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Knowledge Management

Barometer Study

Federal German Ministry of Economics and Technology

- Executive Summary -

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Knowledge Management Barometer Study

Different countries – different strategies?

Knowledge management continues to be seen by experts as extremely relevant to the daily life of a company and its success, both nationally and internationally. The following results were gained in an explorative pilot study called Knowledge Management Barometer, conducted from July 2007 to January 2007.[1] The study was set up on both quantitative and qualitative lines for the Federal German Ministry of Economics and Technology with the aim of inquiring into the latest knowledge management approaches in an international context. It covered 42 experts from science, industry, industrial associations, politics, consultancy, and trade magazines in seven participating countries: Germany, Lithuania, Hong Kong, the UK, Denmark, France, and the USA. The aim was to explore national trends in the use of technical support tools in knowledge management as well as an initial comparison that indicates the position of each country in its use of IT tools for this purpose. The focus was on an international description of trends in IT tools in knowledge management, as seen by selected experts. Experts were asked to concentrate on nationwide developments, rather than on stand-alone IT solutions. Responses turned out to be highly homogeneous within each country, and the technical dimensions, too, displayed only minor variations within the seven countries.[2]

People – Organisation – Technology

Questions on the realisation of knowledge management centred upon three factors: humans, technology, and organisation. Human factors (motivation, human resources, and senior management support) were seen as either highly important or virtually indispensable in all countries. This assessment, however, was matched by a relatively weak level of realisation in most countries. The only place where senior management support was regarded as fairly highly developed was Hong Kong. Such support is clearly seen as the weakest element in Germany, where it is also strikingly at variance with the experts' assessment of its relevance. Another feature that is more striking in Germany than elsewhere is the discrepancy between the perceived relevance and realisation in the area of motivational activities. Where

[1] We would like to thank all interviewed experts for being so cooperative.
[2] The next stage will be to validate the trends found among experts through a representative survey among companies.

organisational factors are concerned, strategic orientation and integration into business processes show a relatively homogeneous picture in the assessment of relevance, which is generally very high. However, this is counterbalanced by a clear gap between reality and the target, as the experts reckon that the level of realisation is rather low. When it comes to the realisation of a strategic focus, there are considerable differences between the various countries: the UK, Denmark, and Hong Kong are apparently in the lead, while in Germany integration into business processes is seen as having the lowest level of realisation. Except for the UK, realisation is at a similarly low level in the other countries. The relevance of a corporate culture is regarded as extremely important in Germany, where it is given the highest ranking, while organisational factors are seen by the other countries as least important, even though surprisingly – with the exception of the USA – they all display higher realisation values. Although the UK only gives a low relevance rating to this area, it is clearly in the forefront when it comes to the actual realisation. A similar picture emerges in the specification of responsibilities and roles. Top values in realisation were achieved by the two countries that gave this aspect the lowest relevance rating, probably because they are so advanced in this area: Hong Kong and Denmark. In Germany and the UK the realisation value was medium, although both countries see it as more important.

Technologies and tools in use

When it comes to the use of document and content management systems as well as collaboration and groupware systems, the leading country in IT tools for product lifecycles is Germany. In workflow management systems, Germany shares a top position with other countries. It occupies a medium position in e-learning. As, on the one hand, further training facilities are highly developed in Hong Kong and Denmark, they also have a considerably greater emphasis on e-learning than other countries. Germany, on the other hand, has room for improvement in the development of service-oriented architectures (SOA), agency, and notification systems as well as in search and classification systems.

