. Tourists will keep distance and should not intervene. Costa Rica has many eco-systems that are to be better protected, such as coral reefs and caves.

- Trade with artifacts should be banned. International laws ban trade with relics but this is still present in under developed countries. The code establishes harsh sanctions for breaking this rule. A national campaign to stop smuggling is carried on.

- Tourists should develop a better understanding for environment protection. Specialized guides and biologists should advise them and answer any of their questions.

These are but some of the aspects dealt with by the ethical code. There are a lot of detailed explanations concerning the existing resources but establishing limits in using them, keeping in mind the negative effects of chaotic tourism activities in some South American countries. Some tourism objects were completely destroyed by such activities. Specific sanctions are established for every break of the rules.

C. Ethical Code of the American Travel Agents Association

It is a general document and starting point for individual ethical codes of travel agents in the USA. Each member of the association is to comply with this minimum set of principles otherwise being expelled from the organization.

Responsibilities of the Members

- Exactness – obligation to provide exact information about services provided by them

- Disclosure – full detailed information about terms of contracts, including cancellation and fees

- Instant notification about any changes concerning services, price etc.

- Supply of all services mentioned in brochures

- Responsibilities – prompt answer to any claims from the customers

- Co-operation – quick answer to any questions raised by the clients

- Trust – no misuse of data concerning clients or employees

- Confidentiality – no details of transactions with clients or information to be disclosed without client's prior agreement

- No association between a client's name and the company without the client's agreement

- No recommendation letters are to be issued for money or other benefits to any person who does not have expertise to work in the field of tourism

- Conflict of interests – rules concerning relations with suppliers

- All members of the association should comply with all national laws.

The code is rather strict but being a member of such an association proves integrity, expertise and fair business conduct. The code includes general values of the American society such as fair business conduct and respect for citizens' rights. Breaking the rules determines different sanctions including losing the license of the travel agent.

3.2. Ethical Codes of Tourism Companies

Usually, these types of codes are drafted for the internal ethical and administrative needs of organizations. More or less in detail, they are rules to be obeyed by the employees of tourism companies. Employees can use them as reference models for their behavior and as guidelines for professional deontology.

Some examples belonging to worldwide known organizations are presented below.

A. Ethical Code of ACCOR Group

ACCOR Group is one of the biggest hotel groups in the world. There 14 brands (hotel chains): SOFITEL, NOVOLTEL, LES JARDINS DE PARIS, MERCURE, ETAP, FORMULE 1, IBIS etc. The group operates its own hotels or affiliated hotels by management, rent or franchise contracts. ACCOR Group has more than 2,500 hotels in 72 different countries.

Taking into account the size of the company, it is obvious that a certain common standard should be as far as staff behavior is concerned. The ethical code presents the Group's set of values and the principles they believe in, foster and use in their activity: quality, innovation, decentralization, profit, expertise, communication, growth, participation.

A selection of the principles is presented below.

Rules of Behavior

For the Employees:
- economic and effective use of resources;
- protection of people and goods under their responsibility against accidents, thefts, illegal use;
- no money or gifts, excepting the regular or symbolic ones, can be taken in order to take a certain decision;
- no use of information got at work place in personal interest;
- all business information are confidential;
- training is an important part of activity;
- awareness that there are no "life-long" positions.

With Respect to Suppliers:
- suppliers are to be informed that company's policy is not to accept gifts and to encourage them to complain about any unfair treatment from the company's staff
- selection and long-term relations with suppliers based on the quality/price ratio and portfolio of services
- honest and respectful relations with suppliers.

With Respect to Clients:
- terms of contracts should be complied with as far as products, quality or services are concerned
- over-bookings are to be avoided
- no bribing is accepted in order to get a contract and no commission fee from the client
- to be able and willing to admit your own mistakes
- no preferential behaviour is admitted.

With Respect to the Others:
- all people are worth of respect and no discrimination or exclusion according racial, sexual or religious aspects is admitted
- relations with colleagues and people with higher or lower hierarchic positions should be characterized by loyalty and co-operation.

With Respect to Tourism Industry:
- no arrogant attitude
- no non-loyal activities with respect to competition
- constant interest for the brand's image.

The code establishes also rules concerning relations with authorities, shareholders, and mass media. In case of conflict of interest situations, recommendation is to inform management. As there are no sanctions in the code, it is management's role to promote a strong organizational culture and a common set of values shared by all employees. The final provisions of the Code are:

"Ethics is possible only if there is free will."

"Ethics is part of the possibility to choose."

B. Ethical Code of Hotel SOFITEL Bucharest

SOFITEL Hotels is the brand that brought the now-a-days recognition to the ACCOR Group. They became part of the group in 1980, when ACCOR became the major shareholder.

SOFITEL is the most important network of European luxury hotels. Most of the customers are managers traveling for business purposes or on holiday.

SOFITEL Bucharest is the result of a management contract between ACCOR and World Trade center Bucharest. It is a four-star hotel with 203 rooms. Even if SOFITEL belongs to the ACCOR Group, a code of ethics was created for the hotel in Bucharest taking into account local features. It is a detailed document explaining in five chapters the responsibilities and professional obligations of the employees.

There are some of the stipulations below:

Chapter I – General Stipulations

This code is a guide for the employees of SOFITEL to help them comply with the ethical standards of the ACCOR Group. There are several rules to be obeyed by everyone while dealing with administrative aspects, time of work, absences, leave – offs, sanctions.

Chapter II – Responsibility towards the Employees

- constant respect;
- decisions concerning employment will take into account only professional reasons such as qualification, expertise, work record;
- no abuse or harassment is to be tolerated;
- safety and health: healthy and safe work environment by complying with rules and regulations.

Chapter III – Responsibility towards Clients and Consumers

- quality and safety of products;
- sales and marketing:;
    - developing long term relations with clients by proving honesty and integrity;
    - legal and ethical driven business;
    - no blackmail or bribing;
    - it is completely forbidden to use any confidential data about clients;
- constant interest for the brand's image.

Chapter IV – Responsibilities towards Community, Governments

- services for the community;
- personal activities for the community: our employees are free to support community, charities or political organizations according to their free will, as long as they do not claim that their position is the official position of Sofitel;

- we'll protect environment by complying with all legal stipulations;

- we'll respect all rules and regulations of the countries where we carry on activities;

- Sofitel is to obey any anti-corruption or similar regulations.

Chapter V – General Rules of Discipline, Awards and Sanctions

- awards are to be given only to those who work motivated, thoroughly and according to quality standards;

- promotion of employees is made only according to expertise;

- all members of the staff should prove proper behaviour towards clients treating them in a polite manner;

- it is completely forbidden any deed able to disturb order and discipline such as:

  o drinking of alcoholic beverages during work time;

  o use of rooms or areas for customers' use;

  o use of un – proper language towards customers or colleagues;

  o selling or buying any goods from or to customers or clients;

  o leaving the place of work for long periods of time during working hours.

Providing any of the above mentioned deeds happen, management is free to implement any of the following sanctions: verbal or written warning, a 10 – 15 % cut of wages for one to three months, change to a lower position for one to three months, dismissal. Providing sanctions are taken against people that can prove they are innocent, rewards are to be granted.

All these stipulations are to be known when getting a job with the hotel. The new employee is to give written acknowledgment.

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LEADERSHIP DIMENSIONS IN QUALITY ASSURANCE

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Abstract: *The organisation is made up of groups of people, therefore coordinating and directing the efforts of their members towards reaching the goals and objectives of the organisations is an essential part of the management. In quality assurance (see the eight quality management principles from ISO 9000:2000 and ISO 9004:2000) to choose an appropriate form of behaviour is a major factor for managers. The managers must understand the nature of leadership and the factors that determine the effectiveness of the leadership relationships.*

Understanding the leadership

The success for the implementation of quality management systems relies on several factors, yet not less important is the impact of leadership. A polysemantic word that cannot be translated into Romanian by only one word comprising the real meanings of the notion, leadership is still climbing the career leader in the management literature. When it comes to communication strategies in an organisation, the notion of leadership is mentioned again. The development of amiable interpersonal relationships based on trust and co-operation is connected to leadership, and the starting point in formulating different politics for motivating the subordinates is leadership, too. Inevitably the question arises: *What is leadership?* A synthesis made by Andrew J. DuBrin (1995) presents the most representative definitions of leadership as it follows: interpersonal relation based on direct and sincere communication for meeting the goals; the art of influencing people by persuading or by personal example; the main dynamic force that motivates and co-ordinates the organisation for accomplishing its mission.

Out of other over 100 definitions preserved for the concept of leadership, G. A. Cole (1997) presents leadership as a dynamic process of group work, belonging to a person over a certain period of time, within an organisational context, by means of which other members of the group are convinced to get involved in the fulfilment of the group's tasks or of its objectives. Any member of the organisation can have a certain influence, therefore each can be employed in a leadership process, especially when there are imposed the problems of improving the quality of goods offered to the market. Actually these arguments caused the coming out of *quality circles* which exploit interpersonal relationships at the work place to get innovative ideas with a high potential of redefining the parameters of quality for products and services. The quality circles form, according to our opinion, a *social dimension of quality*, because these teams include not only specialists in quality but also employees form all organisational subdivisions, employees who should think, discuss and change. Thus the objectives of quality centres are the contribution of the employees to the organisation's development the creation of a relaxing atmosphere for work, respect for the others and the will to do their best within the company.

