

LEARNING IN SMALL AND MEDIUM ENTERPRISES (SMES) - TAKE TAIWANESE SMES AS EXAMPLES

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ABSTRACT

As organisational learning in small and medium enterprises (SMEs) has been attracted by the academics in recent years, the relevant topics of organisational learning in SMEs are becoming an important issue both in the research of organisational learning and the investigation of SMEs. According to the previous literatures, the quantitative research showed that there are different characters between family business and non-family business, however, the in-depth research is still not much.

In this paper, I discuss their different learning formation by comparing organisational learning in family-owned and non-family-owned SMEs. The initial investigation was conducted in five companies (two of them are family business). The analyses of these five cases are based on three themes: owner-managers, organisational culture and external relationship. The results show that the different organisational structure (family-owned and non-family own) may be result in the different formation of organisational learning. The findings of this pilot research have been discussed in this paper and it did need the further research for a more comprehensive conclusion. At the end, I also assume some relevant questions which may help the further discussion.

1 INTRODUCTION

According to the studies on the organisational learning that have been published in academic papers and business practice in decades, developments in the organisational learning have been built upon theories and propositions (Easterby-Smith, Burgoyne and Araujo, 1999). However, debates of learning within the organisations have been concentrated on larger companies (Thorpe et al., 2005; Hausman, 2004). Also most of the debates have been focused on the larger companies or association from major industrial countries (eg. US, Japan and Western Europe) (Huber 1991; Gherardi et al. 1998; Kidd 1998). The empirical research on organisational learning in transitional economies has not been done much (Cyr and Schneider, 1996; Tsui-Auch 2003). The applicability and situation of organisational and management learning perspectives to other institutional contexts and to other types of organisations remains to be explored (Tsui-Auch, 2003).

In Tsui-Auch (2003)'s paper, Hong-Kong, Singapore, South Korea and Taiwan were chosen as four important elements in Asian economy. With the rapid growth of China's economy, the special relationship between China and Taiwan has given Taiwan relatively better business opportunity than other countries (because of the same language, culture and history background). Several Taiwanese companies that operate good business in China have attracted certain researchers to investigate Taiwanese business (Tsui-Auch 2003; Lu

2006). In Lu's (2006) paper, he pointed out that Taiwanese business was attributed mainly to smaller firms at the beginning and small and medium enterprises (SMEs) have taken important positions in Taiwan's economic growth since 1980 (the period of economic boom). Taiwan, as a country that achieved its success from SMEs development, is considered to be an appropriate society to present the learning characters of SMEs in my current study.

In this report, the discussion will begin with the relevant literature review. The reviewed literature includes the literatures of organisational learning and learning in small and medium enterprises (SMEs). After the literature review, the analysis of the pilot study will be sketched out. The pilot research report contains the research insights and the findings from the pilot study. Finally, some further research possibilities and questions are mentioned in the end in order to show some routes of the future study.

2 LITERATURE REVIEW

2.1 Organisational Learning

The early literature on organisational learning was based on the ideas of organisational behaviours within the field of organisational structures, organisational strategy or organisational adaptation (Cyert and March 1973; Daft and Huber 1987). These studies indicated that organisational learning has a function to improve information communicating and to enhance the learning of the adaptation of the environment. In recent years, organisational learning has become a more versatile concept. Organisations, just like individuals, have the ability to demand new knowledge and improve their future performance by their existing experience (Argyris and Schön, 1996). A system thinking which was introduced by Senge (1990) gave a more comprehensive conception on organisational learning.

2.2 Learning in SMEs

In introducing learning and the use of knowledge in small and medium organisations, there are three elements needed to be taken into concern: individuals (owner-managers); internal routines; external networks. Firstly, the decision-making is heavily dependent on individual managers' judgement (Carson and Gilmore, 2001) and the knowledge of the owner-manger can influence the exploration and exploitation of the learning resources. Owner-mangers can influence the internal even external learning resources. Secondly, the internal routines that includes internal relationships, organisational culture, organisational trust and organisational atmosphere, can significantly affect the learning capability and the strategic learning approach. The social interaction in SMEs plays a crucial role in knowledge symmetry (Liao et al. 2003; Meeus et al. 2001). Finally, external network that may vary in different sectors is related to the external resources that could influence institutional knowledge improvement. The better external networks create the more appropriate learning opportunities. (Bell et al. 2004).

