

The Blue Ocean Strategy and Human Resources' Strategic Management: WESC as a Case Study

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Abstract

While scholarly writings highlighted the embeddedness of corruptive practices within public institutions across developing countries and the need of adopting the private sector's personnel management techniques, they did not specify how these managerial principals would be implemented. In this aim, this study borrows the concept of blue ocean strategy in emphasis on the innovative nature of human resources' strategic planning within public and non-profit organizations in developing countries. It examines how WESC, an Egyptian non-profit organization, adopted human resources' strategic planning as a blue ocean strategy toward the integration of new perspectives and opportunities in its management. The idea of blue ocean strategy is to discover new domains and/or renovate the existing ones so that public and non-profit organizations boost their productivity. This approach would be possibly implemented in the public sector to improve the quality of provided services and increase citizens' satisfaction. Based on WESC analysis, this paper sheds light on how the blue ocean strategy was incorporated and would, hence, be an insightful perspective for administrative development in developing countries. By conducting seven open-ended and semi-structured interviews with its working staff and manager, this study unravels the blue ocean strategy's rationale in light of WESC's innovative and better changes in its human resources' functions. By implementing human resources' strategic planning, WESC, instead of perceiving the human resources' department as a liability in its administrative structure, became convinced that the personnel management would be more efficiently and effectively carried out by more specialized employees in the human resources' functions than line managers.

Keywords: Human Resources' Strategic Planning, Blue Ocean Strategy, Public Sector Reform, Personnel Management, and Corruption.

Introduction

Based on the blue ocean strategy in strategic management, there are virgin domains that companies, entrepreneurs, and investors have left untapped and unexplored. Unlike the red ocean strategy, which refers to exhausted areas of investment and development, the blue ocean strategy presents an opportunity for developing countries to find new exploratory areas for growth and entrepreneurship (Kim & Mauborgne, 2004). In this vein, this study explores the possibility of adopting the blue ocean strategy as a means of supporting public sectors in developing countries, especially education. It does so by examining the case of Wadi Environmental Science Center (WESC)'s adoption of the blue ocean strategy in its internal structure toward improving its performance.

Established in 1998, WESC aimed to introduce innovative teaching techniques for Egyptian youth based on nature exploration, field trips, hands on activities, and inquiry-based learning (WESC Website, 2022). Being an outdoor environmental and educational non-profit organization, it sought adopting an innovative man-

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agerial technique in sustaining its activities and improving their effectiveness in the aim of attracting more qualified employees and more customers, especially students. Building on the literature addressing corruptive practices in the personnel management process in public institutions (Langbein & Sanabria, 2013; Gingerich, 2013; Cullen, 2012), this study highlights the salience of the blue ocean strategy in human resources' strategic management in terms of developing an integral system of recruitment and personnel management that reduces the incidence of corruption and increases productivity.

In this perspective, the study answers the following question: how would the blue ocean strategy help public and non-profit organizations in developing an efficient human resources' system away from corruptive practices? In answering this question, the study dwells on WESC as a case study of an Egyptian non-profit organization that inspired of the blue ocean strategy in developing an efficient and innovative system of personnel management away from corruptive practices. The study methodology relies on seven open-ended and semi-structured interviews conducted with WESC managers during the period from January to June 2021 and the text analysis of WESC website and managers' official statements about how they inspired of the blue ocean strategy in setting an effective management strategy for their non-profit organizations toward the establishment of a human resources' system.

The study will be divided into four sections. The first part examines the literature addressing malpractices in the human resources' management within the public sector, especially across developing countries while the second one introduces strategic management's blue ocean strategy in developing a comprehensive analysis of an effective human resource and personnel system that increases organizational efficiency and eliminates corruption. The third and fourth parts explore the case of WESC's inspiration of strategic management's blue ocean strategy in developing an efficient human resources and recruitment system.

