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## EDITORIAL

# What does “learning organization” mean?

Many people still ask “what *is* a learning organization, what does the concept mean?” This is entirely understandable. The learning organization – or for that matter organizational learning – is a concept (or phenomenon) that is not easily defined. Questions such as “are there any true learning organizations?” and “are there any organizations that are *not* learning?” arise. These questions are fair and so it is also fair that I, as Editor-in-Chief of *The Learning Organization*, the journal that publishes research on the learning organization and organizational learning, try to give an idea of how these questions may be answered, or at least offer my perspective on these issues. First, though, I will give a historical background to the term “learning organization”.

### The “learning organization” term in a historical perspective

The idea of the learning organization can be said to having been coined by Peter Senge in 1990, with his best-selling book *The Fifth Discipline: The Art and Practice of the Learning Organization* (Senge, 1990). Senge’s name has since then been almost synonymous with the idea of the learning organization and he is often considered to be the guru of the learning organization (e.g., Jackson, 2001), even if he by no means was the first author to use “learning organization” in the title of a publication (this was done by, e.g., Garratt, 1987; Hayes *et al.*, 1988).

As I have elaborated on more extensively elsewhere (Örtenblad, 2007), the term “learning organization” as used today could be assumed to be the result of two different developmental processes. In one of these, the word order “learning organization” was used for “organized learning”, that is, the organization of certain learning activities. This way of using the term appeared especially in the areas of pedagogy and educational science (e.g. Hofstetter, 1967), but also in the area of management and organization studies (e.g. Kolb *et al.*, 1971; Megginson and Pedler, 1976, p. 264; Huczynski and Boddy, 1979).

The other developmental process for the term “learning organization” was a transformation of the term “organizational learning”, in terms of a paraphrasing of the latter term to the former word order – a learning organization was simply an organization where learning is taking place. As early as the late 1970s and early 1980s, this paraphrasing occurred in works that are known to be about organizational learning (e.g. Argyris and Schön, 1978, p. 111; Hedberg, 1981, p. 22; Dery, 1982; Peters and Waterman, 1982, p. 110).

The exact connection between these two developmental processes and the coining of the learning organization concept as well as the current use of the term is, however, difficult to quantify – it is yet to be explored.

### On how to define concepts

There are many different approaches to defining a concept such as the learning organization. Three such approaches will be addressed here (for a fuller presentation of these approaches, see Örtenblad, 2010). Of these three approaches, two are more label-focused and one is more content-focused.

To start with the label-focused approaches, one fairly common approach is – in cases where the label consists of more than one word, as is the case with the labels of learning organization and organizational learning – to define the individual elements of the label and thereafter add up these two meanings. This approach, which could be called the *fragmentary approach*, would imply that “learning” and “organization” first are defined individually, and that these two definitions are subsequently put together. Another label-focused approach is the *wholeness approach*, which takes its inspiration from the theory of “combined concepts” (e.g. Wisniewski, 1997), implying that concepts change when they are combined. Thus, the concept of the learning organization may mean something different or even very different from the sum of the definitions of its two constituencies, whilst still being connected to the label. The third, more content-focused approach is the *interpretive approach*, where a concept is defined according to how it is used, that is, which meaning or meanings are given to a concept in various situations and by various people. In the below section, where the learning organization is defined, I first use a mix of the wholeness approach and the interpretive approach, and thereafter a more pure form of the interpretive approach to define the learning organization.

### Defining “learning organization”

To begin with the label of the learning organization, individual learning in a work-place or organizational context – without any connection to any organizational dimension – is not sufficient for something to be classified as *organizational learning* or a learning *organization*. Thus, a reasonable way to define the concepts of the learning organization and organizational learning is to claim that some kind of organizational aspect is related to the learning. The organizational aspect may take the form of 1) the organization being a facilitator, supporter and/or arranger of the learning going on in the organization, performed by individuals (“organization as facilitator”); 2) the organization being an additional, actual learning unit (“organization as learning unit”) or 3) the organization being the end process (in contrast to end *product*) that is dependent on learning and rests upon continuous learning to exist (“organization as end process”).