The following section will focus on the characteristics of Taiwanese SMEs, the definition of family business, the literatures of learning in SMEs and the relevant topics about learning in SMEs.

2.2.1 Taiwanese SMEs-

According to 2006 White Paper (issued by Small and Medium Enterprises Administration, Taiwan), the number of SMEs in Taiwan took over 90% of the total amount of whole business enterprises. In addition, small and medium-sized organisations in Taiwan are mostly family-owned. Tsui-Auch (2003) concluded family business as ‘these include a keen interest in retaining family ownership and control, an overlap of commercial goals and family goals, a protection of family interest over a pursuit of rationalistic business logic, and an adoption of a paternalistic and nepotistic approach in management (Donckels and Froehlich, 1991; Lansberg, 1988).’

2.2.2 The Definition of Family Business

The definition of family business is widely-ranged (Westhead and Cowling 1998; Sharma 2004; Howorth, Rose, Hamilton 2006). The definition of family business include one or several aspects, such as the percentage of the ownership, the percentage of family members that are involved in the senior management and power control, and multi-generation (Westhead and Cowling, 1998). In the early research, the definition was focused on the generational ownership (a company pass on its ownership and management to the next generation) and their internal relationship which was mainly based on the kinship (Ward, 1987; Channon, 1971; Gasson et al., 1988). In recent years, the definition was focused on the control of power. Cromie et al. (1995) and Reynolds (1995) both pointed out that if over 50% of the ownership of a company is controlled by one family and this family also takes majority of the senior management, then the company can be defined as a family business. However, according to Howorth, Rose and Hamilton’s (2006) research, the percentage (50%) might not be appropriate as their investigation was carried out in large family businesses. In large family business, even small percentage of family ownership (3-5%) can provide strong influence on the company. In my project, the research is focused on the small family business, in which, the limits of percentage (50%) will not be a matter.

In my project, in order to have a clear definition of family business, I use the Reynolds (1995: 8)’s definition which has clear figures for identifying the family business: family businesses where more than 50% of the ownership is owned by family or kin and 50% or more of family or kin are on the management team. Also, as my research is focused on the effect of owner-manager and the internal relationship, Reynolds’s definition that was based on the ownership and management control is relatively more suitable for my research topic than other definition of family business.

2.2.3 Learning in SMEs – effects, process and formation

In Thorpe et al. (2005) analysis, the literatures of knowledge that has been used in SMEs were systematically reviewed from three aspects. These three aspects, ‘Knowledge and Individuals’, ‘Knowledge and the Firm’ and ‘Knowledge and the Institutional and Policy Environment’, provided an initial route for identifying factors of learning in SMEs. In this project, according to the idea of Thorpe et al., my research approach on learning process in Taiwanese SMEs was divided into three elements. These three elements are ‘Owner-managers’, ‘Internal Routines’ and ‘External Networks’.

3 PILOT RESEARCH

A pilot research was conducted in the summer of 2006 in order to obtain some initial insights for the main research. It was a three-week research that involved five companies. Seventeen interviews across five institutions were carried out that provide a good opportunity for determining the researching themes of my main research, and also provide a better understanding of the current status of small and medium enterprises. In each company, the first interview was implemented with their owners who gave rough structures of the organisational management, the organisational history, the established background and their thoughts of organisational culture. With a general idea of the organisation that was obtained from the first interview, the further interviews were arranged in order to obtain more information in depth. The further interviews were conducted with the senior managers within the companies and line managers. In addition, some informal interviews were carried out during the visit of the factories.

The five companies are situated in different sectors. Three of them are family business and two of them are non-family business. The general information of these five companies is shown in Table 2.0.

