



SOCIO-ECONOMIC INSTITUTE OF  
FIRMS AND ORGANIZATIONS

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[www.iseor.com](http://www.iseor.com)

International Research center

# REALIZATIONS

## 1975 - 2018

# [ 2018 key figures ]



- 1973 work starts on the socio-economic management concept
- 1975 creation of ISEOR
- 43 years, of socio-economic management research, unique in the world
- 2.000.000 hours of research so far
- More than 595 teachers and researchers have been trained through research in this Institute
- 166 Doctors in management science have prepared their PhD at ISEOR
- 1st French institute, center of excellence with worldwide recognition in its field (“think Tank”)
- 125 researchers and young researchers are currently active
- Socio-economic methodology carries weight worldwide; 45 countries from 4 continents have placed their confidence in ISEOR
- 2.000 client and partner companies have worked with ISEOR since 1973
- A company’s hidden costs amount to between 15.000 and 70.000 euros per person per year
- Since 1991, development of the laboratory as an international network
- From 2001 to 2017, in Lyon, France, ISEOR organized 17 Academy of Management (USA) international symposia with participation from over 1500 academics from 45 countries.
- In 2007, in Lyon, ISEOR organized the 1st Transatlantic Congress of Auditing, Accounting, Control and Cost Management in partnership with the International Cost Institute (ten South American countries plus Spain, Portugal, France) and the American Accounting Association (USA). In 2010, the 2nd transatlantic conference was organized in Lyon and 3th in 2013, 4th in 2017.

## PUBLICATIONS

Nearly 250 scientific papers in French, English, and Spanish from ISEOR researchers have been presented at symposia and congresses of the Academy of Management (USA), EGOS (European Group of Organizational Studies), ACACIA (Mexico), CEDE (Spain)

- Almost 800 articles and papers have been published by ISEOR researchers
- 140.000 pages of publications from ISEOR members
- 78 books published on their research in french, english and spanish
- 1978: Revue Sciences de Gestion (management sciences review) first saw the light of day
- Every year, 6 issues of Revue Sciences de Gestion / Management Sciences / Ciencias de Gestión are published in 3 languages (French, English, Spanish).
- In July 2011, restructuring RSDG reviews : the new title is “RECHERCHES EN SCIENCES DE GESTION – MANAGEMENT SCIENCES – CIENCIAS DE GESTIÓN”. Electronic version is on web site : CAINR INFO & EBSCO.
- from January 2018, the reviews will be in electronic version.
- 800 articles published in the Review (only 15 of these concerned ISEOR research for reasons of impartiality)
- 1.450 research reports and more than 12.000 information letters are periodically sent to companies, institutions, and teacher-researchers
- So far, 203 doctorate theses have been prepared, 166 of which have been supported

# [ ISEOR Web Site in 3 languages ]



# www.iseor.com

www.iseor-formations.com

**Excellence en management stratégique et opérationnel**  
FORMATIONS INTER-ENTREPRISES

Contact : 04 78 33 09 66  
- Par mail  
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**NOS FORMATIONS EN MANAGEMENT SOCIO-ÉCONOMIQUE**

Plus de 2000 personnes se sont formées à ces stages socio-économiques en France, aux États-Unis, au Mexique, en Espagne et au Liban...

**6** stages de formation pour les dirigeants, managers, consultants

**1 - Réussir le changement : outils et méthodes**  
(en français, anglais et espagnol)  
Ce stage permet d'acquies des méthodes de consultation, de gouvernance et des outils pour piloter le changement, le management et l'innovation des entreprises.  
-> Télécharger la présentation (pdf)  
Prochaines dates :  
Session 1 : 6 et 7 juillet 2016  
Session 2 : 12, 13 et 14 septembre 2016  
Session 3 : 5, 6 et 7 octobre 2016  
Session 4 : 28, 29 et 30 novembre 2016

**2 - Gérer le comportement en milieu professionnel**  
Ce stage apporte un soutien très opérationnel dans la gestion des comportements en situation complexe, notamment en cette période de crise qui accroît le phénomène de stress et des relations tendues.  
-> Télécharger la présentation (pdf)  
Prochaines dates :  
session 1 : 3 et 4 (matin) novembre 2016  
session 2 : 20 et 21 (matin) décembre 2016

**3 - Autofinancer l'entreprise : les ressources cachées**  
Ce stage introduit la méthode originale des coûts-valeurs des activités qui permet d'appréhender très concrètement la mise en pratique du contrôle de gestion renforcé par les outils et la méthode socio-économique.  
-> Télécharger la présentation (pdf)  
Prochaines dates :  
session 1 : 30 juin et 1er juillet 2016  
session 2 : 6 et 7 septembre 2016  
session 3 : 4 et 5 octobre 2016

**4 - Perfectionner les intervenants internes et consolider le management socio-économique**  
Ce stage est réservé aux consultants internes déjà formés à la méthode socio-économique et constitue un stage de perfectionnement sur les outils et méthodes.  
-> Télécharger la présentation (pdf)  
Prochaines dates :  
session 1 : 3 et 4 novembre 2016  
session 2 : 20 et 21 décembre 2016

**5 - Vendre en milieu turbulent**  
Ce stage est destiné aux Dirigeants, Directeurs commerciaux, Directeurs des ventes, Directeurs de marketing et de la recherche et développement... pour améliorer la performance commerciale.  
-> Télécharger la présentation (pdf)  
Prochaines dates :  
Session 1 : 21 et 22 septembre 2016  
Session 2 : 27 et 28 octobre 2016  
Session 3 : 1er et 2 décembre 2016

**6 - Faciliter la coopération Gouvernance et Management**  
Ce stage est proposé aux Administrateurs et à la Direction d'Associations et permet d'améliorer la coopération entre le système de gouvernance et le management.  
-> Télécharger la présentation (pdf)  
Prochaines dates :  
Dates à définir

www.iseor-consulting.com

**Excellence en management stratégique et opérationnel**  
CONSEIL ET INTERVENTIONS AU SEIN DES ENTREPRISES ET DES ORGANISATIONS

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- Par mail  
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- Inscription Newsletter

**Le management socio-économique, vous connaissez ?**

40 ans d'interventions dans 1054 entreprises sur 72 secteurs :

- de nombreux outils opérationnels
- de sérieuses performances sociales et économiques

Un de nos défis : Mettre en oeuvre les décisions prises en situation de crise globale et durable

**LE CONTEXTE ACTUEL EST INTRANSIGEANT**

- Crise
- Mondialisation
- Enjeux
- Concurrences
- Pressions stressantes
- Très grande vitesse
- Innovations...

**VOUS ÊTES CONSCIENT qu'il faut moderniser le management de votre entreprise**

**Nous vous accompagnons dans la métamorphose, la conduite du changement, les évolutions et la rentabilité**

**LES PROBLÈMES DANS VOS ENTREPRISES ET VOS ÉQUIPES**

- Votre entreprise est en croissance mais votre rentabilité baisse
- Vous avez perdu quelques bons clients
- Vous voulez des résultats financiers durables
- Vous subissez une exigence accrue de la part de vos clients
- Vous éprouvez des difficultés pour assurer de bons recrutements
- Vous voulez améliorer la coopération au sein de vos équipes
- Vous souhaitez accompagner les évolutions des collaborateurs dans l'entreprise

**Il faut simultanément s'occuper ... du Management Opérationnel & du Management Stratégique**

Le management socio-économique permet de :  
- orchestrer les dynamiques et l'énergie de changement  
- accroître le degré de professionnalisme des managers  
- enraciner les pratiques sur l'ensemble des managers et la totalité du personnel.  
- mesurer tous les mois les progrès de résultats économiques et sociaux de l'entreprise dans un contexte de pression concurrentielle

Notre méthode est compatible avec toutes les démarches de performance et de qualité déjà implantées dans votre entreprise ou organisation.

Nous vous proposons des formations étou des interventions au sein de votre entreprise

www.iseor-recherche.com

**www.iseor.com**

15 chemin du Petit -Bois  
69134 Ecully cedex - France  
(33) (0)4 78 33 09 66

**4ème colloque et séminaire doctoral international en partenariat avec la Division ODC - Academy Of Management - États-Unis - 5 et 6 juin 2012 - Lyon**

**Une méthode innovante, efficace et durable**  
L'ISEOR, centre de recherche et d'expertise en management socio-économique, intervient dans les entreprises et organisations sur la méthode des coûts cachés, améliorant la qualité, l'efficacité et l'implication du personnel. 37 années d'expérience (600 intervenants-chercheurs) dans 1200 entreprises et organisations de 35 pays ont permis des résultats significatifs.

**Intervention en entreprise**  
Vous souhaitez appliquer une méthode organisationnelle efficace et durable prenant en compte la dimension économique mais aussi sociale

**Formations professionnelles pour dirigeants, cadres, manager, consultants...**  
1- Réussir le changement : outils et méthodes.  
2- Gérer le comportement en milieu professionnel.  
3- Autofinancer l'entreprise : les ressources cachées

**Laboratoire de recherche**  
Nouveau programme de recherche la TETRANORMALISATION

**Développement international**  
Partenariat académique et professionnel soutenu avec le Mexique et les États-Unis

**Nouveautés**

- Origine des crises- Henri savall (suite)...détail >
- Le Prix Raymond Vatter 2010 a été attribué à un étudiant du Master Management

**Agenda**

- Les 15 et 16 juin 2011 : colloque international ISEOR/AOM (Academy Of Management) sur "Les indicateurs d'évaluation des impacts des recherches dans le domaine du management" > détail In English / En Español
- Le 19 septembre 2011 : séminaire de rentrée universitaire pour les étudiants et enseignants d'EUGENOV - IAELyon
- Les 20 et 21 octobre 2011 : colloque d'automne de l'ISEOR "Les entreprises familiales: création, succession, gouvernance et management" > renseignements
- Le 4 novembre 2011 : Journée François Perroux à l'ESC Clermont Ferrand > Voir détail
- Le 7 novembre 2011 : Réunion annuelle de l'OCDE. Participation de Henri Savall et Véronique Zardet... > Voir le communiqué > Voir la présentation sur le site de l'OCDE
- Les 5 & 6 juin 2012 : colloque et séminaire doctoral international ISEOR/AOM (Academy Of Management) avec la Division ODC

# English French Spanish



In 2010, the site of the ISEOR evolved towards a more ergonomic version bringing to light **new columns (sections)** such as «diary», « latest publications», «news / novelties» and a selection of specific pages for professionals, teachers or students.

**And in 2016, creation of two new websites : iseor-formations and iseor-consulting**

# [ International construction of an innovative theory ]



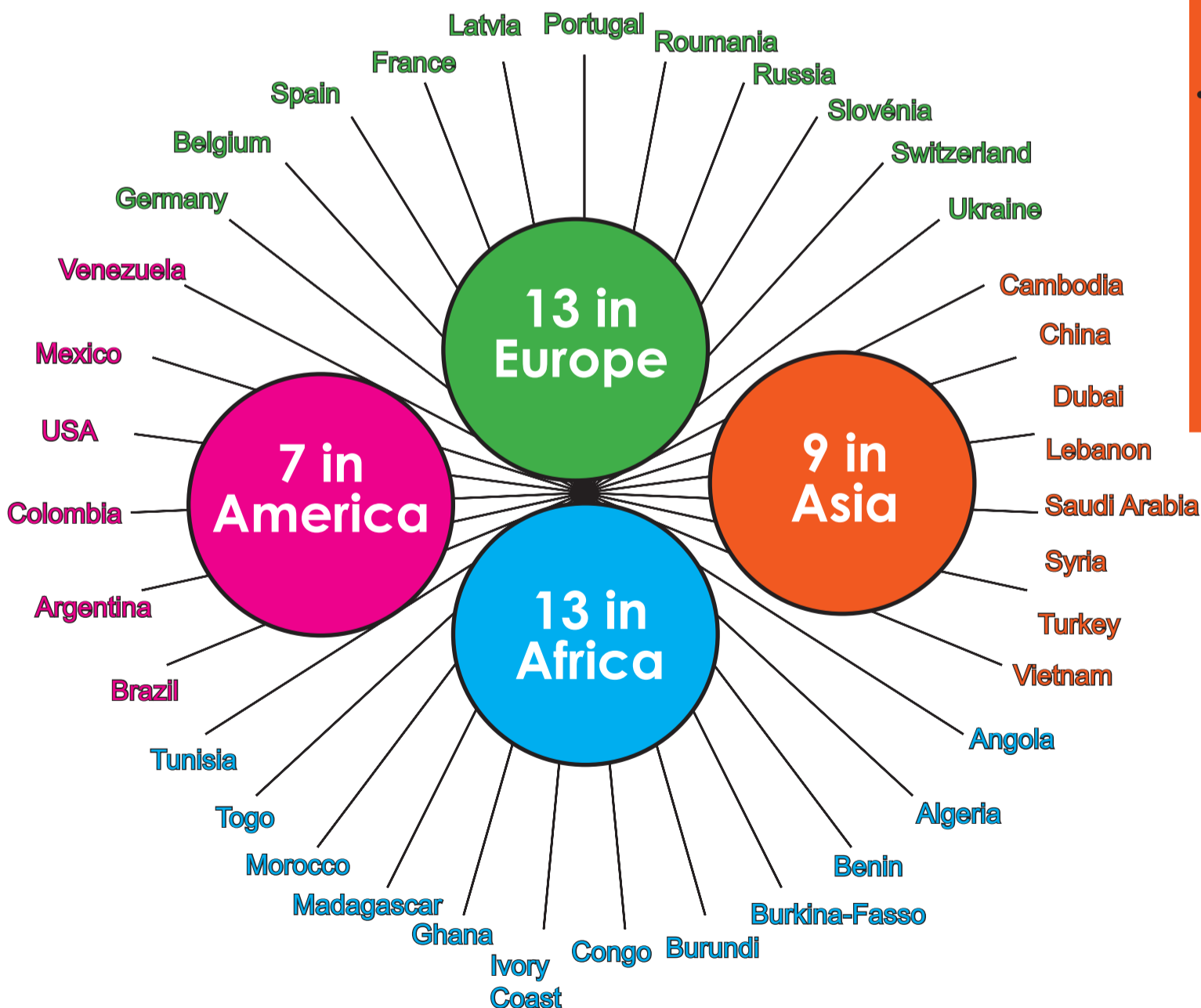
## 2 founding principles: socio-economic management and intervention-research