Of all points of view that have been presented so far, a common characteristic for all definitions results: leadership is a complex process that is defined in group terms, refers to the participation got by non-coercive measures and has as a finality the objectives' achievement. After consulting several bibliographical references (Bennis, W., 1984; Catană, D., 1994; Covey, S. R., 1996; Ilieş, L., 2003; Johns, G., 1998; Likert, R., 1964; Mihuţ, I., 2003; Napier, R. W. & Gershenfeld, M. K., 1993; Tichy, N. M. & Cohen, E., 2000) we can conclude that at least for these elements of leadership there are no controversies. The basic characteristic is that leadership is the ability to inspire and stimulate the members of the group to acknowledge the fact that achieving quality, namely success is worth doing. The meanings of quality are translated through leadership's perspective in: (Rusu, C. & Voicu, M., 2001): *increasing the level of customers' satisfaction, making products that are asked on the market, maintaining and developing the competitive advantages in front of the competition and achieving performing financial results.* Therefore we can appreciate that leadership is a social phenomenon that requires a total participation to the life of the group. The quality cannot be obtained without the contribution of all employees. *It is leadership that changes the perception of quality*; it is an extremely labile process because over time the exigencies and the needs of the group are changing. At the same time, leadership is conquered and maintained by the power of interactions that are born inside the organisation.

The results of a research concerning leadership and quality assurance

The transport's development in our country has caused the coming out of new enterprises whose object of activity is fixing means of transport. Within this context we have to consider the setting up of the business firm S.C. ISEOM S.A.[1] of Tg.-Mureş, in 1990, having as profile of activity fixing motor vehicles and being based on the structure of an enterprise established in 1948. The old motor workshop has gradually turned into a middle-sized enterprise, with a share capital of 5.8 billion lei and a turnover of more than 80 billion lei, about 200 employees and a continuously expanding domain of activity. Two surveys have been made to identify the dimension of leadership at S.C. ISEOM S.A. The first one was based on questionnaires applied on a sample of 56 people (workers, foremen, department heads), a simple sampling being made randomly, where each employee had an equal chance to be selected. The other survey included the eight managers of that business firm. Direct observation has been used for picking up realities and this has offered further data for supporting the conclusions.

Leadership is performed first of all by mechanisms of decision making at the level of the firm and that of the places of work. Work's satisfaction or non-satisfaction can be caused by the very involvement of employees in decision making. The percentage of almost 60% of employees who haven't taken part to the decision-making concerning their work is alarming. If one is to establish a correlation between the number of those who didn't take part to decision making and the importance of the participation, there can be concluded that for 75% of the employees who didn't take part to this decision making, their involvement would be *very important* and *important*. Therefore the employees are frustrated because haven't fulfilled this wish.
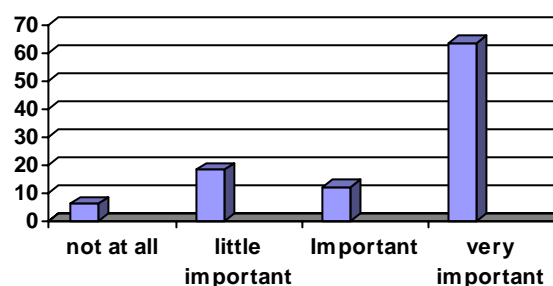

Fig. 1. The importance of taking part to decision making

If leadership, as a basic principle of quality management means motivation and participation, the perpetuation of this situation won't be beneficial for the enterprise. This fact has negative effects on the activity's improvement at the workplace, an affirmation supported also by

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[1] The name of the company is not real because of confidentiality reasons.

the answers given to the question "To what extent have you improved the activity in your department?" 60% of the employees answered with *little* or *not at all*, because they hadn't actually been involved in the decision processes that regard them directly at the workplace. This aspect is considerably serious from the point of view of quality assurance. Organisational practice demonstrates that leaders (if there are any in the leading position) get efficiency and effectiveness in their actions through a close collaboration with their subordinates. Even if they have organisational capacities and well-designed methods for control, when the subordinates don't perform the required activities or they do this without showing interest, the measures taken by the managers have no consequences. The survey performed indicates that the share of the types of decisions made in the managerial activity is as it follows:

1. *Individual decisions without special explications*   *13,6%*
2. *Individual decisions with special explications*   *32,2%*
3. *Decisions made after consulting the subordinates*   *36,8%*
4. *Subordinates participation to decision making*   *11,0%*
5. *Delegating subordinates to make decisions*   *6,4%*

Contrary to the general opinion of the employees, managers indicate that decisions are made 36.8% by consulting the subordinates. The shares presented so far confirm the fact that employees' share in decision making is low – almost 46% of decisions made by managers are individual. We can conclude that the style is rather *consulting* than *participating* and it can be a launch for doing a real leadership at S.C. ISEOM S.A. Nevertheless we have to notice that if a large proportion of the employees aren't asked about the activity they develop and, more that this, they don't take part to decision making, it is hard to believe that the developed work can follow the way of a continuously improvement of quality. Our research has also tried to identify the dimensions of organisational climate, another variable of leadership. The leading team noted on a scale from 1 (to a little extent) to 5(to a great extent) several coordinates of organisational climate.

Following the forming on the hierarchical system in table 1, we can conclude that the managerial team considers that obeying firm's regulations is of major importance. This has a fully justification because regulations indicate department's duties, tasks and responsibilities for different positions, the extent of authority and the relationships between workers on different hierarchical levels, including the domain of quality assurance. Very close to the score given to this attribute is the interest of the board to favour satisfaction and freedom of action through the organisational structure. It is favourable to combine these two coordinates as this will remove the rigid formalism still met in many enterprises comparable as size and activity to S.C. ISEOM.

Table 1

Coordinates of Organisational Climate	Score
1. The firm would have a better position if interpersonal conflicts were solved	1,5
2. Good bosses give the subordinates complete and detailed information on tasks	3,37
3. Employees should be involved more in decision making process	2,62
4. Regulations should not be broken, even if for the interest of the firm	3,75
5. Organisational structure should give way to satisfaction and freedom of action	3,5
6. Employees should be provided flexibility when contacting different hierarchical levels, without taking into account formal rules	2,62

Another less positive aspect is represented by the fact that the managerial team doesn't give the importance, at least on a medium level, to a basic element of the organisational environment: interpersonal conflicts. The board doesn't consider that the firm would improve its performances considerably if interpersonal conflicts were to be solved.

The destructive character of these conflicts is problematical. No longer under control, they cannot be solved on time, either because the involved parties don't show a real interest, or because there is no culture of conflicts' settlement. Henceforward there are repercussions including on the quality of the performed activities, indicating what the employees of the firm have stated. The same way as with many other enterprises, at S.C. ISEOM S.A. leadership is of a vital importance in quality assurance. Nevertheless, the idea that the leader-manager can heal all illnesses of the system he is running is a myth because quality is got *in the interaction between leader-manager and employee*. At the investigated enterprises the premises of change are partially favourable.

The presented results confirm that quality assurance is connected to leadership only if those who are competent display availability to share resources (knowledge, power etc.) with the other employees of the firm, a thing that is perceived as a contribution to achieve general performances. These stated premises could be fulfilled through the active participation of the personnel to everything that involves decisional mechanisms for quality assurance.

Conclusions

We hope that the research made in a Romanian business firm was relevant to demonstrate that the managers of tomorrow will have to be also real leaders who are supposed to make compatible the expectations of the employees they are running and the characteristics of the offered

goods with the situations given by the dynamics of the quality parameters imposed by the market, respectively to assume the risk of passing from the *traditional administration* to the *supple organisation* where people represent the most important fortune.

From the descriptive point of view, leadership involves *relationship behaviours* which ameliorate interpersonal relationship within the firm and *work behaviours* that help the human resources to accomplish the politics and the objectives in the quality area. Thus leadership is one of the basic principles on which a performing system for achieving quality is built. Numerous shocks and radical changes that cannot be avoided mark the beginning of the new millennium. They are caused by transformations in the economic and knowledge universe. The galloping computing development and globalisation penetrate the logic of economy in all spheres, offering a larger spectre of responsibilities and the assuming of more attributions than in the past.

The entire paper has been written with the faith that behind the organisations that are preoccupied with quality management systems there is leadership - a process that leads us to a new way of reading the management mechanisms for putting into practice the quality principles. The new paradigm, to which also the standards of quality assurance make reference, will change the position of the leader from a simple administrator of resources to the status of a leader-manager that is permanently concerned with the systems of quality management.

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INNOVATIVE ASPECTS OF THE ACTIVITIES IN A TRAINING AND IMPROVEMENT CENTER

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Abstract: *There are presented innovative aspects of the activities in a training and improvement center. A special interest is shown for: natural laws, the change of perception concerning possible success, giving up to unwished habits, general development of society, the main purpose of a dynamic politics for innovation in organisations, innovation management, communication and cooperation. There are presented, too, the results obtained within the training and improvement center within the "Petru Maior" University after 15 months of running.*

The training and improvement center promotes the equilibrium, amends the tendencies of the parties to consider themselves as units, permits a relevant feedback concerning the results obtained – in conditions of maximum transparency, of reducing the informational asymmetries and of providing the maximum access to information through continuing learning.