Therefore, it may be – as in the first of the three meanings – that the *unit* or *entity* of learning is the organization (or the group), rather than the individuals. Consequently, I do not agree with those who believe that the individual is the only unit that is capable of learning (for more in-depth discussions on the organization as a learning unit, see Örtenblad, 2005, 2009). The organization as such can learn, either as if it were an individual or as a collective (cf. Cook and Yanow, 1993).

I have elsewhere (e.g. Örtenblad, 2002, 2013a) claimed that within the literature that uses the term “learning organization” (and among the practitioners I have studied), there are four main versions of descriptions of what a learning organization is. These four versions, which I call *learning at work*, *climate for learning*, *organizational learning* and *learning structure*, appear either as isolated descriptions or are sometimes combined (see

Örtenblad, 2004). Below, these four versions of the learning organization are presented, and are categorized in relation to the three forms of organizational aspects.

#### *Organization as facilitator*

One version, *learning at work*, implies that the organization has re-directed its way to deal with development so that the employees learn at the workplace and in tight connection with work (that is, during the work tasks are performed) instead of taking formal courses, away from work. In this case, the organizational aspect of learning is present in the form of the organization arranging for learning to take place at work instead of through formal courses.

Another version of the learning organization, *climate for learning*, implies that the organization offers tools and opportunities for learning to the individuals and groups within it. The employees are encouraged to experiment, and “failure” is regarded as a learning opportunity. Time to reflect upon the experiments and the outcomes of these during work hours is generously offered. Thus, the organizational aspect here is that the organization is facilitating and, to some extent, arranging the learning.

#### *Organization as learning unit*

A third version, *organizational learning*, is what most scholars would probably define as “organizational learning”, at least when it comes to the distinction between individual and organizational learning that is made by authors such as Argyris and Schön (1978) and Kim (1993), namely that what the individuals learn, as agents for the organization, is stored outside single individuals in a form of organizational memory. The organizational memory is continuously updated and it functions as a basis for conducting work tasks as well as for further learning. In this case, the organizational aspect is that the organization learns as if it were an individual and the organization becomes a learning unit in itself.

There are, of course, quite a few who distinguish between the ideas of organizational learning and the learning organization (Tsang, 1997; Argyris, 1999), and also those who consider the learning organization to be a special case of organizational learning (e.g. Easterby-Smith, 1997). Nevertheless, I regard organizational learning (in addition to being a concept and an idea in its own right) as a special case – or a version of – the learning organization, in that people talking or writing about “learning organization” sometimes refer to what is often regarded as being a common definition of “organizational learning”.

#### *Organization as end process*

The fourth version, *learning structure*, is a bit more complex than the other three versions. It implies that the organization is structured in teams, in which every team member to a reasonable extent has learnt to perform the work tasks that normally are performed by the other team members, so that team performance is not dependent on any single team member. Thus, any team member can take care of and deal with any customer issue. If the true specialist is already occupied in helping a customer when the same performance is requested for solving another customer’s

needs, then any of the other team members can provide cover. This gives an enormous flexibility, especially since the teams have also learnt how to perform each other's team tasks. It takes a lot of continuous learning by everyone in such an organization to accomplish that kind of flexibility; not only does every team member have to learn how to perform the other team members' work tasks, and every team has to learn how to perform the other teams' work tasks – these skills have to be continually updated, and alongside everybody has to learn new skills in order to being able to give the customers what they want. Lots of communication is needed so that everybody in the organization knows where their help is needed. This version of the learning organization has a lot in common with organic structure, in that it is informal, decentralized, and non-hierarchical.

At least in some sense the knowledge learned has been learned by the organization as such, in that everyone knows everything (even if one still could argue that knowledge is stored within the individuals and not, e.g., in routines, documents, or manuals) – at the least, the risk of not being able to satisfy any particular customer or to lose any particular employee with their subjective knowledge is minimized through such a redundancy. However, the organizational aspect that is most salient in the learning structure version of the learning organization, is that the organization is dependent on and even rests upon learning by the employees, that is, organization as end process.