- In addition to its interventions in France, ISEOR also gets involved internationally:
  - 45 countries in 4 continents

- ISEOR publications are issued in three languages:
  - French
  - English
  - Spanish

- Symposia organized by ISEOR featuring simultaneous interpretation between French, English, and Spanish

- 3 pilot countries: intensity of research-interventions
  - in France
  - in Belgium
  - in Mexico



• 2017 - NOMINATED CHEVALIER (KNIGHT) OF LEGION OF HONOUR

- Henri Savall has been nominated (knight) of Legion of Honour, by way of french Ministry of Higher Education and Research.
  - This high national distinction rewards Henri Savall for his many international works for an economy more human, a social life more ethical and a University more civic and less elitist.

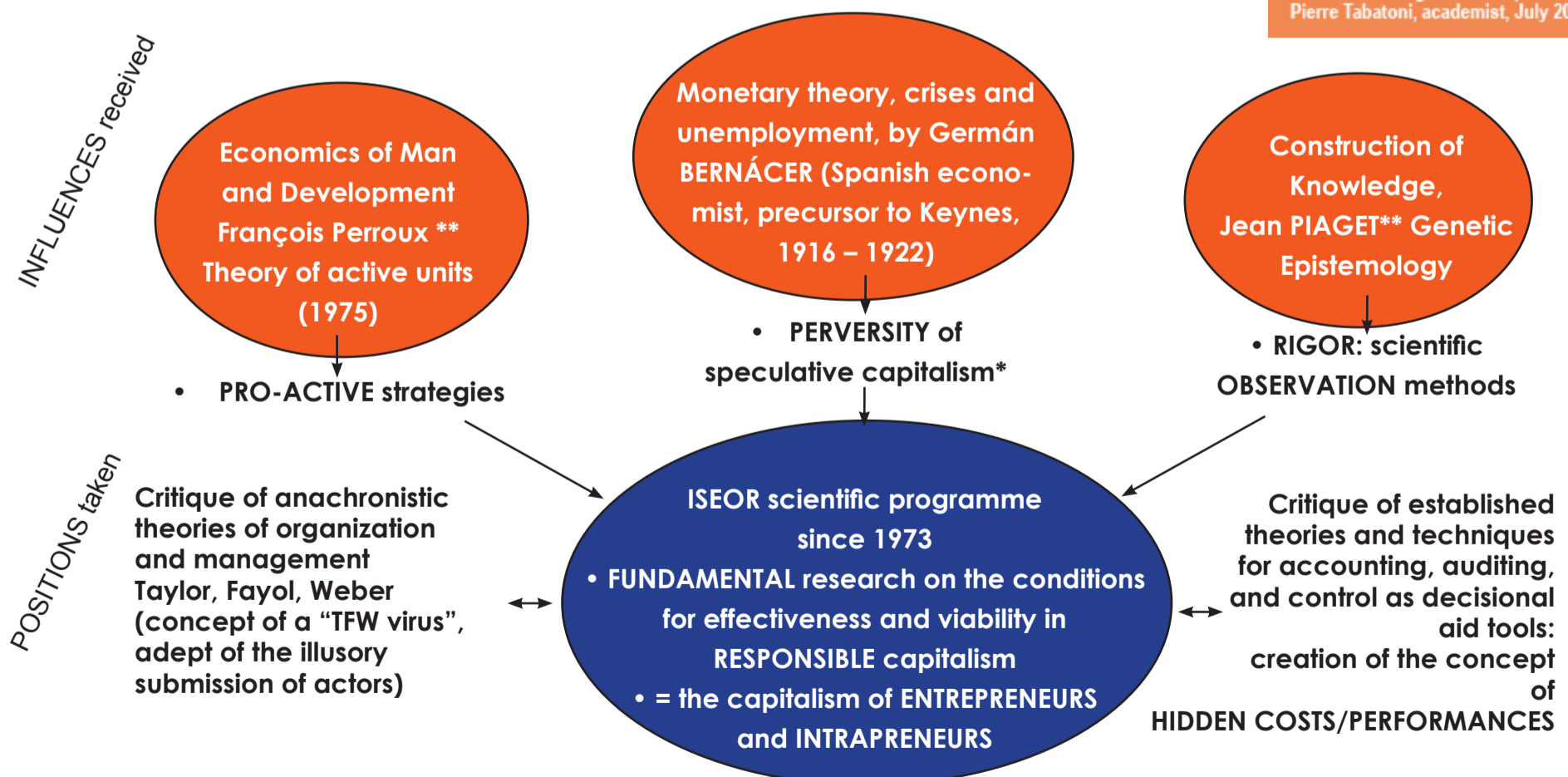
# [ Genesis of the socio-economic theory of organizations ]



## An alternative to the established but fragile macro-economic theory

- **Purpose:**
  - SUSTAINABLE (as opposed to ephemeral/speculative) economic and social performance involving a GLOBAL approach to the organization
- **Refutation of theories:**
  - Classical, Marxist, neo-classical, Keynesian theories on the two (equivalent?) production factors of capital and work.
  - Works on econometrics (Carré, Dubois, Malinvaud, 1972):
  - The Capital/Work model accounts for only 45% of French growth
  - Mysterious residue of 55%: enlightenment by the theory of HIDDEN COSTS/PERFORMANCES
- **Proposed paradigm:**
  - Human potential is the sole ACTIVE factor in creating added value
  - Technical and financial capital: “inert” inner TOOL
  - Dominance of the COMPLEMENTARY NATURE of the two factors as opposed to substitutability
- **Principles (experimented)**
  - Generalization of the ORGANIZATION concept
    - Nation = complex macro-organization
  - Unification of the economic purpose of public and private organizations, be they profit-making or not: generation of ADDED VALUE
    - Redefinition of an organization’s goal: concept of A BALANCED DEVELOPMENT BUDGET, substituting that of maximized profit.
    - System of socio-economic reporting for INTERESTED PARTIES: economic performance indicators (immediate results + creation of potential).

• In 2009, Henri Savall was made Chevalier dans l’Ordre des Palmes académiques by the Ministry of Education for the services rendered to the Department of Education



Book in the process of preparation “1883\* - 1903” death of Marx, birth of Bernácer, Keynes, Schumpeter; 1903: birth of Perroux

\* see H. Savall “G. Bernácer, l’hétérodoxie en science Économique”. Collection des Grands Economistes, Dalloz, Paris, 1975 ; see 2<sup>nd</sup> up-date edition, published in the USA (in french) : «Root origin of economic crisis : Germán Bernácer, pioneer and visionary», Charlotte (USA) : IAP, 2012

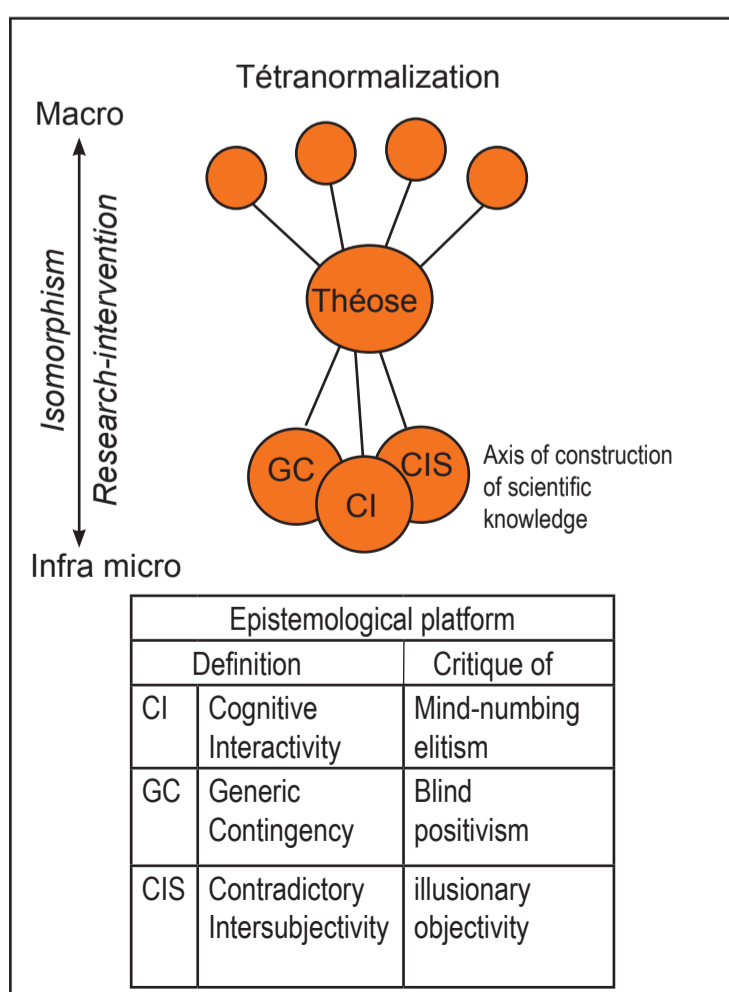
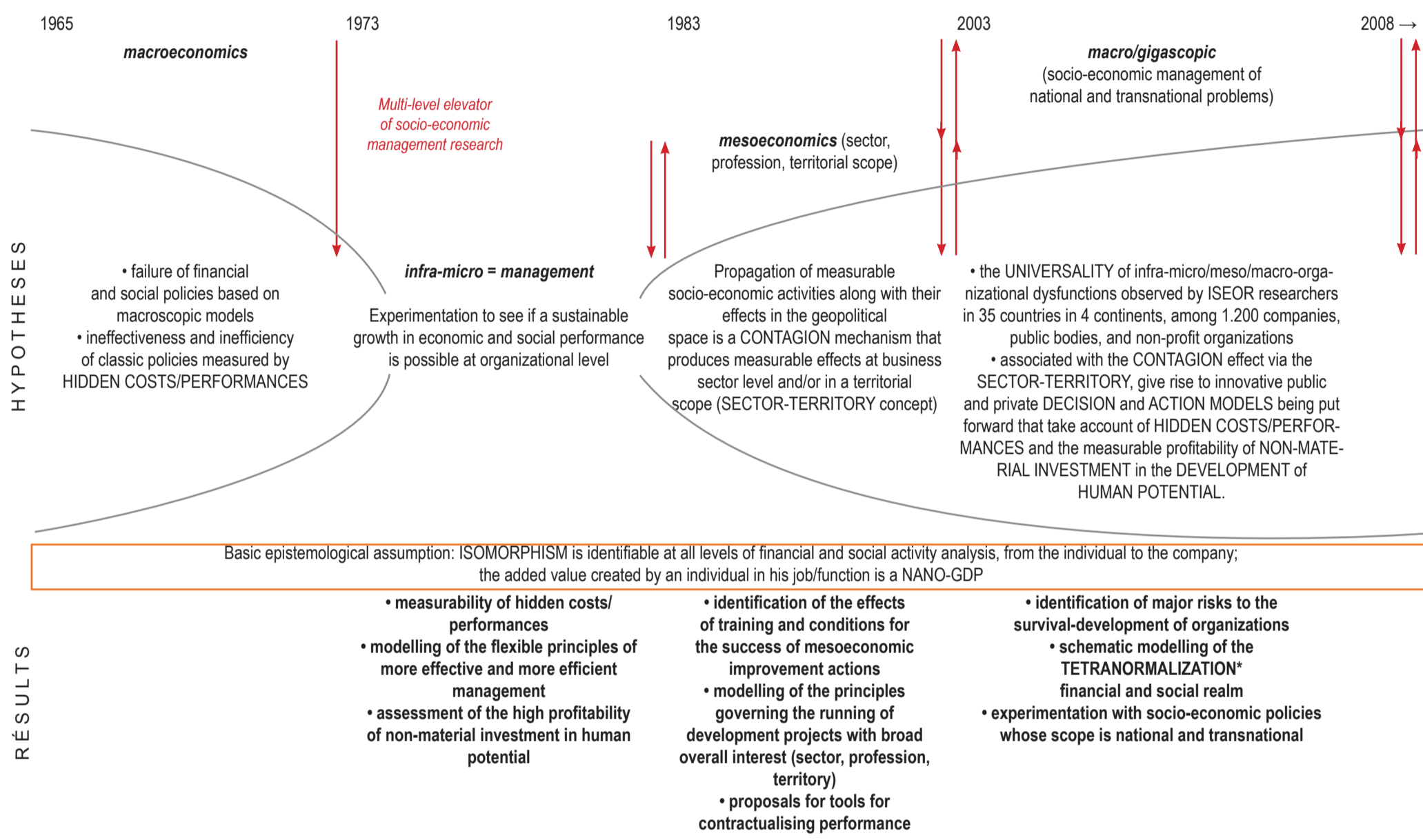
\*\* see H. Savall “Compatibilité de l’efficience économique et du développement humain. La régulation socio-économique dans l’entreprise”.