It is preferable to lead yourself the changing than being lead by it-

- It initiates the evolutionist processes generating controlled
- It is necessary to promote a new logic and a new type of knowledge – the usage, along with the logic of inductive and deductive type, of the abductive logic (induction and deduction at the same time – it is the third way in logic, balance on a long term or the durable development)
- The solutions are always in problems.
1. Developing a creative center for training and improvement imposes the presence of a creative and innovative team capable of organizing and developing activities of continuous formation at a level requested by the participants
2. The practical stages developed in this direction include:

- the participation of the basis team's members at creative applications

- developing interdisciplinary creative teams, which have the necessary availability for innovative programms which use the local synergies.

- involving the participants in creative programms focused on the professional and humane priorities

3. The results of the activities in the creative center for training and improvement include the acknowledgement – by the participants - of the personal and group progresses, which are registered in:

- evaluation and self-evaluation charts

- individual or group projects develope during the programmes of continuous formation

- advertising materials

The results obtained by the team of the training and improvement center University „Petru Maior" in the past 15 months are described below

409 persons have been trained on workshops.

1103 persons have participated in symposia.

10 x 100 = 1.000 CDs on managerial training have been distributed.

6 x 500 book have been published.

The web site**: www.ea.upm/cip**

THE RESULTS

Implementation indexes		total achievements 15 months
name	U.M	
SYMPOSIUM		40
WORK-SHOPS		20
BOOKS		5
CDs		10
FILMS		2
WEB PAGE		1
VIRTUAL TRAINING		20

An great emphasis was put on each participats' obtaining and improving its skills of changing his perception on the exterior reality – according to his own wish.

Perception

- Process through which the perceived stimuli are structured to give a conscious meaning.
- The result of some sensorial information (what is perceived by our senses), of intellectual information (the meaning we give to the image), of social and cultural references modelled by education, culture, tastes and context.
- We measure our perception, sometime unwillingly, according to the interest level. In this we build a meaning.

We can stimulate perception, when we search for original solutions, approaching a phenomenon differently.

The development of the perception capacity lies in measuring our attention when examining a phenomenon. We'll find that there are differences between "to see" and "to look at", between "to listen to" and "to understand", between "to touch" and "to feel".

Habit is often an obstacle in reaching a superior level of our own perception because it "puts to sleep" our attention. Perception is conditioned by the repetition of our experiences, formulas and ideas that consolidate the organisation of our representations. Frequently, our habits slow down our capacity of appreciating positively the new things.

Language conditions the perception: even if it helps us to give a meaning to what we perceive, at the same time it materialises the perception and prevent us from perceiving spontaneously the fineness of what we observe.

It is important to know how to look, consider and study the situations differently – perceiving first the aspects that can be improved.

Laws applied in innovation process

There are natural laws that are applied automatically, whether we want it or not, whether we know about them or not. Among them we should mention the following:

5. **Novelty is a rule, is a permanent presence in the way of seeing and feeling this world.** Everything evolves and is being transformed continuously, each entity passes through an infinite number of innovations- from all points of view- we become aware that evolution is made through repetitive changes- continuous or by leaps or that the present phase is "new", different from the previous one or from the others or it seems different because the context is being changed.

6. **We always choose** the way to answer to life's requests. We live with the consequences. Setting the real priorities is part of life's essence. **We can say that life offers us a good turn when it places obstacles on our way. Because of these obstacles we can grow and develop**

permanently, we can live new experiences, we can live in a total new, innovative way, we can transform ourselves in what we would like to be.

7. Between what is going on to us – stimulus- and our answer, there is our liberty, the power to choose this answer. **Choice liberty** involves endowments like: imagination (the ability to create in our mind beyond present reality), moral conscience (a feeling of good and bad, of principles that govern behaviour), automatic willingness (the capacity of acting according to our conscience, free from any other influence)

8. **Evolution lies in our new ideas about who we are.** We can be those who replace "good" with "better". **Someone may not approve the others' model about life, their ethic and moral thinking, together with their understandings or decisions – but these "others" agree with them relying on their own value criteria – that evolve at the same time with the individuals and with the society.**

9. **Our perceptions and interpretations influence our emotions, deny or don't deny responsibility and bring up accusations.** Accepting responsibility, we will accept our selfishness, dependences and failures, leaving way for generosity, kindness and the right to decide what is right and ethic and what is not. Each of us can make a conscious decision, changing our interpretations- to change our world, to feel more mature and more understanding. **We cannot do something, being completely aware- we can be only completely aware and to act as a consequence.**

Perception change for possible success

1. **The way we see a problem influences a lot its solving.** We ca become aware of the fact that some see a problem where others see only a possible solving, an opportunity.

2. **Surpassing the type thinking becomes critical for our society.** We can overpass the phase of competition with ourselves if we enrich with **a mentality of abundance,** if we consider seriously all our roles and see them all as sides of a whole in a strong interdependence. We can create synergy and equilibrium in during in life if our roles become springs from which we live.

3. **We live in an environment dominated by the verb to do and not to be;** it is easy to be caught in a whirlpool that doesn't have anything in common with our creed and principles, and instead of being governed by our mission, to be dragged by emergencies.

Possibilities for giving up to unwanted habits and the creation of others, new and wanted

1. There are powerful forces of opposition that act for counterattacking any new initiative. We can inventory the moments, places and situations when we can break our own decisions. We can avoid these obstacles and can add other elements that help us to progress and to fulfil our decisions.

2. To end some tendencies such as to postpone, to criticize, to surpass self-imposed norms means for several times a deep reorientation and transformation. We often need the transforming force of an alliance with other people that have assumed similar obligations, of relationships where we are obliged to do something.

The development of the society we belong to, where we are a part

2. Each of us can decide the rhythm and the direction of our development. When many members of an organisation become aware of the fact that interdependence is a value much more useful than independence, then we will know what to do, and- if we are mature enough- we will do.

3. There isn't an easy and fast way of securing life's quality in organisations- personal efficiency, strong and fruitful relationships with the others- without following the natural process of continuous transformation and growing. **Life means stages, phases of growing and developing. Each step has its own importance and asks for a certain time.** The phenomenon of causality in the physics domain functions also in the sphere of emotions, of human relationships and of our own character. **It is impossible to violate, ignore or to frustrate the gradual process of individuals and society development. It's against nature and any attempt to shorten the way leads to disappointment and frustration.** The more we resort to temporary solutions for solving problems and severe troubles, the more chronic and underground conditions and consequences get aggravated. Real maturation is characterized by a step by step process of development.

4. **If planning is based on a purpose or an all-inclusive vision and on the fidelity for a set of principles, then those who are closest to the action and have to orient on the spot, can use their own knowledge and judgement to make decisions and judge. Everyone can be authorized to set objectives and to make plans according to natural universal principles.**

    An active politics of innovation contains:
    - Promoting of persons and groups for innovation, creative and competent;
    - Creation of a positive innovating environment;
    - Devising innovation purposes that are according to the objectives of organisation program.

Important activities:

- Creating and initiating innovating option in relation to changing processes, to those of innovation in one's own organisation;
- Initiation of gradual innovating phases with a clear devised objective;
- Correlation of innovations in a strategic system of the organisation.

Coordinates/ aspects of innovation in a training and improvement center

- Innovations of educational product (new products or services);
- Innovation of methods, as well as modifications in the process of combining the influencing factors;
- Innovations of structure, as well as changes in the coordination of self-imposed tasks of the participants; changes in the reports of authority or of the involvement systems;
- Social innovations – that are connected to behaviour change by means of motivational systems etc.

Innovation strategy – basic questions:

- Where are we? (situation analysis)
- Where do we want to get to? (purpose setting)
- How can we get there? (strategy setting)

There are:

- Basic strategies
- Execution, fulfilment strategies etc.

Forming groups in a training and improvement center

Different results according to professional experience and intellectual aptitudes (training, studies) of groups members.

1. Heterogeneous teams from the professional experience point of view, but homogenous as intellectual training are superior to the other types of teams.
2. Teams which are homogenous as experience and heterogeneous as intellectual training get the poorest results.
3. It is necessary and useful the creation of teams of members belonging to more domains.

Behaviour characteristics and their interdependence with programs functions

Program functions	Behaviour characteristics of people
Orientation to purpose and action	Orientation to risk
Orientation to relation	Orientation to feelings, sensibility
Orientation to structure and speciality/ domain	Orientation to rational
Orientation to order and method	Orientation to order

Structural model - **Behaviour characteristics of people**

Characteristics/ description	Orientation to order	Orientation to risk	Orientation to rational	Orientation to feelings, sensibility
Certainty/ security	Through rules, Phase objectives, traditions	Demolishing barriers/ limits with "cheers"	Through technical tasks and logics	Through acceptance, own opinion, group opinion - adopts
Conflict	Searches of experience, examples, steadiness	Searches of the others' mistakes, sudden landings -resigns, breaking relationships	Solving in the objective/ real plan, inclination to cynicism	Conciliatory, mediator
Specific potential of career	Orientation after rules, progresses through scrupulous fulfilment of methods	Surpassing borders, traditions, rapidity, visions	Realist, lucid worker that acts in a logic, analytic environment	Contact, concluding together with the team, identification with the common purposes

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ADVANTAGES OF USING JOHNSON'S RULES IN JOB SHOP SCHEDULLING

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Abstract: *Operations control concerns meeting the short-term, specific plans. Its principal activities, therefore, are to authorize instructions to complete the tasks necessary to meet customer's orders, to ensure that all requirements to make the products are available as and when they are needed.*

An operational control system has three phases: **loading** *– the initial assignment of a job to a part of the process (e.g. work center or person),* **sequencing** *– determining the best order in which a set of jobs will be completed at each stage in the process and* **scheduling** *– involves the allocation of a start and finish time to each particular order.*

To produce schedules, an organization may start from the capacity and aggregate plans, and produce detailed instructions on the sequence and times for each operation it intend to carry out. Having to optimize many factors simultaneously makes scheduling a complex job. Operations scheduling in jobbing and batch production (intermittent systems) is different from that in mass and process production (repetitive production). Separate processes that can produce a wide range of items either individually or in batches characterize Job shops. Managers have to focus their attention on these processes and on the orders that have to be moved through them. The job shop has the highest variety and the more ad hoc procedure.