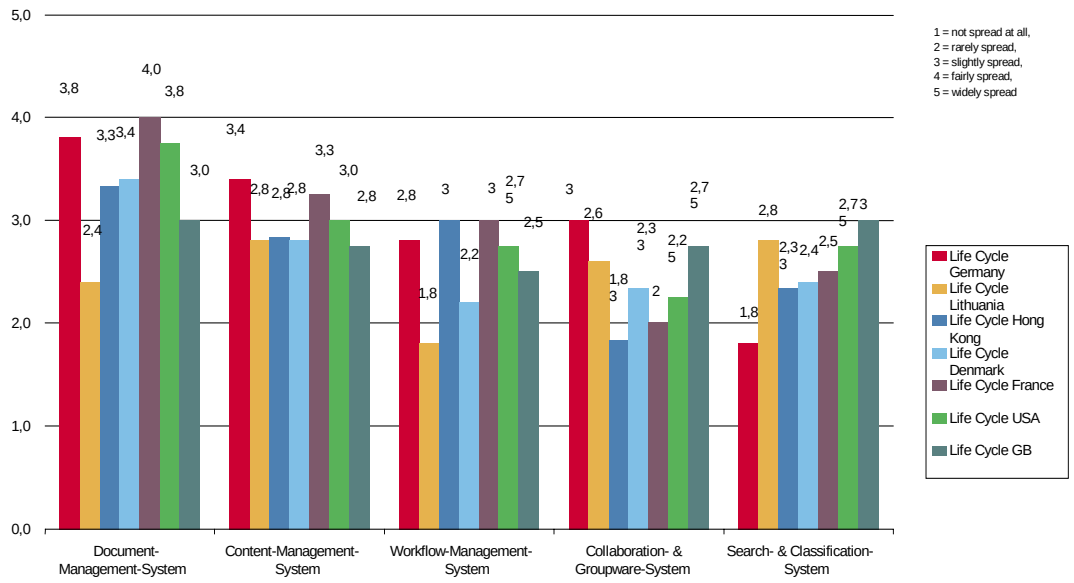

Figure 1: Lifecycles of IT tools (countries surveyed).

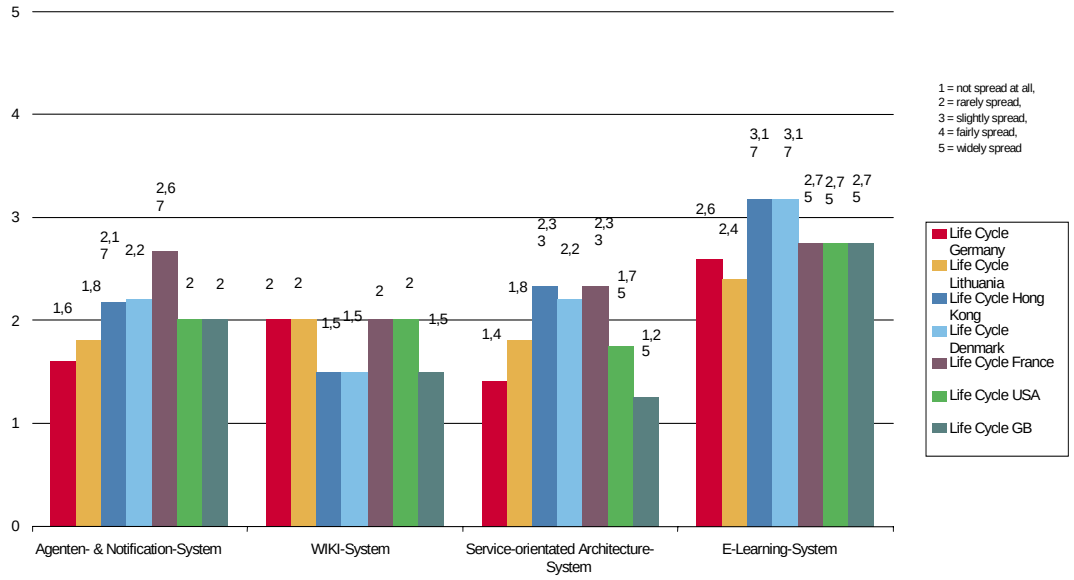

Figure 2: Lifecycles of IT tools (countries surveyed).

Unlike the product lifecycle, the distribution of IT tools used for knowledge management display significant differences between the various countries: document and content management systems are particularly widely used in Denmark, the USA, and the UK. In all, Denmark is in the lead with regard to CMS, DMs, WMS, and SOA. In tools such as WIKIs Germany and Lithuania are in the lead. This may be due to the structures of medium-sized companies in Germany. Such IT tools are used more readily in large companies than in small ones. Quite apart from the major expenses that are involved, medium-sized companies mainly tend to avoid such tools for lack of human resources.