There is also a fifth version that, although it's rarely present within the notion of the learning organization (for exceptions, see Wenger, 1991, p. 8; Leitch *et al.*, 1996), is present in discussions of organizational learning. This is a newer perspective of organizational learning, in contrast to the traditional perspective (see above). There are three main differences between this newer, social perspective of organizational learning and the traditional perspective of organizational learning (see, e.g., Cook and Yanow, 1993; Gherardi *et al.*, 1998). First, in the newer, social perspective of organizational learning, the collective is the learning unit, rather than the individuals within an organization or the organization as if it were an individual, both of which are considered to be the learning units in the traditional perspective. Second, learning is a social or cultural activity in the newer perspective, while it is a mainly cognitive activity in the traditional perspective. Third, in the newer, social perspective, all learning is considered as context-dependent, while the traditional perspective acknowledges that there is context-independent learning. Consequently, in the newer perspective of organizational learning, "knowledge" cannot be stored and as a result this perspective prefers the term "knowing" instead of "knowledge".

### *On Sengeians and others*

Many of those who write about the learning organization tend to favor one author (or group of authors) over other authors, of those who have offered well-known definitions of the learning organization. Thus, we could talk about "Sengeians", "Garvinians", "Pedler, Burgoyne and Boydellians", "Watkins and Marsickians" etc. Each of these authors (or group of authors) could be related to the four versions of the learning organization. Senge's (e.g. Senge, 1990) version of the learning organization, according to my interpretation (see also Örtenblad, 2002), puts the learning structure version in focus, whilst including the climate for learning version. Garvin's (e.g. Garvin, 1993) definition definitely focuses on the organizational learning version, while Pedler, Burgoyne and

Boydell's (e.g. Pedler *et al.*, 1991) definition focuses on the climate for learning definition whilst including the learning structure version. Watkins and Marsick's (e.g. Watkins and Marsick, 1993) definition could be said to include all four versions of the learning organization.

### What “learning organization” is not

Not only is it important to find a definition of the concept of the learning organization, it is also important to being able to separate which organizations count as learning organizations from organizations that cannot be considered as learning organizations. The concept of the learning organization could be used symbolically, to give the organization a good reputation, whilst no measures have been taken to actually implement the learning organization in practice. For this reason, it is important to find ways to demarcate the learning organization concept, and define what any particular organization needs to have or to do to be considered a learning organization.

The following discussion on what a learning organization is and is not takes the set of four versions of the learning organization that were presented above as the starting point, and does not include the newer perspective of organizational learning, which generally comes under the notion of organizational learning, rather than the notion of the learning organization. It is a theoretical perspective rather than a version of the learning organization, and for this reason it is less relevant for deciding which organizations are learning organizations and which organizations are not learning organizations. Here, four different ways that “learning organization” could be demarcated are outlined and discussed: *the inclusive approach*, *the exclusive approach*, *the middle ground approach* and *the contextual approach*.

*The inclusive approach* implies that any organization that at least has any single element of any of the four above versions of the learning organization, is to be classified as a learning organization. Using this approach, practically each and every organization in the world could be classified as a learning organization, in that at least some storing of knowledge into an organizational memory, some kind of learning facilitation, or some learning from the customers, could be said to occurring in any particular organization. Thus, the inclusive approach to demarcation would make the concept of the learning organization more or less meaningless. This approach would hardly appear as fair to those organizations that really struggle to improve and make efforts to become learning organizations.

On the other hand, *the exclusive approach* implies that all elements of all of the four versions of the learning organization have to be present for any organization to count as a learning organization. This would imply that almost no organization whatsoever in the world would count as a learning organization, in that there is hardly any organization whatsoever for which all elements are fully relevant. This approach would be unreasonable in that it does not give any space for variations, and the demands here for being considered as a learning organization seem to be too high.

*The middle ground approach* implies that some kind of level is set, as to what needs to be present for an organization to be qualified to call itself a learning organization. This may sound easier than it actually is. Each of the four versions contains several elements.