Treatise presented to Collège de France (1977) at the symposium chaired by Jean Piaget and François Perroux on “the idea of regulation in the sciences movement”, published in the review “Économie Appliquée”, 1978.

# [ Socio-economic theory and management ("Théose") ]



## Development of concepts and timeline



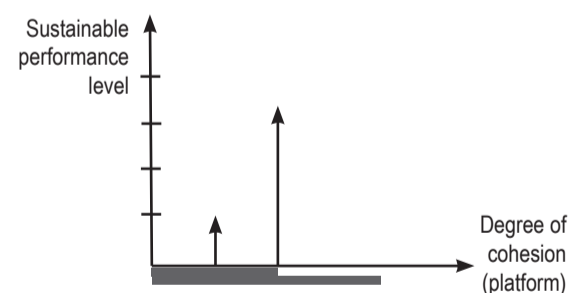
### • Theory of the strategic platform

- The **Multiplying** effect of the platform's robustness: doubling the degree of cohesion can at least triple the level of performances

#### Premise

**Organization of a dialectic system for conflicts-cooperation**

- The way resources are **Apportioned** (time, skills, non-material and material investment) determines the **DEGREE OF COHESION** of an organization or the **robustness of the PLATFORM**



### • 3 warning ratios in the strategic running of organizations

- 1/ **Hidden costs (performances) / visible costs (performances)**
- Indicator of the **origin of lost effectiveness and efficiency**
- An upward trend in this ratio is forewarning of a loss of effectiveness and efficiency

- 2/ **External costs (performances) / internal costs (performances)**
- The **BOOMERANG** effect of EXTERNALIZED costs leads to aggravation of the COSTS assumed by the organization
- Outsourced PERFORMANCE can represent a performance-producing INVESTMENT that benefits the organization

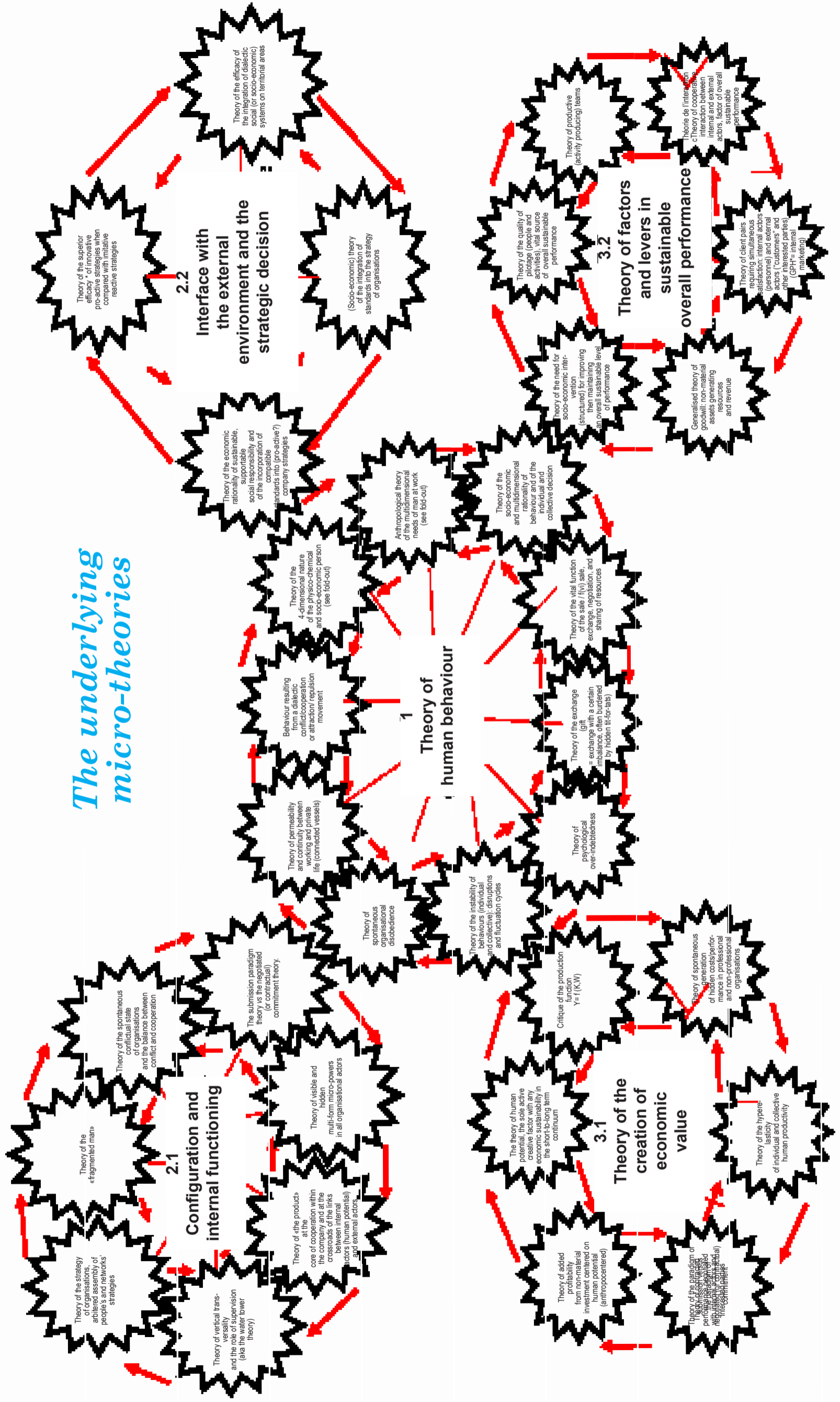
- 3/ **Indirectly productive time / Directly productive time or value of POTENTIAL-CREATING activities / value of activities yielding IMMEDIATE RESULTS**
- **NON-MATERIAL investment** indicator for the current period, enabling an increase in the effectiveness and efficiency of ensuing periods
- The current **pressure of constraints** tends to lower the numerator and thereby degrade future results: **RISK** for the survival and development of the organization

### • Result of non-material investment on profitability

The work of ISEOR in over 1.200 companies or public or private organizations (70 different sectors, great variety of sizes: 10 to 30.000 persons) **have demonstrated the very high profitability of investment in human potential**

- **Between 200% and 4,000%**
- €1 invested in developing human potential gives a ROI of €2 to €40
- **No technological investment can offer that kind of profitability**

# [Socio-economic theory of organisations]



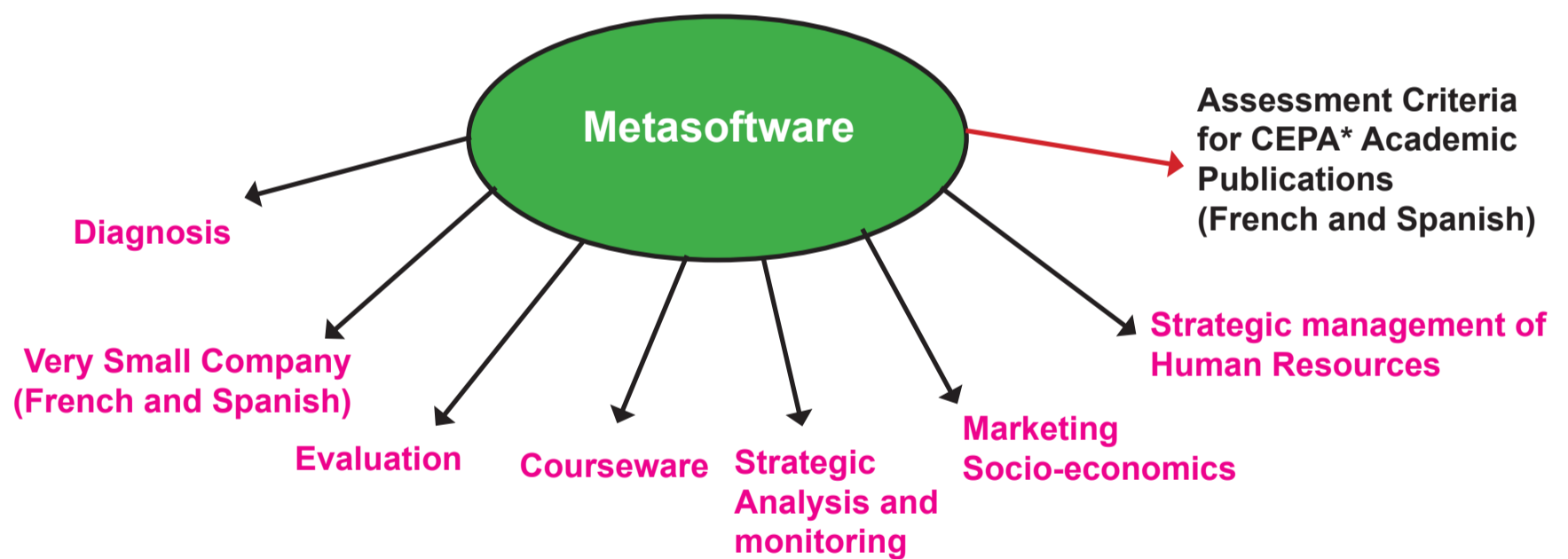
## Tools for capitalizing scientific knowledge

### The expert socio-economic management system for companies, consultants, teachers

- **SEGESE is a software package created and developed by ISEOR to help improve intervening staff's productivity and work quality, while accelerating the transmission of know-how and of the ISEOR knowledge base.**
- This software package is a **genuine decisional aid tool for consultants and intervening staff** and is based on advanced artificial intelligence techniques.

It was **devised in 1985** by Henri Savall, Veronique Zardet, and Nouria Harbi then developed with the ISEOR team.

- **These applications** aim at consultants and companies trained in the socio-economic management approach.
- **CEPA software\*** enables researchers to check their own texts before submittal for publication in reviews and helps reporters' more easily assess articles submitted to Revue Sciences de Gestion - Management Sciences - Ciencias de Gestión.



Diagnostic page printed out by the program and ready to show to interviewees at the MIRROR EFFECT meeting ↓

DDA10  
«Our function covers too many odds and ends. In project terms, it can sometimes lead to an overdose. At the end of the day we don't manage projects any more; we manage rush jobs.»

201 MPA01  
«Today I had to spend too much time on day-to-day management as there's no intermediate management.»

201 KDB06  
«We spend far too much time on administrative problems that have nothing to do with the Construction and Logistics functions.»

201 MPA01  
«Construction and Logistics is a scrambled mess: there is no method, no organisation; nothing is structured.»

← Respondents' statements, distilled from interviews with personnel and ENTERED in the program

TOPIC WORK ORGANIZATION  
DISTRIBUTION OF TASKS, MISSIONS, FUNCTIONS  
20106002 CERTAIN SECTIONS ARE BADLY structured (sometimes)

DDA10  
«Our function covers too many odds and ends. In project terms, it can sometimes lead to an overdose. At the end of the day we don't manage projects any more; we just manage rush jobs.»