One particular scheduling problem is called the m x n **machine-scheduling problem,** *where m is the number of machines and n is the number of jobs. The m x n machine-scheduling problem has been solved for m = 1, 2 and arbitrary values of n. However, Johnson's rule for two stations it*

is designed to minimize both processing and idle time. Efficient optimal algorithms have not been developed for m = 3 because of the extremely large number of possible sequences.

Although Johnson's sequencing rules has a great deal of theoretical interest, it has not been applied much in practice. This is because real sequencing problems involve a great deal of variability in processing times, multiple objectives, and other complicating factors. Nevertheless, the rule is useful for gaining insight into scheduling problems and for suggesting approaches that might be of value in practice.

MANAGING CHANGE - THE PEOPLE DIMENSION OF CHANGE

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Abstract: *Our paper is an overview of change management, pointing out a few things about its history. We also draw a distinction between the organizational and the individual change management focusing on the people dimension. As changes in organizations have become more frequent and a necessity for survival, we consider that change management is essential for every business organization. Failing to manage the human side of change results in inefficient and unsuccessful change projects and an inability to realize new business strategies and objectives.*

Change management along the history

Change management is the application of many different ideas from the engineering, business and psychology fields. But during the years the tem 'change management' has developed and now it encompasses more skills and knowledge from each of these fields of study than before.

Since Frederick Taylor's work in the late 19th century, we understood change management as making changes to the operations of a business seen as a mechanical system. The managers focused on observable, measurable business elements that can be changed or improved, including business strategy, processes, systems, organizational structures and job roles.

The change can be progressive as in the continuous process improvement methods such as Total Quality Management, or radical, as in business process reengineering – which started with Michael Hammer's book *Reengineering the Corporation* by Michael Hammer in the 1990's.

The psychologists were concerned about how humans react to their environment and how an individual thinks and behaves in a particular situation. As humans are often exposed to change, many thinkers have studied how they react to change.

Contributions from both the engineering and psychology fields are producing a convergence of thought that is crucial for successful design and implementation of business change. In other words, a business must constantly examine its performance, strategy, processes and systems to understand what changes need to be made. Increasing external and internal factors have made this strategy essential for survival. However, an organization must also understand the implications of a new business change on its employees that ultimately execute the new day-to-day activities and make the new processes and systems come to life in the business.

In the 60's, the values of control, consistency and predictability created an environment where change was simply a plan to implement or an adjustment to a mechanical system. Although helpful, change management was not a required competency in this environment.

Time passed and business improvement initiatives – including Edward Deming's teachings post World –War II, the earliest quality circles from Toyota, Six Sigma from Motorola, Total Quality Management (TQM) from AT & T and Ford, empowered teams, and many others initiatives – came to the forefront. Business leaders embraced, if at least for some period of time, one or more of these business initiatives.

A new culture has evolved in many of today's businesses where a new generation of employees:

- Take ownership and responsibility for their work (accountability);
- Have pride in workmanship and look to improve their work processes;
- Feel empowered to make decisions that improve their product and the level of customer service.

With the introduction of these new values, employee resistance to change should be expected. So, failing to manage the human side of change results in inefficient and unsuccessful change projects and an inability to realize new business strategies and objectives.

Different perspectives on change management

Change management can be viewed from two perspectives – from those implementing the change and from the recipients of change.

The managers' perspective on change is results oriented. They are very aware of the business issues facing the organization and are accountable for the financial performance of the company. In many cases, executives or senior business leaders must weigh the return on investment of this change as compared to other strategic initiatives in the company.

Front-line employees do not have a day-to-day view of the business issues. Day-to-day operations are their focus. Serving customers, processing orders, getting the job done – these are the primary areas of interest. When changes are made, many employees lack the broader context or knowledge base of why the change is being made. They also do not share the same accountability as managers. They question, therefore, how the change will impact them personally.

Even more, the ***consultant*** or ***project team***, who is responsible to design and implement the change, has its own agenda acting on behalf of the business leaders who charted the change. The result is a potentially dangerous mix of different priorities, different knowledge sets and different driving forces. If the change is not managed properly, these different values and driving forces clash resulting in unfortunate outcomes for the business:

- Employees resist the change;
- Valued personnel leave the organization;
- Critical projects are delayed;
- Customers feel the impact indirectly through upset employees;
- Productivity declines.

So, change management must start at the beginning of the project and be integrated into all facets. Both perspectives of change management must be addressed: the managers and the employees.

Jeff Hiatt, author of *Employee's Survival Guide to Change*, says, "change management is the effective management of a business change such that executive leaders, managers and front line employees work in concert to successfully implement the needed process, technology or organizational changes".

The goal of management is to implement these business changes quickly to:

- Minimize the impact on productivity;
- Avoid unnecessary turnover or loss of valued employees;
- Eliminate any adverse impact on your customers;
- Achieve the desired business outcomes as soon as possible.

Organizational change management

Organizational change management is the management of change from the perspective of a manager or project team. It is the perspective of *business leadership* from the *top* looking down into the organization. The focus is around broad change management practices and skills that will help the organization understand, accept and support the needed business change. The primary focus is

around change management strategies, communication plans and training programs. The involved parties include project team members, human resources and key business leaders that sponsor the change.

For organizational change management there is a need to build knowledge and abilities in the following areas:

- Change management team structures;

- Change management roles;

- Critical barriers to implementing change;

- Change management planning and strategies;

- Managing employee resistance;

- Organizational change management methodologies;

- Building executive sponsorship;

- Creating communication plans;

- Creating training and educational programs;

- Incentive and recognition programs.

Individual change management

Individual change management is the management of change from the perspective of the employees. They are the ones who ultimately must implement the change. The focus here is around the tools and techniques to help an employee transition through the change process. The primary concerns are the coaching required to help individuals understand their role and the decisions they make in the change process.

For individual change management there is a need to build knowledge in the following areas:

- Diagnosing resistance to change;

- Models for managing individual change;

- Decisions and consequences around supporting change that face employees;

- Coaching tools and techniques for helping employees navigate the change process;

- Activities and exercises for supervisors to use with their employees to manage change.

Two dimensions of change

Change happens on two dimensions: the business dimension and the people dimension (see fig. 1)
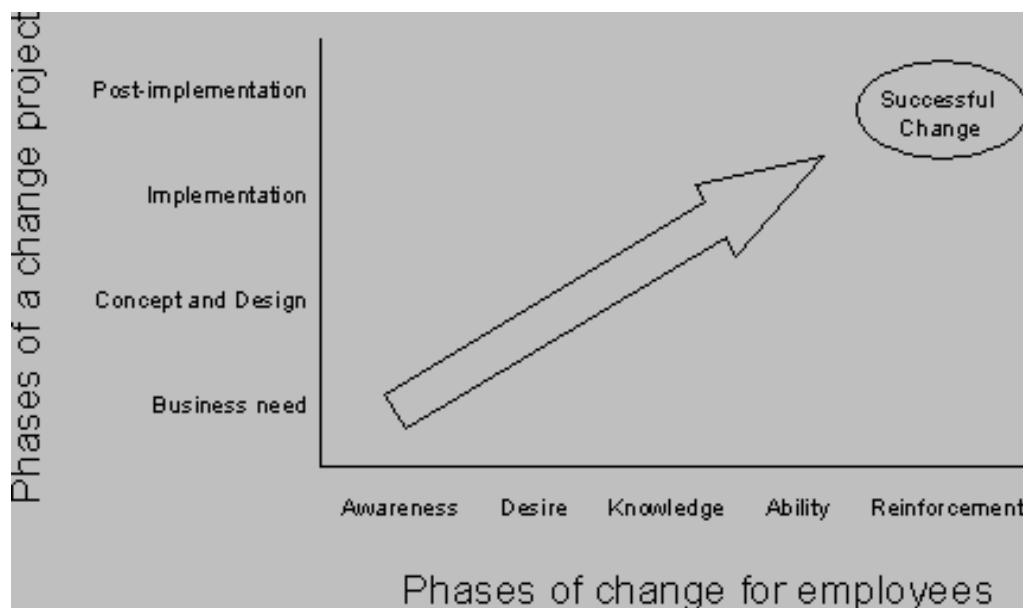
Source: *"ADKAR"* – *a model for change management*, Change Management Tutorial Series, PROSCI Change Management Learning Center 2004 (www.change-management.com)

The business dimension of change includes the typical project elements:

- Business need or opportunity is identified;

- Project is defined (scope and objectives);

- Business solution is designed (new processes, systems and organizational structure);

- New processes and systems are developed;

- Solution is implemented into the organization.

The people dimension of change is how employees experience the change process. In a study with 248 companies, made by Prosci – Change Management Learning Center, effective change management with employees was listed as one of the top-three overall success factor for the project. Helping managers be effective sponsors of change was considered the most critical success factor overall.