Personnel Management in the Public Sector

Copious scholarly writings have referred to the mere absence of the principles of good governance across developing countries (Perry, 2015; Perry et al., 2014; Anders, 2010). By associating good governance to institutional efficiency, scholars examined the lack of good governance principles in the human resources' management within public organizations. Personnel management scholarship highlighted an existing division across public sectors in the world. While developed countries have surmounted organizational challenges related to corruptive practices in the personnel management process, developing countries remained idle in incorporating the strategic management principles and enhancing the public sector performance, especially in terms of adopting an efficient recruitment strategy (Devarro, 2005; Meyer-Sahling & Mikkelsen, 2016; Oliveros & Schuster, 2018).

Abundant scholarship in organizational personnel management underlined corruption as an inherent practice in state institutions across developing countries (Chêne, 2009; Thomas, 2012; Vian et al., 2011). Although merit-based and tenure employment have been conceived as the main pillar of an independent public sector from state politics, the inefficient management of human resources opened the way for the widespread of corruptive administrative practices. Examining cases of third world countries since their independence until recent years, scholars referred to the abuse of power, favoritism, nepotism, and clientelism as the main malpractices embedded into public institutions (Feldstat, 2009; Poocharoen and Brillantes 2013; Nicholls-Nixon et al., 2011; Euractiv, 2014; Idedia, 2012; Ncube, 2014). They mentioned cases of buying and selling administrative positions in Africa, especially within localities, and patronage in Philippines and Indonesia where politicians' recommendations are often used as criteria of candidates' selection (Springer, 2012; Rice and Filipelli, 2010). Scholarly writings indicated that administrative recruitment, especially among the top ranking positions, has been restricted to and dominated by the ruling elite who developed a behavioral pattern that deviates from good governance in order to maintain its political position and socioeconomic privileges (Oliveros, 2016; Rosenblatt, 2012; Charron et al., 2016; Cullen, 2012).

Scholars underlined that developing countries suffered from the lack of accountability and the mis-use of public funds (Alt & Lassen, 2008; Belle & Cantonelli, 2017; Bobonis et al., 2016). Public institutions have been dominated by rulers' appointees among family members or political allies, which prevented the development of a representative recruitment system within institutions and blocked the entrance of qualified candidates. This blockage was due to the absence of a healthy organizational structure in the public sector that has always been subordinated to political and security exigencies. The access to top and middle ranking positions was conditioned by candidates' recognition as loyal political partners (McCourt, 1999; Siddiqui et al., 2004). Also, ascension to higher administrative positions, promotion, and compensations lacked transparency and candidates were barely able to appeal decisions in light of the lack of accountability, the inefficiency of state institutions, and the absence of whistle-blowing mechanisms. In other cases, the rotation system would be introduced as either a reward or punishment for employees by transferring staffs from their positions in order to prevent or allow them to develop connections with customers and benefit from their lucrative positions. Poor human resource management has entrenched corruptive practices within state institutions, which led to the metamorphosis of an under-qualified and unsatisfying civil service (Brezis & Cariolle, 2014; Zinnbauer, 2014; Thomas, 2014; Whitton, 2001; Lapira & Thomas, 2014).

In response to a generalized decay in public institutions, scholars draw examples from developed and developing countries who have embarked on a comprehensive process of administrative reforms (Lawanson & Adeyoye, 2013; Menzel, 2015; Neshkova & Kostandinova, 2012). With the downsizing of the state bureaucracy, governments borrowed private sector's managerial techniques in order to ensure public servants' independence and autonomy from politics in addition to the development of an efficient system of accountability (Hamming, 2008; Sah, 2017; Sah & Loewenstein, 2015). Further techniques have been implemented to ensure meritocracy such as entry exams and the specification of recruitment criteria related to educational and professional qualifications in addition to value dimensions related to the verification of candidates' internalization of a code of ethics. Scholars underscored the necessary adoption of a standardized recruitment system, which has been established and practiced for long years in developing countries (Johnston, 2005; Ferraz & Finan, 2011; Dahlström et al., 2012). A transparent process based on the public advertisement of the job position, including the clarification of criteria of selection, the adoption of a standardized scoring system, shortlisting, and final procedure selection. Yet, developing countries experienced difficulties in implementing these criteria toward limiting corruptive practices in the personnel management, especially the recruitment and monitoring processes (Council of Europe, 2000; Ariely & Uslamer, 2017; Vian et al., 2011).