- Table 2.0-

| | A | B | C | D | E |
|--------------|--|---|--|---|---|
| Sectors | Machinery & Solar Tech | Biotechnology | Plastic - Producing Machinery | Information Technology | Printing & Publishing |
| Background | This company manufactures Machinery products, such as Electronic Motors and Beach Motors. In 2001, the chairman of the company decided to establish Solar Tech for promoting green and renewable energy. | Established in 1999. The owner wanted to set up a company for his next generation. Starting with two professionals and the owner believes that only patent can help a biotech company going long and well | Established in 1962. According to the rapid development in plastic products, the owner built the company using his professional skills which was gained from his previous work experience. | Established in 2002, by a group of people from a bigger technology company. They adopt the management model of their former company but added in their own ideas in customer service. | Established in 1959. The company was only a publisher at the beginning, but now has its own printing factory. The company is now directed by the second generation from the family. |
| Main Product | Beach Motors and Solar Cells | Bio Sensor, Diagnostic Biochip and Bio - Medical products | Vent-type plastic pelletizing machine | Enterprise Internet Solution and other Technical service | Text Books and Reference Books printing and publishing |
| Key Issues | In 2001, according to the low interests of Machinery products, the owner decided to change the direction of the company. | Several products had been stocked because of some negative news for their products. | | At the beginning, they found out that different management model was needed for the branch in China, especially for the factory workers. | In 2002, the National Education Department announced a new policy for high school which involved giving |

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| | | | | | |
|-----------------------------|--|---|--|--------------------------------|--|
| | Therefore, he devoted in solar tech which continue his ideal – environmental protection. | | | | authorization of the edition of textbook to private institution. |
| Corresponding Policy | Set up a new factory and recruited new professionals. Slightly move main capital to the new products | Try to sell their stocks and keep improving their products. | | Set up a new management style. | Set up a editorial department in the capital city in order to gain the latest information and knowledge for textbooks. |

(The resources were collected by the interviews with their owners and managers)

Firm B, Firm C and Firm E are family business; Firm A and Firm D are non-Family business. This distinction was based on their ownership, management and the number of family members in the board of management. In order to have a broader range of research idea at the beginning, five different sectors from the skill-based industries were chosen for the interviews. Evidence came initially from interviews and was verified by examining company documents.

Owner-managers of family businesses demonstrated a certain degree of learning and were not committed to deeper change involving norms within the organisation or relationships with clients and suppliers. In contrast, non-family business used to accept new ideas by introducing new products, new skills and external relationships. Firm A and Firm C are the examples of this issue. The owner of Firm A, who is relatively aggressive on researching and improving their products, is keeping trying to explore the new market for the future business (As he found out that the Machinery Industry is not much benefit, he established the new factory of Solar Tech). On the contrary, the owner of Firm C, who is relatively conservative on searching for new products, is trying to keep their original products and maintain the long relationships with their clients.

However, in family business, employees tend to work in a company for a long time. Some employees even send their next generation to work for the same company. As I visited the factory of firm C, one of their managers said, 'I like working here, so I helped my son to get a job here. He is now a technical worker in this company and I have confidence that I can teach him to become a manager in this company one day.' The knowledge which is secured between colleagues may be transparent when they are relatives. Also in firm E, the reception girl said, 'we're just like a big family that we eat together and share things between us everyday. My father has been employed by this company for 20 years and he really loves this job and appreciates the boss who gave him good opportunities to do the job. So he wanted me to work here, he believed I can learn quite a lot from this company.' The boundaries between employees in family business seem to be less and this situation may enhance the trust between employees. The higher trust that has been established within the employees of the family-based business may help the construction of organisational memory.

Reversely, non-family business has relatively high turnover of personnel. Employees tend to seek for better opportunities after few years of working. One of the non-family business owner said, ‘even we have good system to save our knowledge and skills, it is still a problem to lose some excellent people. It is just like some good elements that have been taken out of this organisation and it is pretty hard to save it by any tool.’

To conclude, as modes of learning are based on organisational structures, systems, routines and cultures that facilitate and support organisational learning, investigation on learning process in family and non-family business is necessary. Based on their different characteristics, the research will generate a comparison between family business and non-family business on their learning process. A suggestion of which kind of business is more effective on organisational learning will then be given.