Effective management of the people dimension of change requires managing five key phases that form the basis of the ADKAR model:

- **Awareness** of the need to change – lack of it will bring up resistance
- **Desire** to participate and support the change – negative or positive consequences
- **Knowledge** of how to change (and what the change looks like) – role models or training education
- **Ability** to implement the change on a day-to-day basis – it needs time and ongoing support & coaching
- **Reinforcement** to keep the change in place – rewards, positive encouragement

If we are deploying a major change in our organization then a critical step in change management is organizational *awareness* of the reason for change. *Desire* to change at the

employee level must be addressed as resistance will be a natural reaction to change. As the change moves into implementation, we will need to develop *knowledge* about the change and the *ability* to implement new skills and behaviors. Once the change is in place, we will need to *reinforce* the change to avoid moving backwards to old behaviors.

Conclusions:

Change management is a required competency in business today. The shift in the core values of employees to empowerment, and accountability has created a work force that will embrace change as long as they are part of the process.

So, how do we manage change? Fred Nickols answers that "we manage it pretty much the same way we would manage anything else of a turbulent, messy, chaotic nature. It is more a matter of leadership ability than management skill. The task of change management is to bring order to a messy situation, not pretend that it is already well organized and disciplined."

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INCREASING QUALITY OF DECISION USING INFORMATICAL PRODUCTS

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Abstract: *Economical informatics is the most spread component of informatics, with the greatest number of implementations as compared to other domains, in my opinion. As component of economical informatics, managerial informatics has a wider spreading. This is a consequence of the fact that data volume a manager gestions or consults is harder and harder to control without computer's help.*

What is actually the problem?

In decisional activity, quality depends on two requests that must be satisfied:

- to supply information necessary for the analysis of the deviations from target;
- to chose the proper decision from the various possibilities, according to the followed purpose;

The problem is how can we satisfy these demands with software products, or more exactly how can we increase quality of decision, using software products, especially in the obvious situation of Romanian economy ? I underlined Romanian economy because from this point of view too, our economy, in its long transition period, has to clarify what should be done and also how?

Paper's objective

The paper wishes to identify a problem whose solving would open ways and means to increase quality of the decisional act, by informatical means.

I analyze the problem in two ways:

Part I: Organizational Development:

Step 1: we see where we are

Step 2: we decide towards where we want to go

Step 3: we show what we have to do

Part II: a SWOT analysis

Step 1: analysis of strengths

Step 2: analysis of weaknesses

Step 3: analysis of opportunities

Step 4: analysis of threats.

PART I: Organizational Development (OD), a strategy for major changes:

Step 1: Where do we stand?

Managerial Informatics is that part of it is used in the decisional process at different hierarchical levels. As compared to regular characteristics of economical Informatics, managerial Informatics operates with aggregated pieces of information at different levels of synthesis. These pieces of information can indicate phenomena, tendencies, characteristics, causes and effects that could be extremely important for the organization's management, for the internal climate of it or for concurrence. Due to these special characteristics, informatical processes for organization's management has to respect some specific requests. I identified few of these characteristics:

Typical requests for managerial informatics:

1. information should refer to the process in development

2. information should be relevant for management

3. work with data has to be very exact and accurate

4. algorithms, processing methods, the way information is being presented have to be easy to understand for the managerial stuff

5. data has to be kept in the form it had been processed to ensure modulation, simulation, self-teaching and artificial intelligence support

6. the circuit and security of data have to be well defined, ensured and controlled

Managerial Informatics contains the most important pieces of information a company has, necessary for the leaders in order to take decisions.

Efficiency of the leaders is reflected in the economical efficiency of the company, being a condition for it. Management supervises the evolution of the process in development according to the international system, analyzing deviations from the established objectives and taking measures

in order to reduce them. Lack of information – the base for the entire informatical system leads to the impossibility to take right decisions. Efficiency of the leaders is, undoubtedly influenced by the nature of the information used and by its quality.

A personal point of view:

In my opinion, pieces of information used in the decisional process are of two kinds:

1. **quantity information,** which measures in various ways the grade of accomplishments and deviations from the established target.

2. **quality information**, multiples positive effects of the decision, defining more variants and choosing from these the most beneficial for the accomplishment of the established objective

As the basic information for a decision has been delimitated into two parts, specific software products can also be delimitated in the same manner. Managerial informatics can be regarded as having two components: quantity and quality components

Quantity component contains all techniques, programs and equipment that contribute to the increase of the quantity and quality used as a decisional support.

From the quantity component are part all informatical applications or gestion systems, financial sphere, economical gestion sphere, operative or even statistical evidence. Informatical products in this category influence the quality of the decisional act through the quality of the information and reports they offer to management.

These software products deal with high volume data and are used in repetitive cycles of high frequency.

The quality component contains all techniques, programs and equipment that contribute to the increase of the quality and efficiency of decisional act, creating decisional variants for a proper use of resources and choosing from these the one that fits best to the followed objective.

I consider that quality component contains all informatical applications and systems that implement mathematical methods at decisional level also methods and algorithms of operational researches category. These informatical products influence quality of decisional act allocating in a proper manner resources and mathematically correlating the decisional variant and the established objective.

Analyzing economical and financial effects that managerial Informatics' components produce upon companies' results, I think that "Pareto's law" (Vilfredo Pareto (1848-1923)-sociologist and economist), can make a correct appreciation of the balance between projection of effort/implementation and the obtained effects. More specific this law would be formulated like this: 80% of the effort used in order to produce and implement programs in the quantity component of software products, can produce 20% of the effects, meanwhile, for the quality component of

<u>software products for management, 20% of the effort can produce 80% of the effects.</u> In figure number 1 this idea is graphically reflected. We could explain these in the case of a construction company too:

- implementation of a preferment financial system needs big resources (will note this with R) and has few effects upon economical results of the company (will mark this with E). This system ensures a proper wave of information for management so that its quality increases. All in all, the effect of every managerial measure is reflected in value and money (supplementary profit). Based on the above reasoning , economical effect produced would be E=R/4.

- implementation of a leading system based on projects concerning papers' programs for a proper use of resources brings the followings effects: the exact definition of tasks and adequate motivation for employees; exact decision upon necessary resources and terms for every project (objective) and phase; use of all resources in all steps, elaboration of a supplying program with the minimum from the stock, respecting the terms to hand in the papers to the clients, operative reallocation of the resources in case program errors occur, etc.

Based on the above reasoning, economical effect that this system produces would be E=4R, where R is the use of resources for projection/implementation.
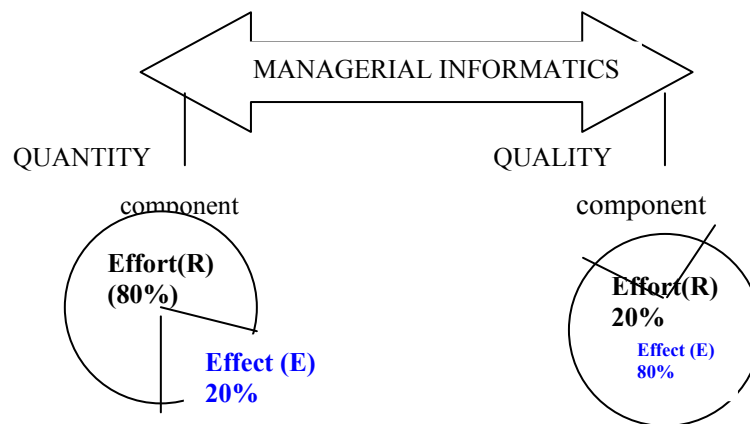

Figure number 1- the balance Effort(R)/Effect(E), according to "Pareto's law"

Despite what I said above, my idea wasn't to diminish the role and necessity to implement informatical products of economical gestation, but only to emphasize the huge amount of resources created by the implementation of the models belonging to operational researches sphere in management's.

I consider this a special modality to increase competition among Romanian companies, emerging economical effects produced by decision in the companies' activities.

Due to the invasion of personal computers (so-called PCs) on our market, after the 90's, took place a revolution of the entire informatics, with consequent benefits, that can be the topic of a separate analysis. In what concerns our problem it is important to realize that in this period economical gestion systems (economical administration, salaries, employees, etc.), recording results systems (gestion of stocked products and of services) and clients', suppliers', sells' administration developed mostly.

In our country, in mot cases, managers in almost all levels use informatics as a source of information. They consult different reports or analyze situations obtained through quantity data elaboration used as a base for decisions. These pieces of information are gathered in different ways:

-   systematic access on the INTERNET;
-   use of internal computer networks (INTANET)
-   use of program packages or informatics systems for the gestion
-   use of specific board spreadsheets

All I said above are considered very good things, sometimes this way of taking decisions is used in 80-90% of the cases. Extraordinary, only that decisions taken according to this information don't lead to the improvement of conducted systems, but to their guiding towards the accomplishment of the task. This is realized with an improper consume of resources.

I think I have already answered the question "where are we?" along with the image of the clock after twelve.

Step 2: What do we want to accomplish?

As the economical effects that the implementation of informatical products can produce from the quality component is about 16 time bigger (from R/4 to 4R) it is obvious that we have to find means, methods and necessary resources for the implementation of this component of managerial informatics too.

As a middle time objective would be equalizing the balance between two components in what concerns the use of informatical applications in the decisional process. If we manage to do this we'll be heading towards relaxation in the activity of taking decisions, less time to gather information and analyze data, less stress, more free time (even for golf , if we take a look at the symbolic image)

Step 3: What is to be done to reach the target?