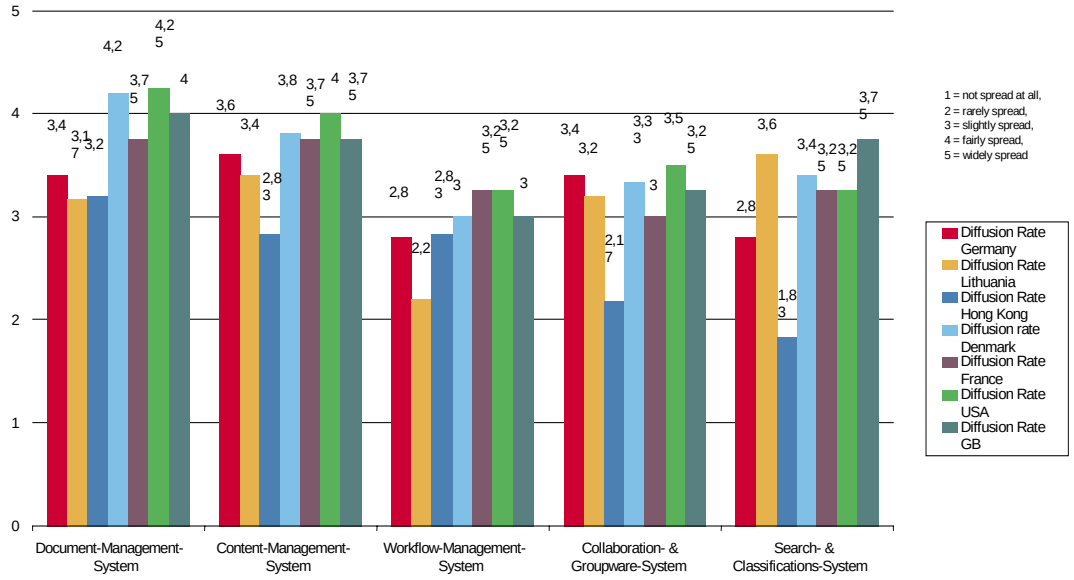

Figure 3: Distribution of IT tools (countries surveyed).

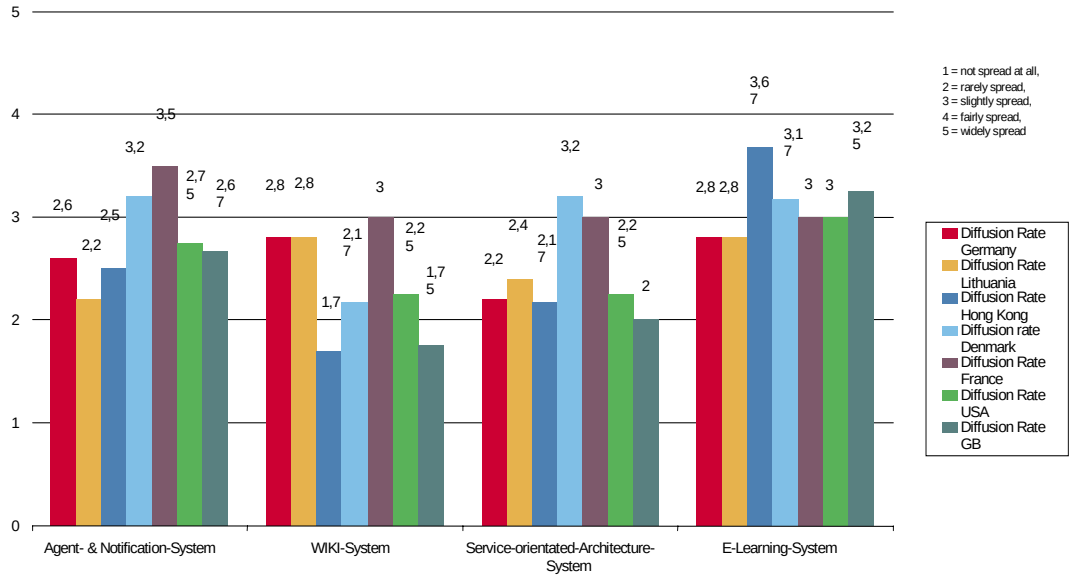

Figure 4: Distribution of IT tools (countries surveyed).