MPA01  
«Construction and Logistics is a scrambled mess: there is no method, no organization; nothing is structured.»

SOP04  
«I draw up Construction budget estimates with the people in charge, I centralize and format budgets for the rest of our sections; sometimes this unplanned activity interferes with my main function of giving help.»

20106011 TOO MANY ADMINISTRATIVE TASKS (Sometimes) SOP06  
«We spend far too much time on administrative problems that have nothing to do with the Construction and Logistics functions.»

TOPIC: WORK ORGANIZATION

CERTAIN SECTIONS ARE BADLY structured (Sometimes)  
«Our function covers too many odds and ends. In project terms, it can sometimes lead to an overdose. At the end of the day we don't manage projects any more; we just manage rush jobs.»

«Construction and Logistics is a scrambled mess: there is no method, no organization; nothing is structured.»

«I draw up Construction budget estimates with the people in charge, I centralize and format budgets for the rest of our sections; sometimes this unplanned activity interferes with my main function of giving help.»

TOO MANY ADMINISTRATIVE TASKS (Sometimes)  
«We spend far too much time on administrative problems that have nothing to do with the Construction and Logistics functions.»

Respondents' statements AFTER ASSIGNMENT to the topics and key ideas of generic dysfunctions, capitalised in the program's knowledge base →



# [ Continuous training «Performance+» ]



## Professionalism of consultants and managers



**ISEOR offers three training programmes to professionals, consultants, managers and executives.**

### IN FRENCH

#### 1- Make a success of the change: tools and methods

Created on request from the Ministry of Industry, with support from the National Foundation for Training in Company Management (FNEGE) : Implement change through intervention methods and tools

#### 2- Manage the behavior in occupational environment

This training brings a very operational support in the management of the behavior in complex situation, in particular in this period of crisis which increases the phenomenon of stress and tense relations.

#### 3- Self-finance the company: the hidden resources

This training introduces the original method of the costs-values of the activities which allows to address very concretely the application of the management control strengthened by tools and socioeconomic method

#### 4-Perfect the internal consultants

This training is reserved for the consultants already trained in the socioeconomic method and establishes an advanced training course on tools and methods.

#### 5-To sell in a turbulent environment

This training is intended for the Managers Commercial, guiding Directors of sales, Directors of marketing and the research and development...

#### 6-Liven up the teams: interactive pedagogy

This training is intended for Managers, Directors and Middle Management...

#### 9-Involve the collaborators

This training is intended for the collaborators of the organizations.



### IN ENGLISH

#### 7- Vocational Training Seminar

- Training course in English of the program «Make a success of change : tools and methods»
  - Implement the change by a method and tools of intervention
    - Obtain a personalized accompaniment and a methodological assistance
    - Confront the experiences of the companies of different sizes and sectors
- ISEOR organises 2 training's sessions every year
- 2 sessions for 4 days in october and june every year
  - In the same periods as the ISEOR's Conferences

### IN SPANISH

#### 8- Programa Gestión socioeconómica

- Training course in Spanish of the program «Make a success of change : tools and methods»

#### Enquiries:

- [www.iseor.com/formations\\_consultants](http://www.iseor.com/formations_consultants)
- Subscription: [secretariat.general@iseor.com](mailto:secretariat.general@iseor.com)

# [ Franchisees and Technology transfer ]



## Thoroughness and quality control in technology transfer

**ISEOR has implemented and developed a network of franchised consultants authorized to use the socio-economic intervention method under the ISEOR banner.**

**This network exists to help with the ISEOR policy of disseminating new strategic management practices by providing a greater sample size of companies and organizations who enjoy the benefits of the ISEOR method.**

By practicing innovative interventions within companies and organizations, the franchised consultant participates in the

- transfer of experience in socio-economic management engineering and its ongoing refinement to companies
- methodical support to companies undergoing change

- ongoing input to the research centre's scientific and technical capital (enrichment of its knowledge and data bases).

**Thanks to his endorsement by an internationally reputed research centre, the franchised consultant enjoys**

- thorough quality control
- ongoing training and improvement
- competitive advantages in the consultancy market

Companies	Countries
Estudio Canllo Montoto	Argentina
Square Circle	Belgium
Maria Ángeles Rastrollo Horillo	Spain
SEAM Inc	USA (Minneapolis)
Talaszka Conseil	Francia
Recherche Scientifique en Management	Francia
LIPT	Francia
Christophe Combaudon Consulting	Francia
CAPO2	Francia
Objectif Performance	Francia
Cabinet ORGALYS	Francia
EXENH	Francia
Arturo Guerrero Lizardi	México
Julio Julián Fernández Hernández	México
Universidad de Monterrey	México
Manuel Fernando Yescas Alvarado	México
Maya E Hajjeh	Saudi Arabia
MSE France	France
MANAGINOV	France
AnD HR Solutions, LLP	Inde

22 franchised consultants  
(Argentina - Saudi Arabia - Belgium-France-Mexico-Spain United-States)



# [ ISEOR certification ]

## *Professionalism of consultants and managers*

**The issue:**  
**degradation of management methods and tools over time (organizational entropy)**

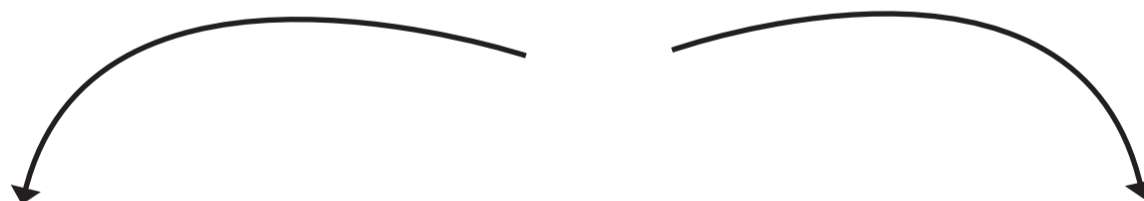
- **Objectives:**
- Encourage and support rigorous management practices
- Provide accompaniment in the ISO 9000 certification process
  - Make good socio-economic management practices a lasting concern

- Maintain know-how in companies (maintenance)
- Ensure quality in the actors' working conditions

**Three stances:**

- 1- Socio-economic management leading up to the preparation for ISO
- 2- Socio-economic management in reactivating ISO
- 3- Simultaneous socio-economic management and preparation for ISO

## Two recent pilot experiments



### **Mexican Managers (Civil Servants)**

Ministry of the "Oficialía Mayor", Government of the State of Yucatán

- General Manager
  - Managers
- Departmental heads
  - Sections

### **Internal consultants (Belgium)**

FOREM  
(Public administration of employment and training)

# [ Regulated professions -public notary, Architects, lawyers... ]



## Longitudinal research-intervention, since 1997 (15 years)

### • Objectives:

- Improve the quality of operations and management in their offices and in their service to clients
- Make the profession more attractive to young people and employees, to favor the installation of young professionals
  - Take up new challenges: increasingly competitive environment, sterner demands from customers, fragility of the offices' financial performance (property bubble)
- Accompany studies into the implementation of ISO 9000 standards (since 2004)

### • Methodology:

- 500 notarial offices employing 1 to 70 staff
  - 11 regions: urban, rural, semi-urban
- Measurement of hidden costs in each office: €15.000/person/year
- Implementation of internal and external quality plans, both medium and long term
  - Mobilization of employees, cohesion of teams
    - Improvement in the quality of service
    - Application of the HORIVERT model on a macro-economic scale to the running of a project with national scope involving 3 levels: departmental, regional, and national.



### • By request from the Higher Council of Notaries

- « Operation YOUNG PEOPLE »

- Methodological assistance in this prospecting operation
- Survey by questionnaire, with 5.000 young people, students and professionals
- Qualimetric study on the basis of 500 research-interventions in offices covering 11 regions
  - Organization of conferences-debates with young professionals, notaries, and employees for building action plans
- Innovative creation of an Advanced Diploma in Notarial Studies (“BTS”) by the CSN
- In public-private partnership: National education/Notary Schools managed by the profession
- HORIVERT intervention-research on the running of the project and the assessment of local and national cooperation between Sixth Form Colleges/Schools, and professional institutions.

### • Results for the laboratory:

#### Enrichment of the Institute's knowledge base through

- experimentation with the change process in a very high number of very small companies on a national scale
- identification of the capacity for change in a regulated profession
- contribution to the epistemology and methodology of qualimetric research

### • From 2008: partnership with the Rhône-Alpes Association of architects

- Implementation of a device of intervention-training with 10 offices of architects. The convincing results of this device led to propose, in partnership with the Rhône-Alpes Association of Architects, a Master's degree « Management of Regulated Liberal professions » at the University Jean Moulin Lyon 3.

In 2016 : Creation of a new partnership with ACTALIANS, a funding organization of trainings for regulated liberal professions, in order to accompany them in the development of their business.

# [ Public management and issues with societal scope ]



## Modernization of public services Contribution to the assessment of public policies

### • Modernization of organizations and growth of their performances

#### • Since 1979, ISEOR has intervened in many administrative bodies and organizations participating in the public service:

In the **sanitary and social sector**,

- St Etienne University Hospital – 1979
- Socio-educational establishment – 1984
- Medical-social establishment – 1988
- Clinique St Pierre – Belgium 1993
- Lyon Civil Hospices– 1996

#### • In local and regional government councils

- Amiens town council – 1985
- St-Andre-le-Côte town council – 1987
- Loire department council – 1995
- Rhone-Alpes regional council – 2002

#### • An exemplary action at the Lyon office of the URSSAF (social security contributions collection body) (1998):

advanced action toward management modernization, implementation within the Lyon pilot body of tools for dissemination to Social Security national strategy officers.

#### • Pilot actions in two Chambers of Commerce and Industry

**Bordeaux chamber:** airport, Higher School of Commerce, etc.

- **Morbihan Chamber:** port, assistance services for SMBs, etc.

#### • Pilot actions on a national scale:

- with the National Centre for the Public Territorial Function (CNFPT) – France
- with the Professional Public Training Office in Morocco [OPPT]
- with the “Oficialía Mayor” Ministry of the Government of the State of Yucatán (Mexico)

### • Contribution to issues of general interest

#### • For the development of training in working conditions in universities and higher educational institutions:

as part of the Stoleru Commission (FNEGE, 1975; Henri Savall: General Reporter)

#### • Several major French institutions that have supported ISEOR and its development through intervention-research contracts:

- National Foundation for Management Training (FNEGE), 1975-1984
- National Agency for the Improvement of Working Conditions (ANACT), 1976-1981
  - DGRST, 1976-1981
- General Economic Planning Commission, 1979
  - Ministry of Industry, 1984
  - Urban Plan, 1984
  - Construction Plan, 1984
- Ministry of Research – Prospecting and Evaluation Centre, 1987
  - Group for the Fight against Illiteracy (GPLI), 1992
- National Agency for Health Accreditation and Assessment (ANAES), 2003

#### • National level cooperation with two regulated professions:

- **Certified Public Accountants and Public Notaries:** actions covering the whole profession, at the request of the Higher Council of the Order of Certified Public Accountants, Higher Council of Public Notaries and their regional and departmental offices
  - Training actions for SMB consultants and assessment of the effectiveness of consultancy actions subsidised by FRAC then creation of the “development of the consultants professionalism programme
- Prospective studies of sectors in change: yearly University-Company symposium organized by ISEOR and proceedings published by Economica, publisher, Paris

**Invitation to the OECD annual meeting in 2011:**  
specificity of the Socioeconomic Management method as a model of modernization of public services. Presentation to the representatives of 28 participating countries of the feasible and viable strategies of innovation in public utilities.

### • FOREM (Wallon public service governing Employment and Training): a highly advanced, exemplary action in favour of management modernisation within a flagship public organisation.

#### • Longitudinal intervention-research since 2001 (8 years) in a large public administrative body.

- Training all executives, top management, and intermediate supervisors, in socio-economic management, followed by the whole of the personnel, **namely 4400 persons**

#### • Intervention across all Forem sites throughout Wallonia (Belgium)

- In-depth training by ISEOR at Lyon-Ecully of **170 executives, managers, and internal intervening staff via the training programmes**

#### • Network of 35 in-house interveners (ISEOR certified)

- Forem has negotiated with the Walloon government so that “Socio-economic management” and the “Socio-economic management control” method (and its application in analytical accounting) are featured in the current 4-year Management Contract signed between the Forem Administration and the Government of Wallonia.