The stagnation of public institutions in developing countries has prevented the smooth transition toward a more transparent and less corruptive personnel management process, which degraded the quality of public service and prevented the development of a healthy state-citizens relationship (Global Corruption Barometer, 2017-2019). Patronage, nepotism, and misuse of power have prevented state institutions from fulfilling their mandates and ensuring the optimal use of state resources and funds toward addressing the country's chronic issues, especially education, health, and infrastructure (Zoweil, 2011; UNESCO, 2010). In this perspective, the next part of this paper will elaborate on how human resources' planning would introduce a blueprint for reform within public and non-profit organizations across developing countries. Inspiring from the blue ocean strategy as a long-term rescue option, human resources' planning is suggested an organizational process that would enable the public sector to efficiently cope with the new world order exigencies and improve its performance toward bringing more advantages and opportunities for citizens.

Human Resources Management: A Blue Ocean for Public and Non-Profit Organizations

In his book, *Strategic Planning for Public and Non-Profit Organizations*, Bryson (2010) defined strategic planning as the process of reconsidering decision-making dynamics by defining the organization's position, mission, and goals in order to develop effective managerial tasks and improve its performance. It aims to sustain administrative units' efficiency and productivity within a changing and challenging environment

in light of obstacles and opportunities that have to be carefully seized, analyzed, and treated in order to survive and excel. In spite of variations in conditions and priorities, reconsidering strategies and decision-making tools is necessary for organizations' survival. Human Resources' planning examines public or nonprofit organizations' strategic objectives side by side to human resources' activities in order to enhance overall performance and increase the quality of service provision (Nkomo, 1987; Ebadan & Winstanley, 2009). Human resources' planning enables public organizations to identify the personnel performance and effectiveness in terms of cost and skills. It flexibly fits into organizations' corporate and business strategies as an ineluctable procedure to identify a clear vision and the necessary tools for its achievement. In this respect, it focuses on two important goals, determining what kind of employees are needed to run the organization and identifying policies and programs for improving their skills and performance. Concerned with the personnel's well-being for boosting organizational performance and achieving strategic objectives, human resources' planning determines recruitment's costs and the means of effectively performing missions and carrying out operational and structural changes. In recognition of its importance, public organizations integrate human resources' planning into their organizational structural in response to demands for a better quality service (Sword & Cutsinger, 1984; Hernandez & Franklin, 2004).

According to Nalbandian and Klingner (2003), human resources' strategic planning consists of four complementary and simultaneous processes to guarantee a better personnel performance and a successful organization in its mission and vision, which are planning, budgeting, and monitoring employees' productivity, job analysis, classification, and rewarding system in terms of pay and benefits. Human resources' strategic planning integrates human resources' activities, policies, and programs into the organization's mission and needs in order to enable the organization to efficiently achieve its goals and create a public value. By scanning an organization's environment and identifying its strength, weakness, threats, and opportunities, strategic planning guarantees employees' loyalty and high performance in implementing policies to deal with challenges, reduce weaknesses, benefit from strengths, and grasp opportunities (Berman, 2015; Brush & Ruse, 2005). Human resources' planning enables organizations to reconsider their policies and activities in order to develop employees' competencies and skills in line with organizations' strategies and projected goals. The human resources' system has to be constantly revised in order to develop and integrate new values and enhance overall organizational capacity without undermining individual rights and employees' social equity. New values would be integrated, such as flexible work relations, contracting-out, pay for performance, and regular evaluation where focus is shifted on people as the main and important concern of human resource management (Schuler, 1990).

Human resources' strategic planning, as a continuous process of adapting employees' competencies and skills to existing jobs and positions within the organization, relies on budgeting and monitoring employees' productivity as a second component in human resources' planning (Mondy, 2009; Wayne, 2009; Devaro, 2005). Human resources' planning cares about relating employees to the organization's mission and goals in light of its budget. The available budgetary resources determine the type/number of positions, the required skills, and competencies. Human resources' departments carry out a planning forecast in terms of identifying the number of needed employees, skills, competencies, and qualifications in line with organizational needs. Budgets determine the necessary and available funds that would enable the organization to carry out its projected human resources' planning in order to acquire the needed skills by mentioning details about the different activities and positions within the organization and the required financial resources to satisfy the organization's projected performance. Budgets' formulation identifies how organizations would secure employees' needs in light of available resources through the development of a clear and determined job description and specification according to which they design the selection mechanisms for different positions.