To define what should actually be done we'll have to underline several steps:

⇒ we analyze the problematic area from the quality component zone

⇒ we specify ways and models for the solving

⇒ we study the situation on the international market

⇒ we decide upon the action methods

Specialized literature identifies usually the following senses of action that are considered the most important in the quality component sphere of managerial informatics:

1. introducing leading based on projects

2. proper schedule of activities: PERT method, critical way

3. reducing costs using proper resources: improvement of stocks, transport, networks, multi-criteria, mathematical modulations, enterprising games, simulations, etc.

4. reducing decisional effort using informatics

POSSIBILITIES TO IMPLEMENT QUALITY COMPONENTS:

Companies' managers with private capital are searching for means to increase performance and activities they are dealing with. Hardly do managers invest in any component of informatics whose effect can not be predicted as sure. They can not make requests, won't assume the risk to allocate resources, first of all because most of them don't have basic knowledge in this domain.

Specialists in informatics offer a small range programs in this category, and when they do it, their prices are very high.

Which can be the solution?

In the given condition, I identified the following solutions:

1. to organize courses (even post - universitary) to present program packages from this domain.

2. to simulate assimilation and promotion of these informatical products, by the effort of specialized companies.

3. to give money from the budget in order to have a detailed study of these products in specialized schools: informatical colleges, economical sciences, management and engineering.

4. to contact supply companies in order to identify ways of promoting these informatical products.

I consider that all the ways to promote the implementation of these products will be successful as long as specialists in informatics will unite forces with economists' and managers' solutions. In fact, this is what the image near the question suggests.

Part II: SWOT analysis (strengths, weaknesses, opportunities, threats)

If we start from the necessity to implement informatical products from quality components, meaning those that deal with models of operational researches, we can analyze this using the technique known as " SWOT analysis".

This technique is about analyzing and clarifying for aspects concerning weaknesses, strengths, opportunities and threats. Figure 2 presents the essential elements of SWOT analysis [1].

Step 1: **Analysis of strengths**

By " strengths " we understand those aspects of the analyzed problem that give superiority to it. Among our problems' strengths I identified the followings:

- a very good balance between effort and performance (from R/4 to 4R)
- increase of the probability to take correct and proper decisions
- less stress caused by the decisional act
- less work volume
- opportunity to rebuild forces in free time, bigger trust in the decisional act

STRENGHTS	**WEAKNESSES**
OPPORTUNITIES	**THREATS**

Fig. 2: Elements of SWOT analysis

Step 2: Analysis of weaknesses

By "weaknesses" we understand those negative aspects of the analyzed problem that can lead to measures that would raise performance, by analysis. Among weaknesses I identified the followings:

- lack of knowledge in the management's sphere
- informatical products from this category are harder accessible as products prepared for unprofessional users

- to be used they need minimal knowledge in operational researches and the use of computer.

Step 3: Analysis of opportunities

By opportunities we understand the necessity and advantages to implement such program products. Among opportunities I identified the followings:

- the use of informatics in project's management or improvement's is little talked about
- implementation of this program offers a chance of business at where informatics , management, lead processes meet
- effects that this implementation produce, can improve the balance between effort and effect, in favor of the second one.

Step 4: Analysis of threats

By threats we understand obstacles or dangers that stand in the solving of the analyzed problem. Among threats I identified the followings:

- an economical environment that doesn't work properly
- positive effects obtained with the help of these implementation can also be obtained by other means located at the edge between legal and illegal (auctions and prices above normal values, financial engineerings, use of black work forces)
- users', managers', specialists' fear of unknown
- because of the things mentioned above, implementation of these programs supposes taking risks and can determine performers' oppositions and resistance.

Some Conclusions:

1. I considered useful and necessary to present a personal point of view referring to the classification of informatical products from the managerial informatics sphere
2. for the analysis of the studied problems I used two recent methods of analysis, known in specialized literature: Organizational Development (OD)- for the implementation of changes and SWOT analysis- for problems' analysis
3. implementation of informatical products from the sphere of operation researches can influence positively the balance between the necessary effort and the effect produced.

4. There are premises and opportunities for the implementation of these informatical products.

5. teaching can have important tasks and responsibilities in this domain.

6. delimitation of program products from managerial informatics sphere in two groups, quantity and quality components offer the author the possibility to make a clear analysis of the balance between the effort necessary for implementation and the effects obtained.

7. the paper analyzes the discussed problem at global level but with clear methods, elements and conclusions.

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INCREASING EFFECTIVENESS THROUGH ELECTRONIC BRAINSTORMING

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Abstract: *There are several reasons why brainstorming sessions are not very effective: production blocking, evaluation anxiety, free riding. This paper shows that electronic brainstorming through anonymity, parallel entry of ideas, innovation, size of the group and proximity can overcome some of these barriers and can lead to more effective meetings.*

No good idea should ever be lost!

Everyone has thousands of good ideas within them just waiting to come out. The problem is creating an environment where those ideas can come out without feeling the fear of making mistakes.

In raw nature, mistakes can mean injury, dying, or being eaten by predators. In the human jungle, mistakes usually lead to mental pain rather than physical pain. And yet mental pain can seem much more frightening to many people than the fear of physical pain. The fear of making mistakes at work can be the greatest fear of all because it can lead to the destruction of an individual's vision of their future. Some people see the smallest of mistakes at work leading to lack of promotion, reduced salary, and even unemployment - and all of the social problems associated with this. And now you put these people in a room and tell them to put forward crazy ideas that may not work!

Brainstorming is a method for developing creative solutions to problems. Since its birth in 1941, brainstorming has spread throughout the world. The technique is known to most educated managers but, sadly, is often applied inefficiently because of poor training and lack of access to quality training material.

Brainstorming works in a freethinking environment by focusing on a problem. Using a set of specific rules and techniques, which remove inhibitions, people are encouraged to think more freely and build on the ideas raised by others. Only when the brainstorming session is over, the ideas are evaluated. Out of the many ideas suggested there would always be some of great value.

There are several reasons why traditional brainstorming may not be very effective:

1. *Production blocking.* Only one member of the group can communicate at a given moment so participants have to compete for time to speak; the result is that waiting members may forget or suppress their ideas, thus blocking their "production". While they listen, they may think of relevant ideas but by the time it is their turn to contribute, the ideas may be forgotten. However, these unexpressed ideas - if they would have been offered - might have stimulated someone else to build upon them, perhaps leading to a better solution to the problem.

2. *Evaluation apprehension.* One of the main reasons why some individuals may withhold ideas is because of the fear that others will criticize it, or criticize them for forwarding the idea. While criticism is not allowed in a brainstorming session, unspoken-criticism it may occur after the meeting among participants. Also, a lower-level participant may feel uncomfortable speaking out on an idea that he or she believes the supervisor would not support, or an idea that may be openly ridiculed after the meeting. Higher-ranking members often dominate the meeting in comparison with lower-ranking members and there is of course the pressure on the lower ranking member to conform to higher-ranking members viewpoint.

3. *Free riding.* Individuals have a tendency to put less effort into a group project than they would if they were working independently. For instance, some people feel more comfortable offering an idea only after they have had the time to think it through. Meetings usually have the pressure of time, as a result, certain ideas, thought up during the meeting, will not be helpful.

3. Size. Group size seems to be a limiting factor. There is a limit to how many people can effectively work in a group. The more people in a group, the less of a chance there is for each member to speak because the members have to wait their turns in traditional brainstorming sessions. In addition, meeting schedules are constantly rearranged owing to conflicts in schedules among the members.

It is well known that managers spend from 30 to 80 % of their time in meetings; half of that time is considered to be useless. Electronic brainstorming (EBS) can change the behavior of the group, improve effectiveness of meetings and overcome some of the above-mentioned barriers. Organizations should look at EBS as a means to enhance the quality and quantity of ideas and as a way to reduce time spent in traditional meetings.

Electronic brainstorming is a new technique compared with traditional brainstorming, which reduce problems associated with group work. Specifically, EBS gives participants the opportunity to silently and anonymously gather ideas efficiently on a specific question or issue by typing them into a computer, which quickly displays them on everyone's monitor. There is no need to wait for your turn because the technology eliminates the problem of "talking over one another." Idea generation continues until the group has exhausted all of its ideas. A brainstorming software allows the ideas that were generated in the meeting to be recorded for later use, helps reduce redundant ideas, provides participants with periodic feedback about the number and types of ideas and assists the team with the discussion and consolidation of its ideas.

With regard to whether EBS can improve group effectiveness, the answer is yes. Investigations that have been conducted show that electronic brainstorming groups generate more ideas than do verbal brainstorming groups, particularly for larger group sizes, it speeds up the meeting process at which it is used, increases productivity, and allows the focus to remain on the ideas rather than on the people who generate them. EBS can improve group work because it allows members to work simultaneously.

Through an examination of the process gains and losses inherent to different brainstorming approaches, researchers conclude that the process gain versus the process loss advantages of electronic brainstorming technologies may not be large enough to enable electronic brainstorming groups to outperform nominal groups. Electronic brainstorming is not superior in all circumstances, but it has consistently performed better than traditional brainstorming when the number of participants is large. Studies performed demonstrate that the electronic brainstorming groups of nine or larger consistently outperform the verbal brainstorming groups.