- Regular talks by Forem at the ISEOR yearly Symposium; organization by the ISEOR-Forem partnership of the 2007 Symposium on “Modernization of the Public Service – the fertility of public-private partnerships”

# [ Yearly University -Company symposium ]



## Public validation and dissemination of intervention-research results

Mixed symposium of researchers and management practitioners: **METHOD for VALIDATING** scientific assumptions on conditions for the viability of effective, efficient pro-active management

• Actors in companies, public organizations, and non-profit organizations testify on the intervention-research process and observed results

• Public debate among researchers and practitioners on the refinement of methods for conducting change and accompanying strategic change in organizations

• Dissemination of the results of innovative research through papers co-authored by researchers and practitioners and published by a publisher

**ISEOR has been publishing a collection of works since 1982**

### Editions Economica



### Editions EMS

After each symposium, organised by ISEOR, either alone or in partnership with other institutions, a book is published to promote

- stimulation in companies and organizations of more pro-active, more effective, more efficient management
- increased financial and social performance, with greater sustainability
- collaboration between researchers and practitioners to produce more robust scientific management knowledge

### The following works are available at ISEOR or in bookshops

- ↘ 1982 : « Gestion socio-économique innovatrice : stratégie des entreprises et évolution des emplois » (Innovative socio-economic management: company strategies and job growth)
- ↘ 1988 : « Qualité intégrale de l'entreprise et professionnalisme des consultants (1) » (Integral quality in the company and the professionalism of consultants)
- ↘ 1989 : « Qualité intégrale de l'entreprise et professionnalisme des consultants (2) » (Integral quality in the company and the professionalism of consultants)
- ↘ 1990 : « Le conseil et l'Europe » (The council and Europe)
- ↘ 1992 : « Qualité du conseil et mutation du service public » (Quality of consultancy and change in the public service)
- ↘ 1993 : « Evolution de l'Expert-Comptable : le conseil en management » (Evolution of the Certified Public Accountant: management consultancy)
- ↘ 1994 : « L'Audit Social au service du management des Ressources Humaines » (The Social Audit at the service of Human Resources Management)
- ↘ 1995 : « Management innovant de l'hôpital » (Innovative management of the hospital)
- ↘ 1997 : « Certification, qualité et emploi » (Certification, quality, employment)
- ↘ 1998 : « PMI-PME : Le métier de dirigeant et son rôle d'agent de changement » (SMBs: the job of the director and his role as an agent of change)
- ↘ 1999 : « Le conseil aux entreprises » (Consultancy to companies)
- ↘ 2000 : « Le notariat nouveau » (The new public notary)
- ↘ 2001 : « Recherche-intervention et création d'entreprises (accompagnement et évaluation) » (Intervention-research and company creation -accompaniment and assessment)
- ↘ 2002 : « Le management des entreprises culturelles » (Management of cultural companies)
- ↘ 2003 : « Université citoyenne, progrès, modernisation, exemplarité » (Citizen's university, progress, modernization, exemplarity)
- ↘ 2004 : « Mutation stratégique des chambres de commerce et d'industrie » (Strategic change in Chambers of Commerce and Industry)
- ↘ 2005 : « Enjeux et performances des établissements sociaux : des défis surmontables ? » (Issues and performance in social establishments: surmountable challenges?)
- ↘ 2006 : « Le management du développement des territoires » (Management of the development of territories)
- ↘ 2007 : « L'hôpital et les réseaux de santé » (The hospital and healthcare networks)
- ↘ 2008 : « Modernisation des services publics – Fécondité du partenariat public/privé » (Modernization of public services – Fertility of the public/private partnership)
- ↘ 2009 : « Management socio-économique : une approche innovante » (Socioeconomic management: an innovative approach)
- ↘ 2010 : « Le management stratégique des professions libérales réglementées » (Strategic management of regulated liberal occupations)
- ↘ 2011 : « Réussir en temps de crise. Stratégies proactives des entreprises » (Succeed in times of crisis. Proactive strategies of companies)
- ↘ 2012 : « Entreprises familiales : création, succession, gouvernance et management » (Family companies: creation, succession, governance and management)
- ↘ 2013 : « Réindustrialisation et dynamisation multi-sectorielle » (Reindustrialization and multi-sectorial energization)
- ↘ 2014 : « La conduite du changement dans les entreprises et les organisations » (The change management in companies and organizations)
- ↘ 2015 : « Gouvernance et management : quelle coopération ? » (Governance and management: what cooperation?)
- ↘ 2016 : « Entreprises, valeur(s) et prospérité » (Companies, value(s) and prosperity)
- ↘ 2017 : « Innovation commerciale : tous vendeurs dans les organisations » (Commercial innovation: anyone is seller in organizations)
- ↘ 2018 : « La digitalisation apprivoisée : Au service de l'humain et de la performance durable »

## Partnership for a socio-economic policy for proper employment

- The ILO is interested in ISEOR's work because it deals with universal issues affecting social standards, especially
  - training
  - qualifications
  - illiteracy
  - discrimination
  - health and safety at work
  - working conditions
  - real wages
  - employment
  - personal expression
  - remunerations

• The ILO considers the concept of socio-economic management to be a contribution toward resolving these issues.

*"Full development of the human resource potential that a person represents through his/her contact and collaboration with his/her working colleagues is at the very least initiated. The spirit of participation feeds on personal interest, widely and concretely understood: service to the company converges with service to all the people it unites.*

*That's the hope put forward by Henri Savall when recommending use of the "periodically negotiable activity contract", which when faithfully followed and in the best cases (1), will raise work in dignity from instructed to freely consented".*

*(1) Routine optimism based on poor information has no place in Henri Savall's mindset.*

**François PERROUX**  
 Honorary professor at Collège de France, Chairman of the Institute of Mathematical Sciences and Applied Economics.  
 (Preface to the book "Rebuilding the Company", 1979)

*"This is why I express the wish that bosses and trade unionists alike grasp the tool proposed by Henri Savall and experiment with it. This would without doubt be the best possible test."*  
**Jacques Delors** (Preface to the book "Enriching human work", 1975).

- Several flagship actions jointly undertaken with the Employers' Bureau of the ILO
  - The only management theory published by the ILO (in 2000, republished in 2008).



2008, news publications

- A new research programme on tetranormalization and the incorporation of social standards and norms into company strategies, launched in 2004.
- A presentation of socio-economic management in the encyclopaedia "Management Consulting. A guide to the Profession", published by the ILO in 1996.
- Pilot actions involving training of executives and experts and intervention-research, carried out in Vietnam and Colombia on request from the ILO.
- 2008: Intervention of the International Labour Office to the Socioeconomic Management Festival organized by the ISEOR on sustainable companies.



Editions IAP, Charlotte, USA. 2012

# [Belgium - Wallonia]

## Pilot country



## Development of sustainable financial and social performance

### ISEOR practises widespread intervention in Belgian and Walloon companies and organizations.

Application of the ISEOR socio-economic method has been the subject of intense investment in Belgium since the 1990s.

- Partners: pilot Belgian companies: FOREM and TECHNORD
- Yearly ISEOR symposium: «Modernization of public services - public/private partnership», organized in partnership with FOREM in November 2007, the latter having published an article in his magazine on the socio-economic management implemented in the Paul Bocuse Institute.

REGARDS<sup>[2]</sup>  
sur l'emploi et la formation  
Le magazine du Forem | Trimestriel | Avril/mai/juin 2008 | Numéro 18



### In the Paul Bocuse Institute, cooking and management are good housemates.

Testimony from the Paul Bocuse Institute's general manager Hervé Fleury, who has been applying ISEOR socio-economic management methods since 2006. Extracts from the article written in "Regards", the Forem (Belgium) magazine, June 2008.

*"The socio-economic model seems compatible with our objectives. We started from the principle that to obtain quality training, we must count on effective teachers who are totally dedicated and available passing on their know-how and teaching. Furthermore, to plan what we do with our employees for the next 10 years, we must unite all the actors around a common project. The way the ISEOR model takes account of management in both its social and financial aspects pleased me ... in so far as it proposes a return on investment based on the search for hidden costs caused by organizational dysfunctions. The ISEOR method begins with an audit and a financial assessment of dysfunctions. This requires gaining employees' confidence so they feel able to explain which practices cause problems, and it requires determination from the manager, who must be able to keep on listening. The exercise provided the basis for an excellent reappraisal of the whole organization.*

*Besides this initial audit, the socio-economic model comprises a battery of tools, since progress must be accompanied by measurement of performance. The tools developed by ISEOR might at first sight seem subtle and complex. There are three basic concepts in socio-economic management: quality, quantity, and economy. Each must be routinely taken into account.*

*Some of the changes we have implemented are the monitoring of the organization and the coordination of training, which showed a quality deficiency due to excessive tasks being entrusted to a single team. We therefore decided to share the tasks out differently. This provided a gain in effectiveness and in the quality of accompaniment.*

*Change has not been easily accepted by employees. Some of the team experienced it as a kind of dispossession. In January, 2008, we implemented the "Periodically Negotiated Activity Contract" affecting all employees. Each of them put forward an action plan which was then officially validated. Depending on the financial results of this (based on measurable criteria), the employee can enjoy a bonus of up to 5% of his yearly pay. I started by upholding the principle that this bonus must not represent an extra cost for the company, rather a gain linked to the elimination of dysfunctions. The elimination of such dysfunctions produces added effectiveness, added economy, added motivation, and in the end, added overall quality, with impact in both the financial and social realms. To conclude, these tools became common to all staff. Every time we implement an action, we calculate the financial balance (financial consequences versus measurable consequences of the action on quality and quantity). Certain tools are even transferred (as far as methods go) to our students. Thus second year students, one of whose tasks is to create a project, have drawn up a competency grid showing which shortcomings must be taken care of. It's a lot easier to conduct a project when strengths and weaknesses are known."*

Company or organization	Business sector
ACCESS SECURITY	Security system installation company
ACTIONS INTÉGRATION	Tourist organization
BELSIM	Software engineering company
BLONDIAU	Certified Public accountants
CEQUAL	Training and promotion of quality
Clinique Notre Dame de Tournai	Private healthcare establishment
CLINIQUE ST-PIERRE	Non-profit making hospital
Confédération des Syndicats chrétiens	Trade union
CRIF	Technological study and counselling center
KMM Matériaux	Materials trading company
LE FOREM	Job training and employment organization
LEPOT BIGMAT	Building and do-it-yourself materials trading company
MANPOWER - BELGIUM	Temporary staff and outsourcing
MUTUALITÉ CHRÉTIENNE	Health insurance organization
SCI INFORMATIQUE	Service providing company
TEC HAINAUT	Public transport company
TECHNORD	Group of SMBs specializing in industrial IT and electrics
THERMIBEL	Manufacture of heat sensors
TOP TIPS	Manufacture of cotton buds
VOYAGES COPINE	Travel services company
DEFI PLUS	Association for insertion and development of employment
NIJOLI	Reception and educational monitoring of children
MIRHO	Training and job insertion organization
ESPACE SANTÉ	Sale and hire of medical equipment and optical center
SAINT GEORGES	Reception home for the elderly

**25** companies or organizations practice socio-economic management



# [Mexico Pilot country]



## Development of sustainable financial and social performance and technology transfer

- **Creation of a robust network**
- of academics, companies, consultants

### Expanding ISEOR intervention in Mexican companies and organizations since 1995

ISEOR is developing intervention-research among Mexican SMBs and capitalising new experiences in the modernization of public services.

- Three very active franchised consultants
  - **Tools available to them**
    - Horivert multi-SMB
    - Training of consultants
  - 2 University-Company symposia: Mexico City in 2000, Merida in 2004

### A pilot partnership has been signed and developed with the State of Durango

- (Consejo de Coordinación Empresarial y Secretaría de Desarrollo Económico): these pilot actions consist of implementing socio-economic management by groups, each comprising 5 or 6 SMBs, through training and technology transfer actions.
- 4 groups formed since 2005, 20 SMBs involved.

• **Vast network of SMB consultants** over the whole of Mexico: pilot partnership with COMPITE (Offshoot of the Federal Economy Ministry)

### • Technology transfer with 6 COMPITE consultants and SMBs from 5 different Mexican states.

- This transfer has been the subject of support from the European Union (Strategic Alliance programme). A multi-year extension agreement to 50–100 SMBs from different Mexican States is in the process of preparation with COMPITE for developing socio-economic management applications.