If we treat human and organisational factors as a single unit, then the same trend emerges in all countries, as all of them have, to a greater or lesser degree, significantly more emphasis on the other factor – technology. Outside this amalgam, we can observe a number of further distinct differences. The most striking feature appears to be the important position of technology in Germany, a factor which displays high values compared with the other two, both within Germany and compared with other countries. At the same time, the human factor seems to be conspicuously low in importance, despite Germany's widespread emphasis on corporate culture and on a holistic approach. To simplify matters, we have found that

other countries – with the exception of France – prioritise the human factor over other factors, at a ratio that is twice as high as those of other factors. But whereas other countries all rate the human and organisational factors as 2:1 in relation to technology, this relationship is reversed in Germany. In Hong Kong and the UK the human factor is particularly high.

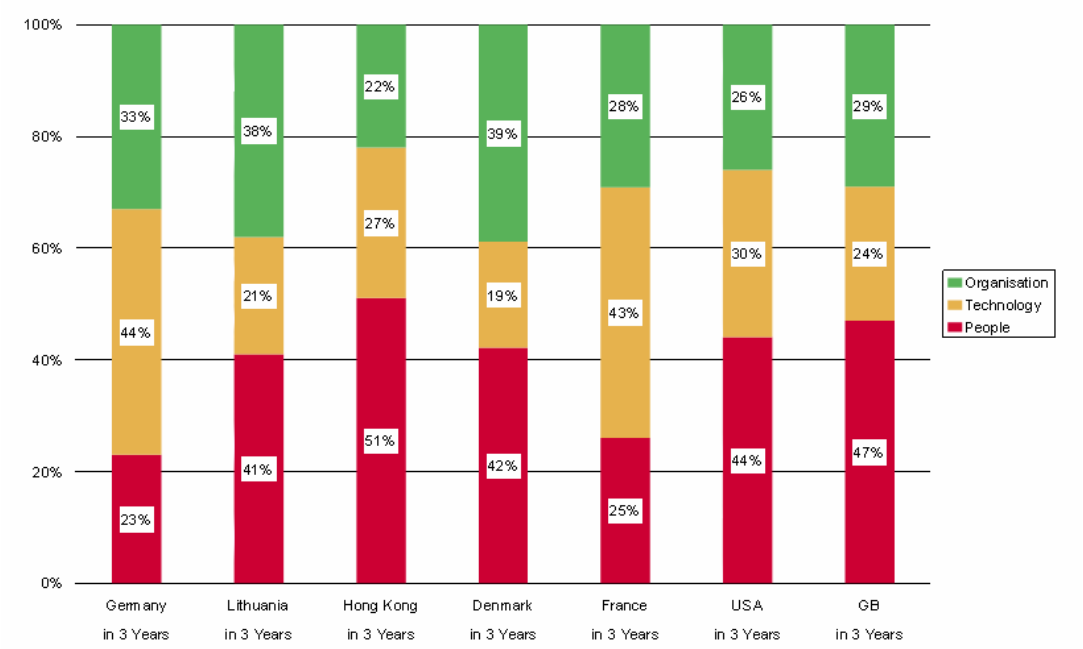

Figure 5: Ratio between organisation, technology and people in 3 years.