There are many reasons for management to consider whether their company should institute the use of electronic brainstorming.

1. *Proximity.* Many times, it's difficult to set up a meeting. One or more of the desired participants may not be able to attend. Using EBS group members do not need to be present in the same place as long as they have computer-linked workstations and the appropriate software. When a creativity session involves people from various sites and localities, the electronic mechanism becomes even more valuable as it eliminates travel time and expense. Furthermore, the time spent in the meeting is clearly reduced.

2. *Anonymity:* The non-face-to-face environment allows everyone to focus more on the creativity task at hand, and less on the personal and social aspects of interaction. The anonymity shields them from personal comments; comments are directed at ideas and not at the persons voicing them. "Half-baked ideas don't get laughed at. They become catalysts for discussion, and

people take them and run with them. It's unique." The ideas, by themselves, are considered more important than the person who stated them. Anonymity eliminates evaluation apprehension. Anonymity encourages a more open and honest environment. It seems that, with anonymity, group members will generate more analytical comments than they would in traditional groups. Anonymity it is important, particularly in cases where there is a power and status difference in the group. In a research that studied 800 people, productivity ranged from 25 to 50 per cent for four-person groups and to about 200 per cent for 12-person groups. The same research showed that the quality of ideas generated with EBS was higher than that in traditional brainstorming groups.

3. *Equality* With EBS, no individual can dominate another person through rank, status, or raised voice to exercise power. Since members can input ideas at the same time, no individual can dominate an EBS session. This is a way to ensure equality to the participants. Lower level individuals, who may not be respected because of their jobs or minority status and normally not given a voice, become, enabled to voice their opinions with this technology. Since everyone feels equal and can suggest their ideas, the quantity of ideas may be increased and the variety of suggestions enhanced. With equality, when all hierarchical levels are involved in the decision-making, the group may get quicker approval for decisions. Equality among members tends to reduce feelings of guilt and embarrassment. When members feel more equal, they may be more efficient.

4. *Parallel entry of ideas. S*ince all participants enter work at the same time, individuals can immediately generate ideas without interrupting anyone. The participants are able to enter ideas at any time. EBS renders all the participants an equal opportunity to express their views and ideas. Because EBS members feel that they can express their thoughts freely, and there is no need to suppress their feelings, upper management can obtain more ideas than in the regular meeting sessions. In this way, there is more equality. In addition EBS may allow meetings to take half the time or less time than they used to take without the electronic aids.

5. *Size*: The size of the group affects the structure of the session: smaller groups (seven or fewer individuals) tend to complete tasks more quickly and reduce the potential for group domination or social loafing; on the other hand, larger groups (twelve or more individuals) are better problem solvers and idea generators because there are more individuals thinking.

Sometimes the number of participants is restricted by the size of the room. When planning face-to-face meetings, there's always a tendency to keep the group to a reasonable size by eliminating some people. However such "outsiders" often make major contributions and bring new insights. When it comes to the size of the group, EBS has no limit. It can easily accommodate brainstorming meetings of groups of 12 members or more. When the group is larger, more people

from different levels of the organization may participate. As more levels are presented in the decision-making, more of the entire organization becomes involved. Thus, there is a contribution to the meeting from a wider experience, knowledge, and skills "bank". In comparison, traditional brainstorming works best with groups of only five to 12 members.

6. *Novelty:* EBS is considered by most to be a new technology. In any case, because it is a novel mechanism, it tends to generate interest and curiosity. It has been found that peoples who apply EBS develop a sense of achievement with it. The members frequently work harder and produce more ideas because it seems there is more participation within the group. Information is processed faster using EBS than with verbal information channels. Individuals seem to be more concise when working with the keyboard than when talking or writing.

7. *Ideas can be recorded for future sessions.* Suppose all members cannot meet at the same time, but they would still like to know what had occurred in a meeting. With EBS, they have the option of "viewing" the session. Since the session messages are automatically saved, the group no longer needs to use a person to write down a singular version of the result of the meeting. The result is more accurate records than were available previously when other means of brainstorming were used. In traditional brainstorming ideas often got unused because they cannot be retrieved easily. Members who cannot attend a meeting and who still need to be informed of what had occurred in the meeting, can do so with this technology.

Of course, there are disadvantages to electronic brainstorming. One of the most obvious is the loss of social interaction; while face-to-face teams are often less efficient, the nonverbal signs present in such settings help build trust and collegiality among team members. Because electronic brainstorming allows for idea generation and sharing in an anonymous environment, individuals may not receive the credit they feel they are due. Consequently, some group members will feel that there is no motivation to participate.

The study of electronic brainstorming has reached a crossroad: there is a reasonably large body of often-positive research that shows clear benefits from use, and yet adoption by practitioners has been minimal. Most of the researchers have focused primarily on the number of ideas generated. But is the number of ideas the primary concern of the individuals in a brainstorming session? Perhaps other outcomes are equally, if not more, important.

The evidence is conclusive that verbal brainstorming is the least effective technique for generating ideas. However, despite all of the evidence pointing to the disadvantages of verbal brainstorming, it is still more widely used. One immediately plausible possibility is that verbal brainstorming is used because it is less expensive than electronic brainstorming. After all, electronic brainstorming requires the use of computer hardware and software that may not be available to

participants without the purchase of additional hardware and software. In addition, there are the setup and configuration costs of the software and hardware to support these activities. An alternative for small companies may be to lease time from organizations that have EBS already installed for applicable situations in which larger groups may be involved.

Unlike verbal brainstorming, electronic brainstorming cannot "just happen;" the infrastructure must be in place first and the users must be familiar with its operation. Thus, we must look more deeply.

One widely used theory that examines the adoption of technology (Technology Acceptance Model) argues that the adoption of a new technology - or a new technique - depends upon the perceived ease-of-use and the perceived usefulness of the technology or technique. While it is plausible that verbal brainstorming could be perceived as easier to use than electronic brainstorming, it is hard to believe that ease-of-use is the primary reason that verbal brainstorming is more popular than electronic brainstorming. This leaves us with the second possibility: perceived usefulness. Users perceive that nominal group brainstorming and electronic brainstorming are not as useful as verbal brainstorming. As it is noted above, overwhelming empirical evidence suggests that verbal brainstorming is not as effective as electronic brainstorming. While it is possible that the perceptions of participants are distorted so that they fail to believe that verbal brainstorming produces fewer ideas, is also possible that, to participants, perceived usefulness is not measured solely by the number of ideas produced; perceived usefulness includes other aspects that are at least as important as the number of ideas. In this event, the question becomes: what other outcomes are important to the users?

Groups are an important social structure in many organizations. When group members work together verbally, the group and its members have a strong ability to reinforce preferred behaviors and discourage less preferred behaviors. This includes the ability to use non-verbal cues to influence group behavior, which is significantly more difficult under the other methods. In electronic brainstorming, it is significantly more difficult to reinforce the group culture, particularly when contributions are anonymous. The ability for group members to socialize and develop relationships is also another important way in which members promote group well being. Participants in verbal brainstorming sometimes view the brainstorming sessions as "fun" and "a vacation" that provide a chance to relax with their co-workers, eat, and to apply a wide variety of skills and knowledge to the solution of extremely difficult problems. Electronic brainstorming reduces such socializing because it eliminates the interaction among group members. Although electronic brainstorming does provide interaction, it tends to be more task-oriented. Finally, culture and habitual norms may also play a key role in explaining why electronic brainstorming has not

been widely adopted. In many organizations today, the culture for group interaction is inherently verbal; meetings are driven by the spoken word, not the written or typed word. While culture is changeable, it often constrains action in the near term. Thus this reinforcement of existing culture may be a constraint on the adoption of new techniques such as electronic brainstorming. As organizations move to adopt the Internet and virtual teams become more common, we may see a shift in culture and norms, so that electronic interaction becomes more routinized, and the use of electronic brainstorming no longer seems alien.

With regard to the future, electronic brainstorming has just begun to penetrate organizations. We are entering a world where we depend on technological resources. EBS allows participants to work simultaneously, without being criticized, discourages anyone from dominating the meeting, does not require real time interactions, provides an equal opportunity for everyone to participate, allows no-limits group size and helps in recording ideas for future sessions. As more businesses realize the potential of electronic brainstorming, its popularity will rise.

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SERVICE MANAGEMENT – A GENDER APROACH

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Abstract: *Appreciating diversity is considered the next phase in academic development and human resources practices but living this out in practice is a permanent challenge. Research in the area of gender, as a dimension of diversity, is revealing new facets, becoming more complex and gaining new forms. Debates about gender-related issues are played out continually on a socially based discussion, and recently, with concerns on power, management, leadership, politics etc.*

In this paper I present some aspects of the gender-related debates with connection to general management studies and service management in particular.

The term „gender" is gaining popularity. Once, its meaning was assumed to be relatively clear: it was used to refer to the social expectations and roles attributed to or experienced by people based on their biological sex. Now gender is taking on a much broader and diffuse set of meanings, becoming a general label for talking about women, men, the relationships between them, related aspects of organizing, processes through which gender differentiated behaviour patterns are enacted, and associated issues of power distribution. It encourages potentially non-partisan analyses, although the emphasis of researches is still on women.

There is a general consensus on the issue that today both masculine and feminine approach to leadership is equal in efficiency. To make stronger statements, „knowing that a particular individual is female or male would not be a reliable indicator of the person's leadership style"[1].