For example, the “climate for learning” version could be divided into “general encouraging climate”, “encouragement of experimentation”, “failure as learning opportunity” and “time for reflection during work hours”. Thus, such a level that is requested here would – in addition to a decision on how many of the versions need to exist within the organization – need to specify how much of each of these elements as well as how many of them that would need to be adopted by any particular organization, for it to be categorized as having adopted any single element and any certain version of the learning organization.

One could, for instance, argue that all elements of one or two of the versions of the learning organization fully need to be present for an organization to be called a learning organization. Or one could argue that one element of each of the versions must be present, or that 50% of all individual elements that the four versions comprise of must be there for an organization to be classified as a learning organization (see also Örtenblad, 2016). To some extent this approach could be said to be fair, in that it puts more reasonable demands on organizations, and it also offers some flexibility for each organization to choose those elements that are relevant for them. However, there is still a risk that this flexibility is misused by those organizations that wish to appear as learning organizations with very minor efforts.

The fourth approach, *the contextual approach*, could better help to avoid such an over-symbolic use of the learning organization concept. This approach implies that a reasonable standard is set, with demands for organizations to live up to if they want to call themselves learning organization, a standard that varies from context to context. Thus, it may not be relevant for all organizations – irrespective of industry, sector, national culture, religion etc. – to learn in the exact same way. For example, it may be that health care organizations or aviation organizations could not experiment to the same extent as manufacturing or research organizations could do, and it may be that armies or safety organizations are prevented from storing knowledge in an organizational memory to the same extent that would be relevant for many other organizations. Thus, there would be reason to start in the overview definition – consisting of the four versions of the learning organization – and develop definitions for organizations in various contexts (see Örtenblad, 2013b, 2015; Örtenblad and Koris, 2014). There may also be reason to give these contextualized models or definitions of the learning organization different names, such as “learning university organization”, “learning hospital organization”, “Chinese learning organization”, “Canadian learning organization” etc. This approach is the one that I personally prefer, in that it both takes the context into account and puts high but reasonable demands for all organizations to live up to if they wish to call themselves learning organizations.

## Concluding remarks

There are many definitions of the learning organization, with varying degrees of similarity and differentiation. This article has offered an overview of definitions of the learning organization, in terms of four versions of the learning organization. More or less any existing definition of the learning organization could potentially be categorized within this set of four versions of the learning organization.

The article has proposed a suggestion regarding the demarcation of what is and what is not a learning organization. There is reason to adapt the demands that are put on organizations to be able to call themselves learning organizations, so that a contingency model

of demands on organizations in various industries, sectors, national cultures, religions etc., to be qualified as learning organizations, is developed. It is essential that every contribution to such a contingency model has a mutual starting point, such as the overall definition of the learning organization that has been presented within this article. Without such a common starting point, it would be difficult to make comparisons between academic works and between contexts, which would make it difficult (if not impossible) to develop a contingency model that is cumulative. It is only when such a contingency model has been developed, where the demands are related to certain conditions within the context of the organization, that reasonable demands could be put on organizations to qualify themselves as learning organizations. There is, therefore, a need for contributions to such a contingency model of the learning organization.

But contributions of other kinds to *The Learning Organization* and the debate on what “learning organization” (and/or “organizational learning”) means are also welcome. Contributions are welcome that discuss other ways of defining and demarcating the learning organization than those discussed in this article, especially as it is reasonable to assume that the meaning of concepts may change over time. These alternative ways of defining and/or demarcating the learning organization concept may build upon and develop the definition that is suggested in this article, or they may criticize the definition suggested here and suggest alternatives. A continued debate on what the learning organization and organizational learning is, and what it is not, is most welcome, and thus anyone should feel welcome to submit articles on these themes. Works on the “fifth version”, that is, the newer perspective of organizational learning, are of course as welcome as works on the other four versions of the learning organization.

In the near future, in upcoming issues, there will be some articles that connect to this debate on what “learning organization” means. There will be a series of interview articles with the originators of some of the most oft-cited definitions of the learning organization (and maybe also of organizational learning). These articles will bring up issues such as the impact of the authors’ own definition, the relationship between their own definition and others’ definitions, and the development of their definition over time. The first of these interview articles appears in this issue, namely an interview with Karen Watkins and Victoria Marsick.

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