In addition, after this pilot research, two significant phenomena were taken into concern in my further study. One phenomenon was that the working routines, that included their internal relationships and external networks, vary from sector to sector. For example, the IT company has more rapid absorption of new knowledge that is provided by the external knowledge resources than the other four sectors. The machinery company has more stable relationship with its supplier than the other four sectors. Therefore, it is better to focus the investigation of the learning process on just one sector. The other phenomenon is that the knowledge intensity within these five sectors is different. In my further research, I am thinking that the sample will only be collected from IT companies since they have relatively high knowledge intensity above the average. It would be more helpful and clear for the investigation of the learning process.

3.1 Data Collection

Due to the fact that this project is focused on ‘a process’ discovery, a long-term and in-depth research method should be adopted. However, this project is just a pilot study of the main research; the evidence that has been provided was from a three-week investigation. It was conducted by three or four formal interviews and several informal interviews in each of the five companies. All interviews were recorded and field notes were recorded. The formal interviews were semi-structured by company history, internal relationship, organisational culture, external networking and sectoral environment. There are five companies that have been interviewed. Each interview was implemented for approximately one hour in a private space and was supported by some relevant documents and operational procedures (ex. visiting their factories). These samples that were chosen by the theoretical assessment were not claimed to represent the whole SMEs, but to provide some better understanding of the learning processes in SMEs.

3.2 Analysis Tool

Firstly, the context of interview which had been recorded was transcribed into written words. The conversations that were thought to be more relevant or helpful to the theoretical assumption were highlighted. For making a clear idea, the context of the interview was categorized by different themes, such as the background of how to establish the company, the influence of owner-managers, the education levels or skills of this company, the training programmes within and outside the organization, the difference between senior and junior people, special issues and the company’s further goals. For example, the conversation that is related to their managers or their owners was put into the category of

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the influence of owner-managers. The following conversation with an employee in firm A is taken as an example. (M -> me; E-> the employee)

The conversation was translated from Chinese to English.

- M: What time do you usually come to the office?
 E: About 8:30. We need to clock-in by 9:00 but the boss always arrive in the office at around 8:00, so I try to come to the office as early as possible.
 M: Has he ever asked you or other employees to come to the office earlier?
 E: No, never, he cares more about the work, the task. He said that as long as we finish the work for today, he doesn't care when we come or leave. However, the truth is, there are quite many things to do in a day, and also, I won't feel good if I leave earlier than my boss.
 M: So what time do you leave the office normally?
 E: Around 6:00p.m., the boss usually leaves by 6:00p.m.
 M: Right, how long have you been working for this company?
 E: Almost two years
 M: and do you think other colleagues also try to be in the office earlier and don't like to leave the office earlier than the boss?
 E: en.. I think so. At least I haven't seen anyone leaving earlier than the boss.

Analysis: The owner in Firm A seems to have strong influence on the company. A routine may be implemented more effectively by leading it with personal examples than by simply announcing it.

Secondly, to demonstrate the different learning resources between family business and non-family business, I use a diagram to show the differences. (Table 3.1)

Table 3.1

| | Owner-mangers | Internal resource | External resource |
|-------------------------------------|--|---|---|
| Family Business | | | |
| Firm B Firm C Firm E | <ol style="list-style-type: none"> Most of the main decisions are made by the owners The new ideas usually come from owner-managers Selecting relatives rather than selecting professionals. (e.g. In firm B, the owner said, for some important job, I prefer trusting the people whom I've known, and I believed at least they will be honest to me.) | <ol style="list-style-type: none"> Stable relationships. (as mentioned earlier, the family business may have two or more families working in the same company and it may be helpful for organisational memory) Organisational culture - trust, which is relatively high since employees have close relationships. | <ol style="list-style-type: none"> They all have stable relationships with their supplier. The new products may be depending on the market requirement or the new government policy. -> stimulating innovation. (Firm E established a new branch for research and development of the new products in order to face the new government policy.) (Firm B is an exception, as biotechnology industry needs to |