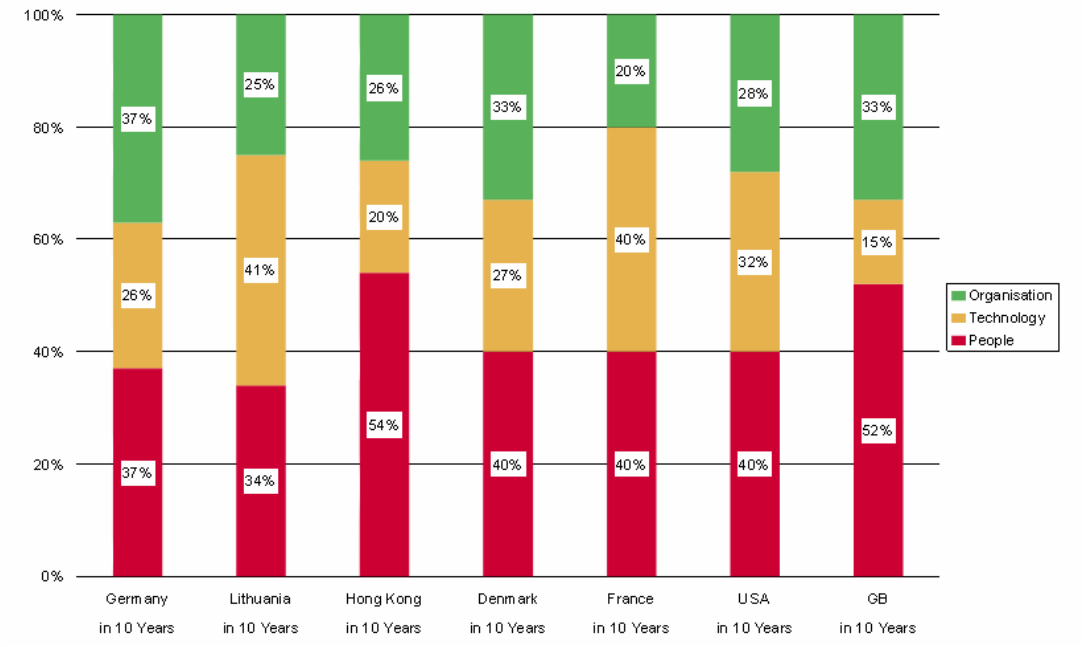

Figure 6: Ratio between organisation, technology and people in 10 years.

Lessons learned and outlook

To sum up, knowledge management will continue to be a highly relevant topical issue in all countries over the next few years. Knowledge management has been an object of intensive study for much longer in Germany than in other countries. All experts unanimously agree that the internet boom in 2001 led to a marked increase in the trend towards knowledge management. All the experts are confident that there will be a further increase in forward-looking trends and thus in knowledge management, which will mainly be brought about by the development of new information technologies – not straightaway but over the next few years. German experts tend to rate the supportive role of science particularly high, while US and UK experts put greater emphasis on the role of the media. All respondents viewed the Knowledge Management Barometer Study as positive. As none of the countries have any similar tools, it was felt that a modified, wider, and more long-term monitoring exercise would be an appropriate way to obtain a comparative analysis of development trends.

Appendix:

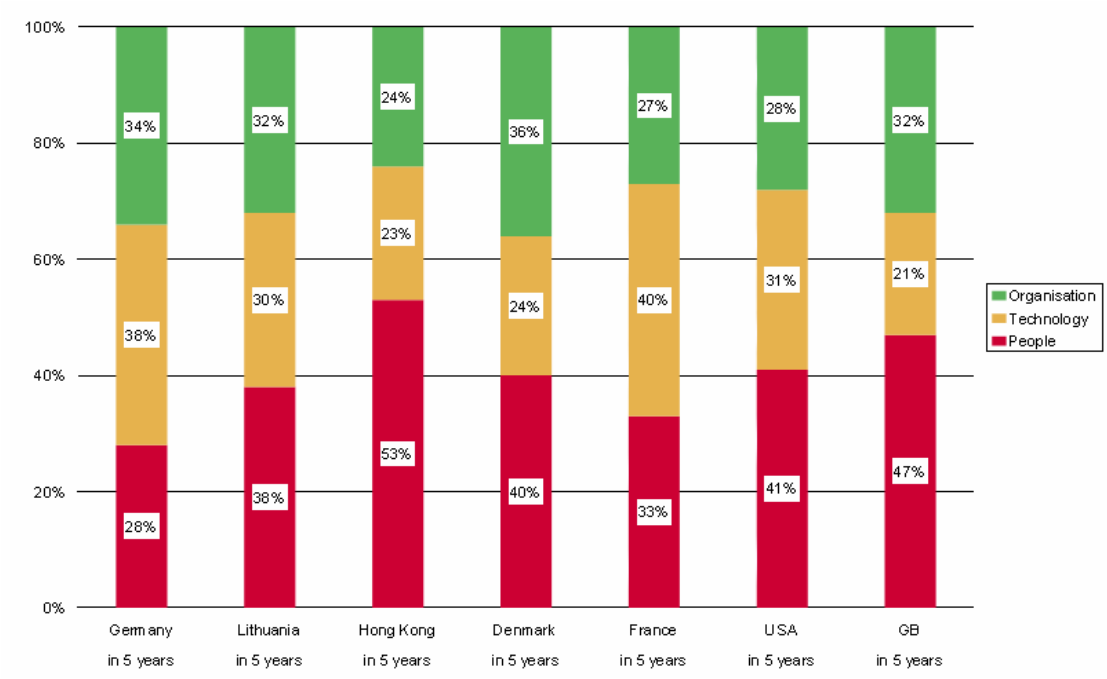

Figure 7: Ratio between organisation, technology and people in 5 years.