The process of budgeting and monitoring employees' productivity depends on the effectiveness of human resources' strategic planning in terms of reconsidering and reformulating human resources' policies,

programs, and activities toward a sustainable and high performance. An effective human resources' planning defines the organization's priorities according to which financial resources would be allocated (Bechet & Maki, 2002). Stakeholders influence the budgetary design through the clarification of needed skills, competencies, positions, and priorities to which resources will be oriented. Human resources' planning raises the issue of productivity through the verification of an achieved balance between limited financial resources and the required level of performance to achieve the organization's mission based on various dynamics, such as the pay for performance, flexible work schedule, and employees' assistance programs.

The third element of human resources' planning was job analysis which consisted of determining positions' duties within the organization and the required competencies and skills (Jackson & Schuler, 1990). In order to create an effective job analysis, information and data about human requirements, performance standards, physical capital requirements, and job context needed to be collected by human resources' managers in order to give an accurate description of positions' duties, specifications, and required skills due to limited resources. Jobs and positions were mostly classified in terms of type and the level of difficulty they involved in terms of responsibilities, duties, and authority. A job description provided information about the job's working conditions, specifications, which were obtained by supervising, interviewing, and observing employees.

The last component of human resources' planning was rewarding work in terms of pay and benefits. The compensation system had to be fair for employees, determined in light of the job market, and easy to monitor for employers in public or nonprofit organizations (Ulfrets et al., 2009; Brush & Ruse, 2005). Advocacies for a better compensation system within organizations called for a pay based on employees' performance and a flexible compensation scheme that included other types of benefits, such as protection programs, the provision of additional services, and sick and annual leaves, and disability holidays. Pay was determined based on factors of internal and external equity, which consisted of job evaluation in function of its worth within the organization and/or the local job market. Although the introduction of the pay for performance in the public sector constituted an important development in the compensation system since the 1980s, impediments slowed its adoption, such as the organizational culture, unions and syndicates' fights for workers' individual rights.

WESC Human Resources' Strategic Planning: A Paradigm Shift

Based on seven extensive open-ended and semi-structured interviews conducted by the author with the founder and employees, WESC's approach toward human resources' functions was inconsistent with scholarly writings addressing human resources in public and non-profit organizations. While scholarship acknowledged the importance of a human resources' management as a prerequisite for improving public organizations' performance and recruitment process, WESC assigned the human resources' functions to line managers (Interviews 1 and 3). Both Nalbandian and Klinger (2003) called for the development of human resources' management, as a set of autonomous tasks, in terms of rethinking their functions in line with the organization's jobs and missions so that it would be an asset and not a liability. Accordingly, human resources' management is part of an organization and has to be reconsidered within strategic plans that the organization carries out to achieve its goals. This vision focuses on human resources' management as an asset in the company that has to be developed and enhanced through a set of policies and measures that would address its weaknesses in order to achieve the company's mission and increase employees' performance and commitment. Human resources' management reinforces employees' relations with line managers and broadens their functions as an important step towards the implementation of a strategic management that copes with changes. Being an important organizational function, flexibility and innovation are required in the reconsideration of organizational strategies vis-à-vis human resources functions and management.

Based on seven extensive open-ended and semi-structured interviews conducted with its staff, WESC as an Egyptian nonprofit organization that started to operate in 1998 in environmental awareness, lacked a focused strategy for an effective human resources' planning due to various obstacles. WESC's human

resources' functions were not developed throughout a defined structure that was handled by a separate department (WESC website). The different personnel functions were occasionally developed based on organizational needs instead of directly and regularly addressing personnel affairs as a basic element and determinant of organizational performance.

"WESC has delegated human resources' functions as auxiliary tasks to employees in light of its flexible and horizontal administrative structure that facilitated the effective coordination and decision-making process based on the principle of active citizenship" (Interviews 3 and 4).