| | | | |
|--|--|--|---|
| | | | maintain their patent by continuous development of better products, said by their R&D manager) |
| Non-family Business Firm A & Firm D | <ol style="list-style-type: none"> 1. Main decisions are made by owner-managers 2. New ideas may come from other employees (e.g. In firm D, any new idea can be emailed to the owner directly.) 3. They are likely to spend money in employing professionals. (e.g. the owner of firm A was trying to keep one of their excellent managers by offering him better pay and other benefits) | <ol style="list-style-type: none"> 1. Turnover of personnel is relatively high. (The HR manager of Firm D said, 'We need to recruit new members almost every season (every three months).') 2. The routine is relatively open-minded for the new knowledge. (In firm A, they organise a monthly meeting to discuss about if the company is lack of any necessary resources.) | <ol style="list-style-type: none"> 1. They also have good relationships with their suppliers. 2. They ask the suppliers to improve their products in order to match the companies' new demands. -> This could explain why they are more active in innovation, but it may also be just the result of their fierce industrial competition. |

Finally, the findings are concluded and the results of this pilot research will be discussed in the next section.

4 CONCLUSION

4.1 Findings & Results

The first finding in this pilot study is that the owner-managers have significantly strong influence on learning process, especially in family-based business. In family-based business, senior managers are dominated by the family members and the atmosphere in the organisation is more like a big family. Owners like to hire people whom they have known, therefore, some of the employees were introduced by their relatives who have already been working in that company. Also, employees tended to send their second generation to work for the same company (as mention earlier, they believe that they can teach their son or daughter better). Therefore, in family business, the existing knowledge is more easily to be passed forward and the main culture of the company is more likely to be understood and continued. For example, as I interviewed Firm E, their owner and the administration manager both mentioned that their basic management idea is based on ‘people’. This may indicate that their organisational culture is relatively better understood by the employees of the company. On the other hand, the non-family-based business is organised under a

relatively formal routine (Firm A and Firm D both have relatively formal training courses within the companies). The non-family-based company is also mainly managed by owner-managers, but the turnover of the employees is at a relatively high rate. Employees may leave the job for better working opportunities in larger companies. This could bring a barrier for the approaching of a better learning situation.

The second finding is their immediate learning. Although the SMEs all have internal and external networks, the knowledge intensity and learning speed that are required by family-based or non-family-based businesses are different. Non-family-based business tends to have latest knowledge upgrading more aggressively than traditional family-based business. Without family's burden, the new idea is more easily to be adopted and the new information is more likely to be understood.

In brief, this project is not going to provide any representative phenomena, but to establish insights into the different learning process between family-based business and non-family-based business. Family-based business has more stable relationship even in internal or external network, though the family-based companies are not keen to update new knowledge regularly. Non-family-based business earns new knowledge relatively quicker but the problem of knowledge inheritance could compromise the learning improvement. As learning is a long-term accumulation, family-based business may have advantages in developing their knowledge domain.

4.2 The further discussion

1. What are the main factors of learning and knowledge formation in SMEs?

First of all, it is necessary to identify the major factors that may influence learning formation in SMEs. Based on the relevant literatures, the research will follow three approaches, owner-managers, organisational culture, and environmental reflection. As owner-managers played an important role in SMEs, how do they influence the learning in SMEs? How does the organisational culture guide the organisations? And how far does the relationship built from internal and external networks affect the learning?

2. What is the difference in learning background between family and non-family businesses? How does family business learn and how does non-family business learn?

Secondly, I concluded those factors as ‘the background’ of an organisation, and then compared the difference between family and non-family businesses. From my pilot study, family business was found to have a better ability of organisational memory but weaker on immediate learning, which is one of the discussed points.

3. How do their differences in learning opportunities influence the innovation?

Thirdly, I would like to discuss how the different learning opportunities affect the innovation. In Taiwanese SMEs, as mentioned in the previous section, have relatively difficult environment on innovation. However, innovation is a key ability to the survival in the fierce competition, therefore, it is important to use the existing knowledge and resource to create new opportunities. The relevant questions are:

- (1) How do family business and non-family business use their knowledge resource and networks to innovate their products?

- (2) How do the different ownerships (family-owned and non-family-owned) influence their innovation?
- (3) How do the different organisational cultures affect their innovation?
- (4) How do the different internal and external relationships influence the innovation?

4. Who acts more effective organisational learning? Family business or Non-Family business?

This issue is trying to combine the organisational learning theory to this study. As many literatures have mentioned the benefits of operating organisational learning, this discussion may give a contribution on SMEs development.

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