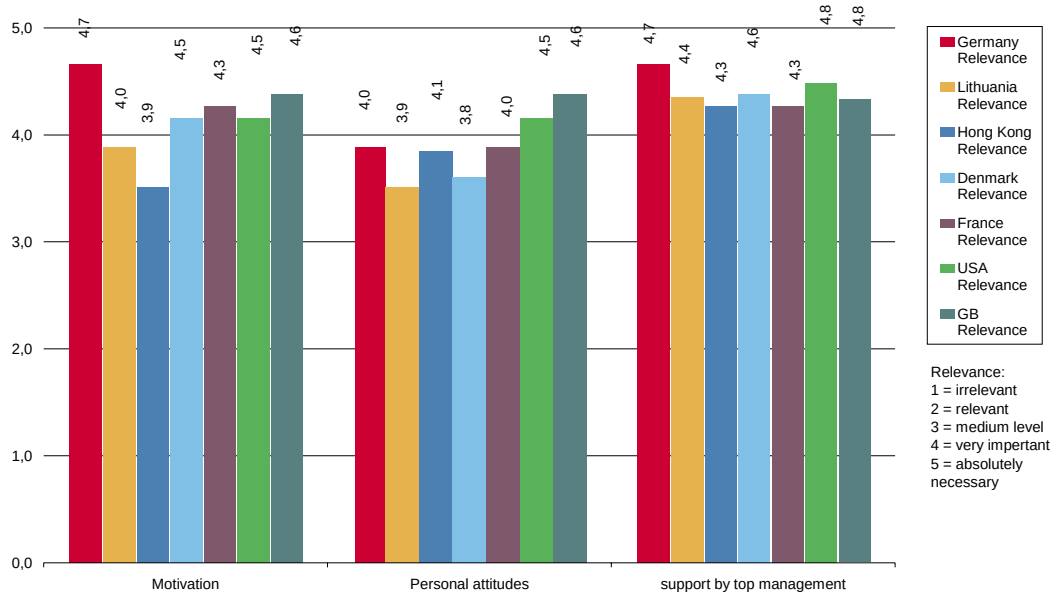

Figure 8: Relevance of KM concerning people.

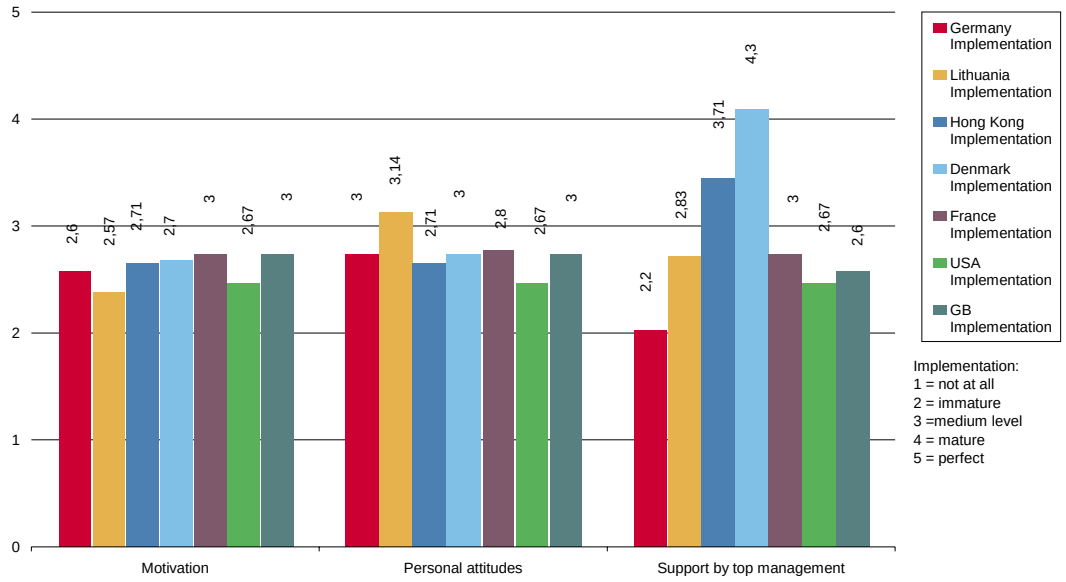

Figure 9: KM implementation concerning people.