32

### Mexican companies or organizations practice Socio-economic management (SEAM)



Region	Company or organization	Business sector	
DURANGO	AGN AVIATION SERVICES	Airport services	
	ALEJANDRO WALLANDER HERNÁNDEZ	Manufacture of dairy products	
	BOTANAS HEBI	Production of appetizers	
	CREMERÍA WALLANDER	High class grocery	
	DISA CONSTRUCCIONES	Public heavy construction work	
	DISTRIBUIDORA VELA	Trading in maintenance products	
	EDITORIA Y PRODUCTORA DURANGO	Regional press	
	HOTEL SANTA CRUZ	Hotel-restaurant	
	INDUSTRIAS FORESTALES SAN IGNACIO DURANGO	Furniture manufacture	
	LAVANDERÍA MODERNA	Industrial laundry	
	MADERAS NUEVA VIZCAYA	Production and sale of furniture	
	MUEBLES VIZCAYA DE DURANGO	Furnishing sales	
	SUPER SERVICIO ARRIETA	Filling station	
	BAJA CALIFORNIA	INTEGRACIÓN AUTOMOTRIZ	Car repair
	HIDALGO	GRUPO GENISA	Hotel-restaurant group
		TRICO PACHUCA	Production and sale of bakery products
MEXICO DF	GRUPO INTERASESOR DE MENSAJERIA	Courier services	
	UNIVERSIDAD AUTONOMA METROPOLITANA	Public university	
MICHOACAN	AGUACATES SÁNCHEZ HASS	Production and sale of fruits	
	EMPAQUE SAN JOSÉ	Production and sale of fruits	
	GOLDEN GATE TRANSMISIONES AUTOMÁTICAS	Car repair	
OAXACA	PAULINA YOUTH HOSTEL	Youth hostel	
VERACRUZ	BIMBO DEL GOLFO	Food processing company	
	EMPACADORA DEL GOLFO	Packaging	
	GALLETERA VERACRUZANA	Food processing company	
	PRINVER	Oil and geothermal industry	
YUCATAN	TAMSA	Oil industry	
	EL RETORNO	Industrial bakery	
	GOBIERNO DEL ESTADO DE YUCATAN	Public administration	
	INSTITUTO PARA LA EQUIDAD DE GENERO	Public administration	
	IMPULSORA PEXTEL	Textile and clothing manufacturing company	
MEXICO DF	PRODUCTOS ALIMENTICIOS CARDIN	Food and packaging industry	
	UPRH - SECRETARY OF FEDERAL PUBLIC SERVICE	Public administration	

### • Pilot socio-economic management actions across the whole of the “Oficialía Mayor” ministry of the government of the State of Yucatán.

From 2003 to 2006, the Oficialía Mayor of the government of the State of Yucatán implemented the socio-economic management model with support and methodological assistance from ISEOR. In March, 2006, this ministry and all its components received ISEOR certification in Socio-Economic Management from Lyon.

### • Socio-economic management pilot actions developed in SMBs in Merida, State of Yucatán, (food processing, textiles) since 1998.

# [Mexico Pilot country]



## *Intensive international academic cooperation since 1995*

- **Creation of a highly active network of 12 partner universities**

- Universidad Autónoma Metropolitana de México (UAM)
  - Instituto Politécnico de México (IPN)
  - TEC de Monterrey (Monterrey)
- Universidad Autónoma de Hidalgo (Pachuca)
  - Universidad de Guerrero (Acapulco)
  - Universidad de Sinaloa (Culiacán)
- Universidad Autónoma de Yucatán (Mérida)
- Universidad de Aguascalientes (Aguascalientes)
  - Universidad de San Luis Potosí
  - Universidad de Guanajuato
  - Universidad de Veracruz
  - Universidad de Monterrey



- **Partnership agreements between UAM, ISEOR, and the Jean Moulin Lyon 3 University**

- **7 doctorate theses co-sponsored by UAM and Jean Moulin Lyon 3 University**
  - supported in Mexico from 2004 to 2007.
  - 3 doctorate theses from a UAM professor supported in Lyon in 2006.

- **The number of Mexican doctors is on the rise**

- ISEOR doctorate Training of 13 university professors:
  - UAM, Mexico; Yucatán; Veracruz; Hidalgo; San Luis Potosí

- **Partner institutions:**

**French Embassy in Mexico, Conacyt, Anuies**

- **Creation of “François Perroux” chair in management sciences on the initiative of the French Embassy and ISEOR**

**A network of 4 Mexican universities receive conference speakers from France every year**

- Mexico Independent Metropolitan University
  - Guerrero Independent University
  - Sinaloa Independent University
  - Yucatán Independent University
  - with ISEOR as the scientific adviser

- **10 speakers received from 2005 to 2008,** teachers-researchers in management science from CNAM (Paris) and the Universities of Besançon, Lyon 3, Montpellier 1, Montpellier 3, Nice, and Strasbourg 3.

- **The synergy between ECOS Nord projects and the François Perroux chair** has contributed to a growth in dynamic cooperation within the network of Universities.

- **Ecospole Nord international Programme**

- **Two successive bilateral cooperation projects involving ISEOR and the LIMSE team from UAM** have enjoyed the support of the ECOS Nord programme (French Embassy – ANUIES):

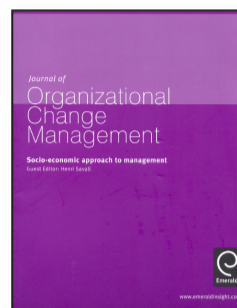
- **First project (2000 – 2003) entitled “Creation of potential and financial and social development in Mexican organizations** - experimentation with the participative change process”, centered on the development of performance in Mexican SMBs. An international symposium co-organized by UAM and ISEOR in November, 2000, in Mexico.

- **Second project (2004 – 2007) titled “Sustainable socio-economic development of Mexican companies and organizations and proactive change strategy”** centered on the development of human potential in companies. This project contributed to the creation of a network of 5 Mexican universities for the development of a common research programme in the States of Yucatán, Hidalgo, Guerrero, Sinaloa, Aguascalientes, and in Mexico City.

## Exportation of French research

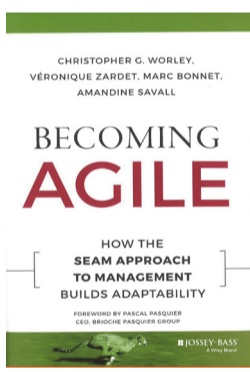
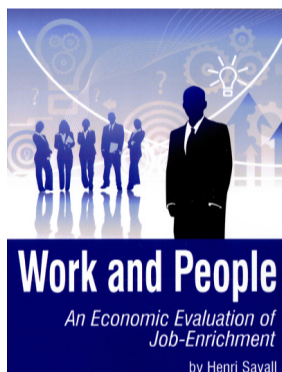
### Publications

- Several works entirely dedicated to socio-economic management have appeared in both the USA and France
- In the USA, works relating to the socio-economic theory were first taken account of in 1981, with the first publication of Henri Savall's doctoral dissertation "Work and People: a financial Assessment of Job Enrichment", preface by H.I. Ansoff (founder of the "strategic management" concept). Published by Oxford University Press of New York, this is a translation of his 1974 complementary thesis sponsored by the University of Paris-Dauphine and published in French by Editions Dunod and titled "Enriching human work in companies and organizations".

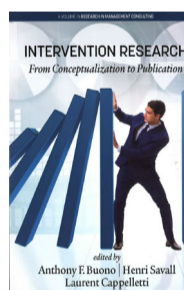


- The second step was broached when Prof. David Boje (NMS University, USA), manager of the prestigious "Journal of Organizational Change Management" review, Emerald, 2003, dedicated a special edition (very rare for a theory coming from outside the Anglo-Saxon world) to the socio-economic model created by Henri Savall and developed by ISEOR.

- The socio-economic model is the only management theory endorsed by the ILO (Geneva, 2000, 2008). It has been published simultaneously in English, Spanish, and French for the attention of the directors and management of small and medium sized companies.



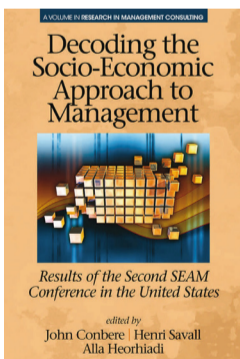
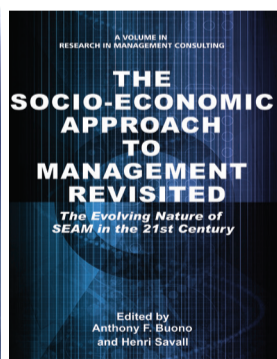
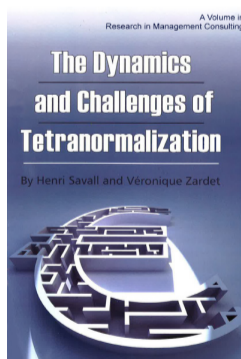
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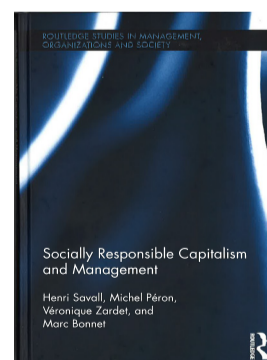
By Anthony F. Buono, Henri Savall, Laurent Cappelletti  
 Intervention Research: From Conceptualization to Publication continues to build on the relationship between the Research in Management Consulting series and the intervener-researchers at the Socio-Economic Institute for Firms and Organizations (ISEOR) in Ecully, France, extending that partnership to our recent work with the French Foundation for Management Education (FNEGE), a foundation dedicated to closing the gap between the teaching and practice of management in France.



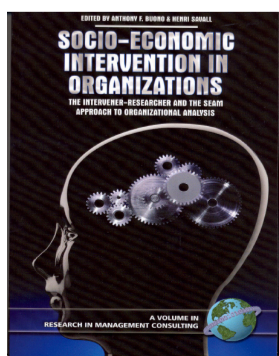
Par Henri Savall, Michel Péron, Veronique Zardet, Marc Bonnet  
 This volume is part of an ongoing partnership between the *Research in Management Consulting* book and the Socio-Economic Institute for Firms and Organizations (ISEOR), located in Ecully, France, on the outskirts of Lyon.



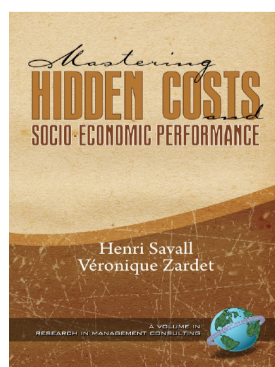
Edition USA  
 Books of the SEAM in USA  
 2015, 2016 & 2017



By Henri Savall, Michel Péron, Veronique Zardet, Marc Bonnet  
 In the current crisis context, capitalism is questioned by its detractors or defended by its partisans. The concept of Socially Responsible Capitalism (SRC) is based on the entrepreneurial spirit.



The idea for this book was born out of a meeting with Professor Anthony Buono (Bentley College, Boston, USA) initiated by ISEOR. Given the non-existence of any work similar to ISEOR's in the USA, Prof. Anthony Buono proposed writing and coordinating the publication of this book. It is therefore the result of an audacious strategy named "Operation Lafayette", which inspired collaboration between ISEOR and American academics through a scientific dialogue based on original ISEOR research and not on the application of Anglo-Saxon models. This original book comprises 18 previously unpublished chapters dedicated to topics and cases in different private and public business sectors: four were written by American professors, one by a Mexican professor, and thirteen by ISEOR teacher-researchers.



This book is the English translation of a work by Henri Savall and Veronique Zardet titled (translation) "Controlling hidden costs/performances" and published in 1987 by Financiala (Harvard Prize for Expansion of Strategic Management). The preface is written by Prof. Anthony Buono of the University of Bentley College, Boston, USA. This book is the first of a series on Management Research and consultancy. In the light of the numerous problems a companies face, the idea is to be able to provide solutions in the field of change management by the application of socio-economic management. Through this work, teacher-researchers, independent consultants, and company directors can find explanations and answers to the problems of governance and conducting change.