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[1] Vecchio R., *In Search of Leadership Advantage*, The Leadership Quarterly 14 (2003), p.847;

Claims of „gender advantage" made by different scholars or journalists are often critiqued for their lack of objectivity and lack of empirical rigor.[2]

Yet, there are a number of characteristics that are increasing in the importance to the future success of organizations and their leaders. These characteristics are: concern for people, interpersonal skills, intuitive management and creative problem solving.

There appears to be evidence that leadership talent is in short supply and becoming more critical every day. Yet a potential source of creativity and talent that could fill this voids remains dramatically untapped – namely women.

There is a controversial issue that concerns the organizational life, whether men and women have different leadership styles. Many researchers argue that women have certain traits and behaviors that conduct them to a relations-oriented leadership, which means that women leaders exhibit a cooperative, empowering style[3]. From the same perspective, men are inclined toward command-and-control, militaristic leadership style. Women find participative management more natural than do men because they feel more comfortable interacting with people. Furthermore, it is argued that women's natural sensitivity to people gives them an advantage over men in encouraging group members to participate in decision making.

This perspective shows that women managers may be better prepared to use these tools of decision making than their male counterparts. Perhaps the most significant premise on which the feminine leadership concept rests is the legitimacy accorded to emotional as well as rational approach. Marilyn Loden, in her book *Feminine Leadership: or How to Succeed in Business without Being One of the Boys*[4] argued that feminine leaders "see the world through two different lenses concurrently and, as a result, respond to situations on both the thinking and the feeling levels".

The same idea is emerging from a psychological research (2001), which investigated the relationship between the leadership style (human relations oriented and task oriented leadership style) and the Psychological Type, in order to anticipate the most frequent managerial type in case of women and men (as managers) and also the relations between the dimensions of these types and the leadership style[5]. The research (which includes 60 subjects, Romanian women and men managers) found a relative balanced leadership style exerted by women (a more complex and complete one, with both relations-oriented and task-oriented behaviors), compared with men's style,

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[2] Marshal J., *Gender and Management. A Critical Review of Research*, British Journal of Management, 1995, 6, S53-S62;

[3] Paloş R., *Diversitatea în organizaţii: tineri, vârstnici, femei, persoane cu nevoi speciale*, în Manual de psihologia muncii şi organizaţională, Editura Polirom, 2004, p.304;

[4] Loden Marilyn, *Feminine Leadershiop: Or how to Succeed in Business Without Being One of the Boys*, Times Books, New York, 1985;

[5] Mihai Alice, *Relaţia dintre leadership şi personalitate din perspectiva psihologiei organizaţionale*, Revista de psihologie organizaţională, vol.I, nr.2, aprilie-iunie 2001, p.61-71.

which is exclusively task-oriented one (according to the mentioned study). The balanced style of women managers is found to be determined by the intern pattern of the personality structure, which allows a bidimensional orientation of the subject in a management situation.

On the other hand, many researchers concluded that there are apparently few, if any, personality or behavioral differences between men and women managers. This is partially the result of the fact that yet as women move up to corporate ladder, their identification with the male model of managerial success becomes important; sometimes they consequently reject even the few managerial feminine traits they may have earlier.

Whether male and female differences in leadership style do exist, they must be placed in proper perspective. Both men and women leaders differ among themselves in leadership style. "There are many more differences among members of the same sex than between men and women in general" (Papalexandris, Bourantas, 1989). Accordingly, plenty of male leaders are relations-oriented, and plenty of women practice command and control (the extreme task orientation). A new term emerged to describe this situation – the *androgynous* leadership (Berdahl, 1996), which is neither masculine nor feminine. It is based on personality traits and it is considered "healthier, since it is most flexible to respond in appropriate ways across a variety of contexts"[6]

Considering the fact that leadership is situational, there isn't a most effective or best leadership style. The leader examines certain forces to determine which style best fits the situation. The most effective leaders, men or women, appear to have high degree of versatility and flexibility that enables them to adapt their behavior to the changing and contradictory demands made on them.

There remains however a major problem of low representation of women at the top level of the management scales. The ratio for women managers seems to be lower as we move higher up in the hierarchy and this is the situation even for particular industries (e.g. services), employing a large number of women (banks, health services, personnel departments), where the percentage of managerial positions held by men are disproportionately high.

There are many explanations for the weak representation of women in power positions that makes the subject for different kind of researches: in sociology, anthropology, law, psychology and so on. But from the management point of view, probably one of a woman's most important obstacle is her own doubts about her ability and competence. Women do not necessarily have a lower achievement need, nor do they lack the desire to achieve – but their achievements gets channeled in socially acceptable ways.

Service management in a complex environment

Until recently, there were some rules well defined regarding the business's success. Those rules were established by analyzing a great number of entrepreneurs, business individuals, most of them men. The new century brings into the light a real explosive growth of the number of business lead by women, in a diverse and turbulent environment. For management this means some changing aspects: from control to self-control; from individual achievements to team leading for success; from decision making only to motivating actions and decisions; from using power influence to limitation of power in leading.

The feminine leadership approach seams to be more appropriate for those new accents, due to the marriage of rational and intuitive problem solving style, compared with the masculine model which relies on a rational view of the world. The area where feminine leaders may excel is the service sector, because the most important skills requested in services is the concern for the others, the capacity for expressing feelings, developing a personal rapport with customers through empathy, sensitivity and willingness to expose them emotionally.

Either a result of evolution or because they have a lot more things to do at the same time than men, there appears that women think in a more complex, multidimensional way. A woman manager has to cope with professional and domestic problems using an impartial manner so that anyone has to suffer. This certainly implies a lot of creativity for managing time effectively.

For some time it has been recognized that managers from a wide variety of industries are rethinking performance measurement systems. This process – which includes the development of a range of new performance measurement frameworks – is focused on enabling organizations to more effectively meet the sophisticated, changing demands and challenges of their competitive environment.

In service industry measuring performance is a permanent challenge for managers because it has to do with customer satisfaction. This implies a more sensitive approach and instruments for an accurate result of the satisfaction evaluation. The dimensions take into account for measuring services performance usually are as shown in table 1.

It is well-known that many service organizations place an emphasis on financial and past oriented dimensions instead of toward determinants of future success as the most valuable criteria for satisfaction.

To the extent that women are overrepresented in the service industries, there is a gendered aspect to such exploitation to which women are disproportionately subject.

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[6] Bem, S.L., *Gender Schema Theory and the Romantic Tradition* (1987), în Berdahl J., *Gender and Leadership in*

Table 1. The Dimensions of Service Performance

Performance dimensions	Types of measures
Competitiveness	Relative market share and position Sales growth Measures of the customer base
Financial performance	Profitability Liquidity Capital structure Market ratios
Quality of service	Reliability/Responsiveness Aesthetics/appearance Cleanliness/tidiness Comfort Friendliness Communication, Courtesy, Competence Access, Availability, Security
Flexibility	Volume flexibility Delivery speed flexibility Specification flexibility
Resource utilization	Productivity Efficiency
Innovation	Performance of the innovation process Performance of individual innovators

Source: Fitzgerald et al. (1991) in Fitzimmons J., Fitzimmons M., Service Management for Competitive Advantage, McGRAW-HILL International Editions, 1994;

The dimensions of service quality, as shown above, are usually judged by customers and reflect the compared perceptions of service received with expectations of service desired. These dimensions – reliability, responsiveness, assurance, empathy and tangibles.

On the other hand, there are concepts that define a relationship between specific service activities and the gendered nature of the workplace. In her 1983 text, *The Managed Heart*, Arlie Russell Hochschild powerfully dissects the dynamics of emotional labor[7]. The contrast is between traditional, Marxist-inspired conception of labor and exploitation, according to which workers give

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Work Groups, 1996.
[7] Cranny-Francis et al., *Gender Studies. Terms and Debates,* Palgrave Macmillan, New York 2003, p.228;

their time and energy, but not necessarily their feelings, with the contemporary, less obvious, requirements of workers that they manage their feelings in the interests of the workplace which employs them. The management of the feelings requires stringent self-surveillance, and it comprises work, involving possible insidious exploitative elements.

Consequently, emotional labor is the work of controlling and managing feelings in the workplace. It may mean enhancing emotional expression or suppressing that expression, but in both cases is aimed at constructing a positive image of the company and maximizing company profit.

It is Hochschild's contribution in claiming about "the commercialization of human feeling", particularly because this is related to women. She speaks about a businessman who requested "a smile" from the female attendant of an American Airline Company. The association of women with caring and nurturance is persistent. Hochschild's achievement is to show the relationship between economic and emotional (hospitality) organizations, and the important role of gender in their constant interplay.

Measuring satisfaction in the service industry is a challenge because customer satisfaction is determined by many intangible factors. The quality often extends beyond the immediate encounter having an impact on the future quality of life of the customer.

The managers of a for-profit service organization have an interest in delivering service as efficiently as possible to remain price-competitive. Many successful service organizations have established a set of values and expectations that encourages their employees to focus on delivering exceptional services. They developed a specific culture by selecting and training contact personnel.

Conclusions.   Increasingly our work and private environments are characterized by diverse people, needs, demands and choices. Women are capable at managing such characteristically diverse environments because of their interaction with modern values, tolerance of differences, and questioning of social traditions.

Women's leadership is often invisible, because it is characterized by "behind the scene" activities, in contrast to highly visible action and personal promotion. Thus, a significant challenge for many women is to make their achievements visible, promote their values and seek recognition of such work.

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