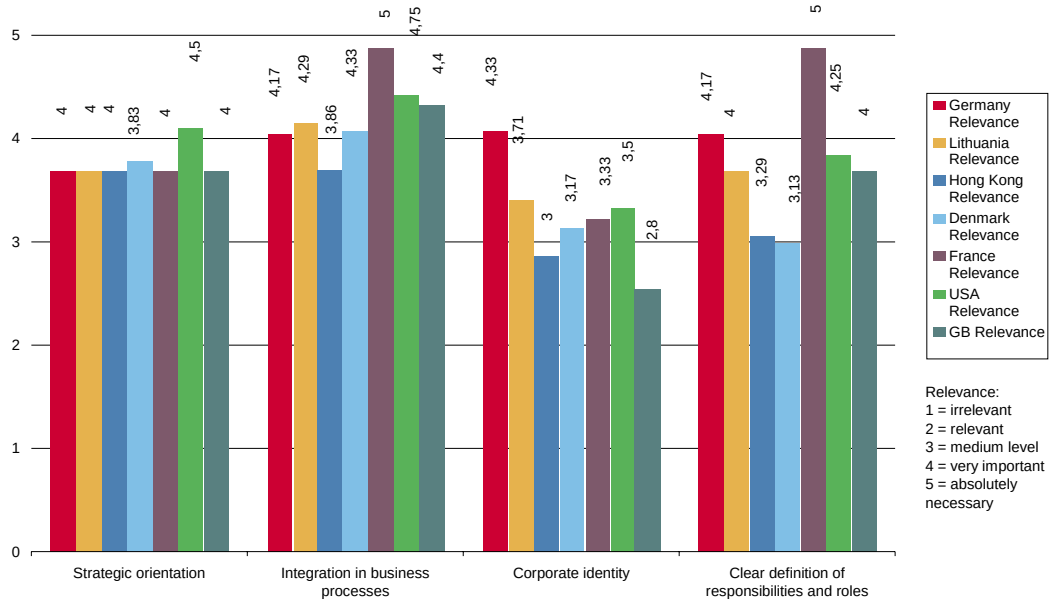

Figure 10: Relevance of KM concerning organisations.

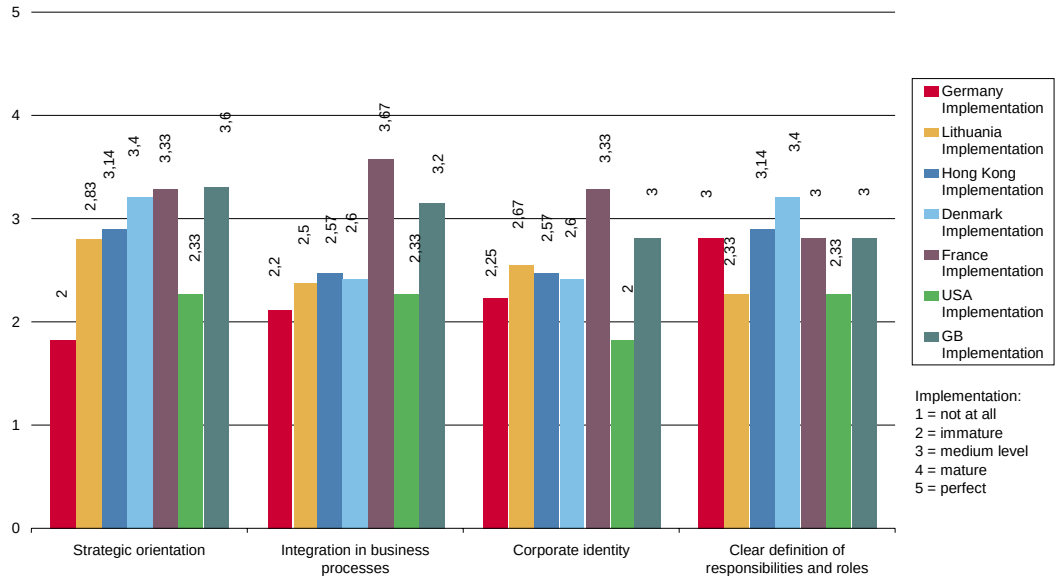

Figure 11: KM implementation concerning organisations.