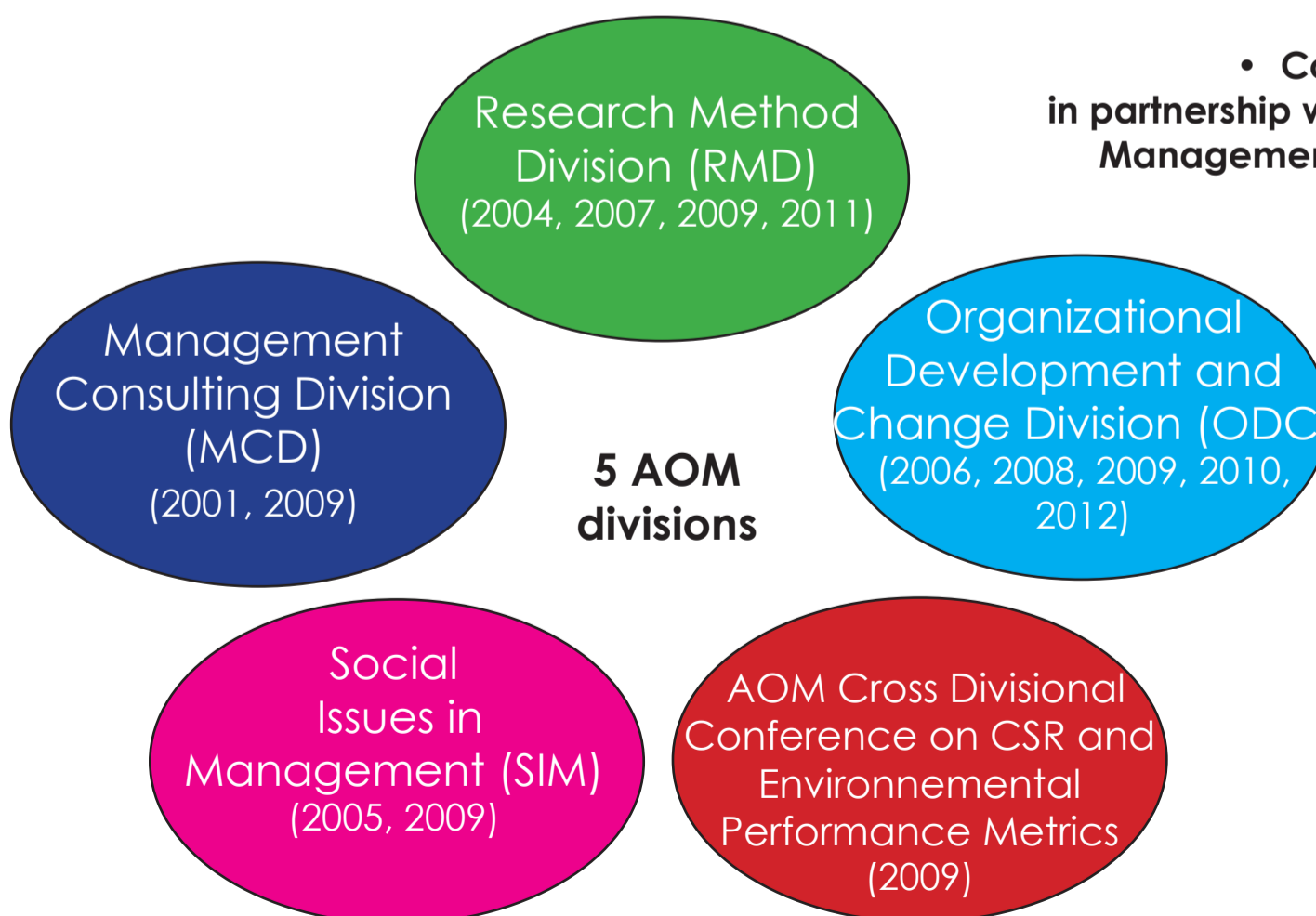
## Partnership with the Academy of Management (AOM)

- ISEOR has developed a strong partnership with the Academy of Management since 1998
- The goal of this highly renowned international institution is to promote the value of high-quality managerial research worldwide. It has over 13,000 members.

### ISEOR has organized 17 brand new symposia with the Academy of Management in Lyon

It was through a partnership with ISEOR that the Academy of Management first came to France

### Contribution to transversality within the Academy of Management



### • 90 papers and articles from ISEOR members at the yearly Congress of the Academy of Management since 1998

(congresses held in San Diego, Chicago, Toronto, Seattle, Denver, New Orleans, Honolulu, Atlanta, Philadelphia, Anaheim)

### • Several Academy of Management distinctions and prizes have been awarded to ISEOR,

including an "Award" for the transversality of projects conducted by ISEOR within the AOM

### • Institutional responsibilities within the Academy of Management

- Marc Bonnet
- Rickie Moore
- Laurent Cappelletti

### • In 2009

- Conference organized by the ISEOR in partnership with 6 Divisions of the Academy Of Management (MC, ODC, ONE, RMD, SIM, PTC)

### • Since 2013

- An annual Conference dedicated to SEAM organized in the USA. The 5th one took place in May 2017

## *Partnership in international academic cooperation*

- **Top-ranking partner institutions:**
  - Academy of Management (AOM)
  - American Accounting Association (AAA)
- **Co-leadership of the International Doctoral Consortium (ODC/AOM)**  
Benedictine University, Chicago and ISEOR, Lyon
- **An academic network of reputed partners**
  - Benedictine University, Chicago
    - Bentley University, Boston
    - Central Michigan University
  - New Mexico State University, Las Cruces
    - Pepperdine University Los Angeles
    - Saint Scholastica College, Duluth



- **A network on the tetranormalization**
- **Teaching of Socio-economic Management**
  - MBA at Central Michigan University
  - New Mexico State University Masters
    - PhD. Benedictine
- The students carry out work on the application of socio-economic management in US companies, with participation from their professors trained by ISEOR in Lyon-Ecully.
- **1 co-sponsored thesis supported (US PhD + french PhD)**

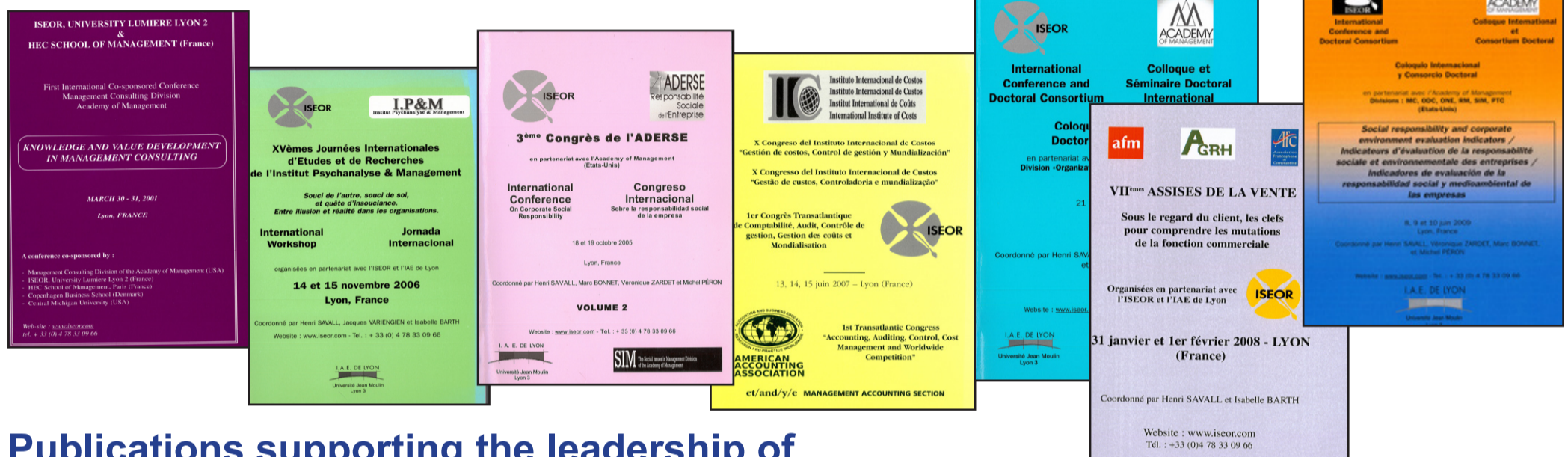
# [Scientific leadership of the International Academic Community]



## Trilingual cooperation and dialogue strategy (French, English, Spanish)

By developing its international academic network, ISEOR enables massive dissemination of a large number of communications and articles.

Following the symposia, seminars, and festivals ISEOR organizes either alone or in partnership with other Academic institutions, full accounts of the papers presented at these events are published in 3 languages, (French, English Spanish).



## Publications supporting the leadership of the International Academic Community:

- ✓ 2001 : ISEOR Symposium / Academy Of Management / Management Consulting Division: Knowledge and value development in management consulting
- ✓ 2004 : First ISEOR Symposium / Academy Of Management / Research Methods Division: Crossing borderlines between qualitative and quantitative - research methods
- ✓ 2005 : ISEOR Symposium / Academy Of Management / ADERSE Congress: Social responsibility of companies
- ✓ 2006 : Symposium / Psychoanalysis and Management Institute Congress: Concern for others, self-concern, and the search for non-concern. From illusion to reality in organizations)
- ✓ 2006 : First ISEOR International Doctoral Symposium and Seminar / Academy Of Management Organizational Development and Change Division
- ✓ 2007 : Second ISEOR Symposium / Academy Of Management / Research Methods Division: Methods of innovative research for creating valid, applicable knowledge
- ✓ 2007 : ISEOR Symposium / Congress of the International Institute of Costs: 1st transatlantic congress of accounting, auditing, management control, and globalization)
- ✓ 2008 : Second ISEOR International Doctoral Symposium and Seminar / Academy Of Management: Organizational Development and Change Division
- ✓ 2008 : ISEOR Symposium / Lyon IAE Business School: 7th sales conferences: under the watchful eye of the client, the keys to understanding changes in the sales function
- ✓ 2009 : Conference and doctoral seminar international ISEOR/Academy Of Management : Social Responsibility of Companies - CSR
- ✓ 2010 : 2nd international Conference ISEOR/Academy Of Management (ODC)/Institut International des Coûts/American Accounting Association: «Accounting, audit and management of costs confronted by globalization and Tetranormalization» / «Organizational Development and Change»
- ✓ 2011 : Third International Conference ISEOR/Academy Of Management/Research Methods Division: Impacts performance metrics of management research
- ✓ 2012 : Fourth International Conference and Doctoral Consortium ISEOR/Academy Of Management: Organizational Development and Change Division
- ✓ 2013: 3rd Conference ISEOR and American Accounting Association and the International Institute of Costs: «Accounting, Auditing, Financial Control and Cost Control»
- ✓ 2014 : International Conference ISEOR/Academy Of Management/MC & ODC Divisions: «Current Challenges in Organizational change and interventions»
- ✓ 2015 : International Conference ISEOR/Academy Of Management/ RMD Division: «Sharing on research methods across a variety of countries and cultures»
- ✓ 2016 : International Conference ISEOR/Academy Of Management/ MC & ODC Divisions: «Organizational Development & Change / Management Consulting»
- ✓ 2017 : 15th International Institut of Costs Conference (IIC) & 4th Transatlantic Conference: «Accounting, Auditing, Financial control and Cost Control»
- 21 2018 : International Conference ISEOR/Academy Of Management/ ODC Division: «Organizational Development & Change / Management Consulting»



Since 2010 the proceeding of conferences are on CD-ROM



Since 2016 the proceeding of conferences are on USB key

## *Auditing, accounting, control, cost management*

### 15 countries represented

- Argentina
- Belgium
- Brazil
- Canada
- Columbia
- Cuba
- Spain
- The United States of America
- France
- Ireland
- Mexico
- Portugal
- Switzerland
- Uruguay
- Venezuela

■ IIC: large network of academics and experts specializing in auditing, accounting, cost control, and management

■ Partnership with the American Accounting Association (AAA)

- In June, 2007, 2010, 2013 and 2017 ISEOR organized a congress in Lyon in partnership with the IIC and the AAA, on “The globalization of costs”
  - 500 participants or so
  - 320 papers
  - 3 days of conferences
  - 23 countries represented
- 4 languages: French, English, Spanish, Portuguese
- In June, 2010, ISEOR organizes the 2nd transatlantic congress and the 3rd doctoral colloquium / seminar coupled in Lyon in partnership with the AOM / IIC / AAA.
- About 600 participants on 3 days of conferences and 276 communications
- In June, 2013, ISEOR organizes the 3rd transatlantic congress in Lyon in partnership with the IIC / AAA.
- About 269 participants on 3 days of conferences and 185 communications
- In June, 2017, ISEOR organizes the 4th transatlantic congress in Lyon in partnership with the IIC / AAA.
- About 330 participants on 2 days of conferences and 230 communications

# [ Mexico - Spain and Latin America ]



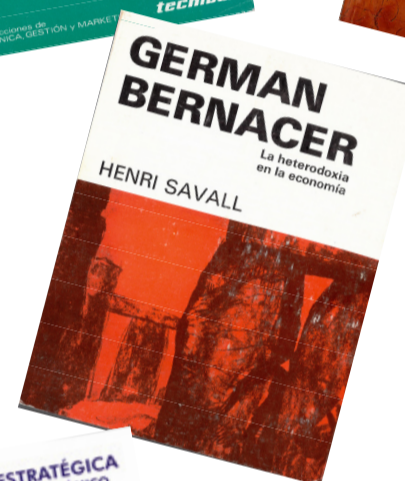
## Exporting French research Publications

- **Several works in Spanish,  
published in Spain and Mexico**

- **1977 and reediting in 2011:** “Por un trabajo más humano”, Ediciones Tecnibán, Madrid (1977) and IAP Editions, USA (2011) – Translation of Henri Savall’s complementary thesis “Enriching human work”, supported in 1974 at Paris-Dauphine University – IAE Management prize, published by Dunod, 1975, then Economica, Paris, 1989.