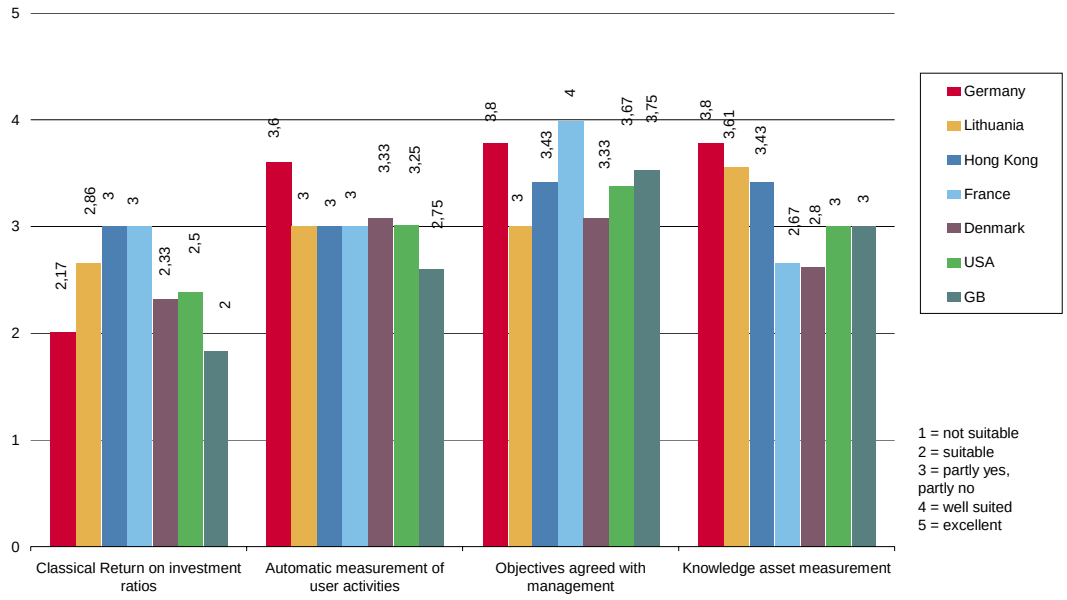

Figure 12: Controlling Approach.

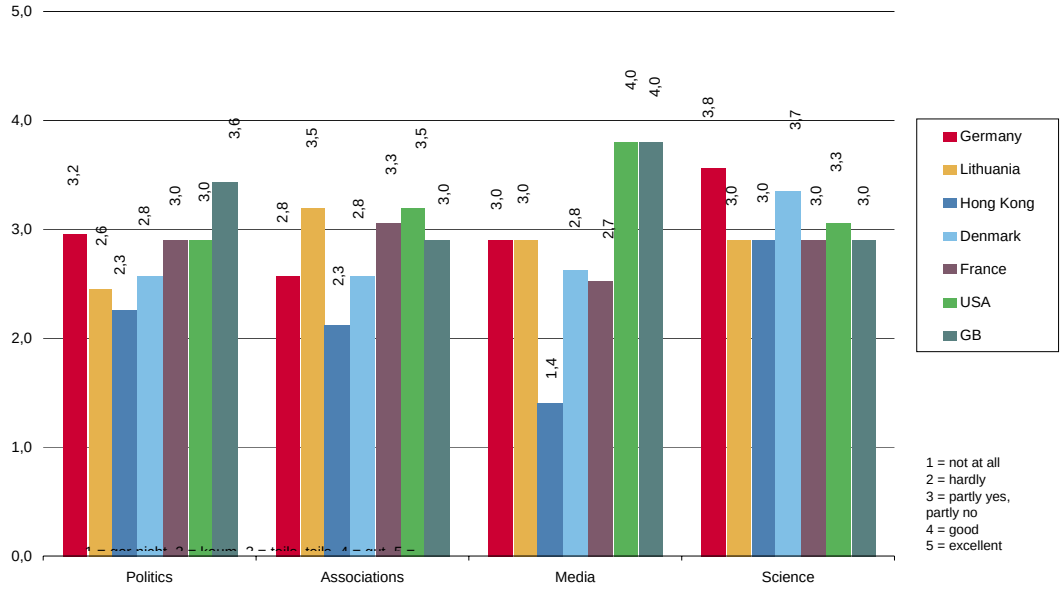

Figure 13: Assessment of Activities.