- **1983:** “Germán Bernácer: la heterodoxia en la economía”, Alicante, España: Publicaciones del Instituto de Estudios Alicantinos – Translation of Henri Savall’s economic science thesis supported in 1973 at Paris 2–Pantheon Assas University, prize for best theses; published by Dalloz en 1975 (Collection des Grands Économistes), with support from the CNRS.



- **2008:**  
Translation of the book “Strategic Engineering of the Reed” by the Academic Presses of Mexico City’s Universidad Autónoma Metropolitana (UAM)



- **2000, then 2008:** The socio-economic model is the only management theory endorsed by the ILO (Geneva), published simultaneously in Spanish, English, and French for the attention of executives and management in small and medium sized companies.



- **2000, then 2004:** Publication of two collective works coordinated by Margarita Fernández Ruvalcaba (UAM – Mexico) and Henri Savall respectively and by Henri Savall and Veronique Zardet, accounts from two University-Company Symposia organized in Mexico City DF (2000) and Merida (2004).



↘ Enquiries and orders:

- [www.iseor.com/tetranormalization](http://www.iseor.com/tetranormalization)
- [secretariat.general@iseor.com](mailto:secretariat.general@iseor.com)



# [ An International Network Of Doctors In Management



- **166 from all over the world doctors have been trained by ISEOR**
  - in 15 countries

“International Festival of Socio-Economic Management”, organized by ISEOR, in partnership with Lyon IAE business school, from 23rd to 25th October, 2008.

- Accessible on the ISEOR site

A catalogue of all these theses was published on the occasion of the innovative



➤ Further information:  
• [www.iseor.com/Réseau international des docteurs de l'ISEOR](http://www.iseor.com/Réseau international des docteurs de l'ISEOR)

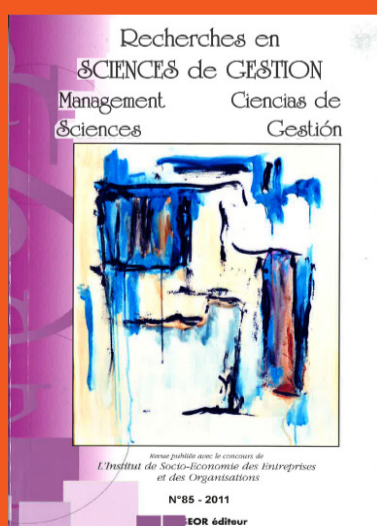
# [ «Recherches en Sciences de Gestion - Management Sciences - Ciencias de Gestión», Journal ]



## *Dissemination of innovative research from the international academic community*

### **127 issues published in 40 years, presenting first-time articles on Management Science.**

- “Recherches en Sciences de Gestion – Management Sciences – Ciencias de Gestión” Journal, is the only international management that routinely publishes first-time articles in the 3 main international languages.
- **Starting 1978**, Henri Savall created the “Revue de Sciences de Gestion” review as part of the “Economies et Sociétés” collection, founded by Professor François Perroux, the founding chairman of the ISMEA Institute of Economic Sciences (Paris).
- **6 issues** of “Recherches en Sciences de Gestion - Management Sciences - Ciencias de Gestión” Journal are published every year in 3 languages (French, English, Spanish)
- **First-time articles validated** by 3 scientific committees (French, Spanish, and English speaking)
- **First-time articles selected for their ground-breaking, methodological approach** from a large number of teaching and research centers on different continents.
- **CD-ROM of articles (1978 to 1998)** from “Revue Sciences de Gestion - Management Sciences - Ciencias de Gestión” available
- **850 articles** published so far (for impartiality reasons, only 15 of these are from ISEOR).
- **In 2008**, three special numbers were published for the 30th anniversary of the Journal (N°64, 65, 66)
- **In 2011** : Restructuring of RSDG reviews «Recherches en Sciences de Gestion-Management Sciences-Ciencias de Gestión» to avoid any confusion with other reviews in the same field and faced with the emergence of numerous management journals we have decided to reorganize the title of our review



- **In 2018** : According to the evolution of new technologies and the spread of digital formats, we made the decision to edit our academic review in electronic format instead of the printed one.

#### ➤ Enquiries and orders:

- [www.iseor.com/publications/Recherches en Sciences de Gestion](http://www.iseor.com/publications/Recherches%20en%20Sciences%20de%20Gestion) or [secretariat.general@iseor.com](mailto:secretariat.general@iseor.com)

# «Recherches en Sciences de Gestion - Management Sciences - Ciencias de Gestión», Journal



Three scientific committees head the publication of «Recherches en Sciences de gestion - Management Sciences - Ciencias de gestión», Journal

154 professors from Universities and Business Schools in 16 countries participate in in-depth scrutiny and selection of large number of articles contributed

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# [ French language Tetranormalization ]



## *New programme for the next 10 years*

### **The French language Tetranormalization network is comprised of**

- Academics, professors from higher business schools, intervening researchers, etc.
- An extensive network covering the whole of France
  - 13 towns represented
- **17 partner universities and business schools:**
  - Bordeaux School of Management
    - CNAM, Paris
  - Jouy-en-Josas Group of the HEC business school
    - Euromed
  - University of Franche Comté
    - Catholic University of Lyon
      - University of Corsica
  - Jean Moulin Lyon 3 University
    - Montpellier 1 University
    - Montpellier 2 University
    - Montpellier 3 University
      - University of Nice
      - University of Orléans
  - University of Paris Dauphine
  - University of Pau and the Adour region
    - University of Poitiers
    - University of Strasbourg
  - **IAS, AGRH, AFC, AFM, ADERSE:**  
in each association, a Tetranormalization work group is set up with network members.



\* There are two other networks, the latin one (Mexico, Argentina, Brazil, Spain, Portugal) and the US network.



# [Friends of François Perroux Association]



## Disseminate the thoughts and works of the great French economist F. Perroux

- **Creation of the Friends of François Perroux Association in 1985 by Prof. Gilbert Blardone and of the François Perroux Foundation in 1989, presided by Prof. Raymond Barre.**
- **Since 1998, the Friends of François Perroux Association has**
  - **been presided by Henri Savall.**
- **The “François Perroux Days”**
- **1985 :** with the participation of François Perroux himself as well as Raymond Barre on the topic of “Defeating Unemployment”.
- **1990 -1994 :** the yearly François Perroux Days are inaugurated and cover the following themes: “Europe without shores”, “Peaceful coexistence”, “The region as a motive force”, “International exchanges and globalization”, “Social protection, exclusion, and employment”, “Review and forward view of world development”
- **1995 :** at the Institute of Applied Mathematical and Economic Sciences, a day was presided by Raymond Barre and Gilbert Blardone on the subject of “Remuneration for work, social protection, and employment: review and forward view”.
  - **2002 :** 9th François Perroux day: “Tamed globalisation”.
- **2004 :** François Perroux Centenary Symposium on the theme of “The thoughts of F. Perroux in the light of today’s European and world problems”.
  - **2008 :** Symposium on the topic of “How to live together: economic conditions for democracy”, with the participation of Prof. Maurice Allais (French Nobel Price of Economics)
- **2010:** 12th Seminar « Act in a new world: the development and the costs of Man ». Tackled issues showed the various current researches for experts, academics and researchers on the human value, the essential notion in this period of deep crisis
- **2011:** François Perroux Seminar « Endogenous territory Development». Innovations and potential of endogenous development in territories: states, countries, municipalities and big European spaces.
- **2012:** F. Perroux Seminar organized to ESC Clermont-Ferrand
  - **2013:** François Perroux Seminar in France (Strasbourg) on the theme « Competitiveness and economic activity. What future for France and Europe? »
  - **2016:** François Perroux Seminar in Lyon on the theme « The Europe engine of the diversity »

### • Several publications relating to François Perroux:

- François PERROUX – Collection directed by François DENOËL, Les Dossiers H Collection, published by “L’Age d’Homme”, Lausanne, Switzerland (witnesses’ accounts followed by a biography and bibliography).
  - François PERROUX – “Towards transcending the two main currents of economic thinking: the work of François Perroux”, by Henri Savall in “Encyclopedie de l’Économie”, published by Larousse, Paris, 1978.
  - Economist, Humanist, and Christian: François PERROUX by E. Poulat, G. de Bernis, H. Bartoli, L. Boongonda, G. Gaburro, T. Leray, Notes et Documents Review No.26, Sep-Oct 1989, Jacques Maritain International Institute, 33 via Quintino Sella, 00.187 Rome.
- “François PERROUX, a thinker of our time” by R. Gendarme; G. Matagrin; R. Leray; A. Losser; A. Chabert – Nancy – Presses Universitaires – 25 rue Baron Louis – 54000 NANCY.
  - Tribute to F. Perroux published by Presses Academiques de Grenoble, 1977, 748 pp
  - François PERROUX, Grenoble Faculty of Economic Sciences, Economic studies and works, No.7, BP 47 X 38040 Grenoble Cedex.
  - The general Economic theory of François Perroux by Ducarmel Bocage, published by University Press of America, 4720 Boston Way-Lanham, MD 20706

### • François Perroux, a visionary and a scholar

*Born in Lyon in 1903, Perroux became successively Professor of Economics at the Universities of Lyon (1928 – 1937) then Paris (1935 1955). In 1955, he took the Chair in Economics at Collège de France, the most prestigious French university institution. Eighteen foreign universities bestowed honorary doctorates on him in tribute to his work. He founded the Institute of Applied Economic Science, “ISEA”, in Paris in 1944, which later became ISMEA. Perroux was a learned visionary and a militant. In “the Economy of the 20th century” he wrote, “If we fail to take account of a single man, humanity has lost a winning opportunity” and put forward “a new development philosophy” aimed at combatting under-development in the Third World. He was a fierce critic of the economic and financial policies conducted toward the Third World, slating them as being too quantitative, too Western, and too focused on the industrialized nations’ own interests. His thoughts remain incredibly current, placing people at the core of economic activity development.*

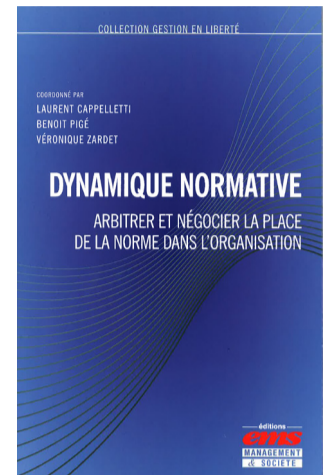
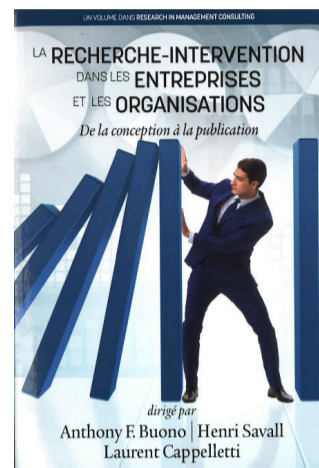


# [ Other publications & conferences dedicated to companies and organiza-



## ISEOR's publications in french :

- **La recherche-intervention dans les entreprises et les organisations**
  - Éditions IAP- Information Age Publishing - 2018
- **Le capitalisme socialement responsable existe -** Éditions EMS - 2015
- **Dynamique normative - Arbitrer et négocier la place de la norme dans l'organisation -** Éditions EMS - 2015
  - **Reconstruire l'entreprise, les fondements du management socio-économique** (Nouvelle édition remaniée) Éditions Dunod - 2014
- **Maîtriser les coûts et les performances cachés** Éditions Economica - 2008 et 2014



## Conferences for companies

### In Rhône-Alpes Business Club

In 2016 and 2017, two conferences were organized with leaders, executives and managers of SME.

### In the French Foundation for Management Education (FNEGE)

As early as 2016, FNEGE and ISEOR set up a seminary of training in the intervention-research for professors and researches.

### Within a network of Swiss' Entrepreneurs

In December 2016, Henri Savall and Véronique Zardet held a conference within the Association Rezo-nance (a professional social network) on the theme «management at the service of the human being».

### With the French Commercial Leaders

February 2017 – Conference on the issues of sales force in companies. The theme was “commercial innovations: all sellers in the organizations.”