WESC adopted a strategic management process without applying it to its human resources' functions, policies, and programs since it did not perceive it as an autonomous department in the organizational structure. This simplistic and reductionist design of human resources' planning excluded the latter from the organization's strategic management process since human resources' planning has been reduced to a reactive process to emerging and urgent needs. Yet, human resources' planning is the regular process of defining employees' needs and competencies toward the realization of the organization's objectives, policies, and procedures. In light of WESC's limited budget and small number of employees, it was not affected by the delegation of human resources' planning to a secondary position or the lack of an autonomous and proactive human resources' planning within its structure (Interviews 5 and 6). Being a project-based non-profit organization entailing 18 employees working within a horizontal structure, human resources' planning was subordinated to the organization's mission and needs without being an integrated part of the permanent organizational effort in terms of interaction and engagement in the definition and implementation of its strategic management. WESC's fulfillment of selective human resources' functions in response to organizational needs underlined the absence of an efficient human resources' system that would regulate human resources' tasks.

WESC's main challenge consisted of the absence of an accurate and regular assessment of human resources' needs that would be either developed, acquired, or outsourced for the implementation of organizational functions due to different reasons. First, the lack of financial resources impeded the improvement of human resources' functions, competencies, and the creation of an autonomous human resources department (Interview 1). WESC raised its financial resources through partnerships with foreign non-profit organizations that were an additional source of income via funds and grants. The identification of human resources' needs was neither a consistent nor a systematic process that would keep the organization on its projected level of performance in line with stakeholders' expectations. Stakeholders, mainly consisted of schools, donors, the Ministry of Environment, and El-Wadi Holdings, did not play an effective role in enhancing the organization's performance in terms of helping the latter to address human resources' needs and requirements. The random human resources' assessment in terms of determining the personnel needs and implementing strategies to equip employees with the required skills led to a performance gap among employees who have not all received trainings. Second, the lack of legal jurisdictions in human resources' planning in terms of identifying needs, allocating resources, and organizing activities has negatively affected the organization (Interview 6). According to a WESC employee:

"Multi-tasking core jobs, such as the office manager, the director, the accountant, the project coordinator, and field trips' educators did not only perform their main tasks but they were also assigned additional human resources' functions related to employees' appraisal, compensation, evaluation, security, and social payments. This functional overload highlighted the necessity of creating a separate human resources' department in the organization."

As it could not develop its own human resources' department as an integral part of the organization due to limited financial resources or the lack of expertise, WESC outsourced human resources' planning in order to constantly assess human resources' needs and skills and identify the required policies to increase employees' productivity and commitment. In this perspective, the manager declared:

"WESC conducted a strategic analysis for its human resources' needs and approached human resources' functions as a responsibility whose management would be outsourced." (Interview 2)

WESC worked on improving employees' productivity throughout a regular evaluation process that was systematically carried out every three months by the core team's director alongside consultants who set evaluation criteria and undertook a personnel and jobs' assessment (Interview 4). In addition to the focus on the required qualifications assigned for each position, criteria measured employees' flexibility, potential leadership, and ability to work with a team. This assessment constituted a reliable indicator in attributing raises in employees' salaries and promotions. Assessment results were discussed with different employees in order to determine their needs for increasing organizational performance. WESC's horizontal structure and limited number of employees represented an advantage for the organization in monitoring employees' performance, ensuring the principle of active citizenship, and enabling employees to voice their concerns and be individually assessed (Interview 7). After conducting an overall evaluation, managers, inspired by the blue ocean strategy, followed consultants' recommendation of introducing flexible work procedures that would allow remote working in order to improve employees' performance and wisely use the organization's limited resources.

Human resources' consultants conducted a strategic planning for WESC personnel's needs. According to the manager:

"Benefiting from our small number, alongside consultants, we first carried out a job analysis for the different positions: the director, the office manager, IT person, accountant, project coordinators, project managers, project leaders and elementary and senior coordinators. Then, consultants identified responsibilities and specifications, which were determined according to each position's needs in carrying out the different assigned tasks." (Interview 6)

WESC hired human resources' consultants as professional experts in order to design a human resources' plan for WESC, which would be implemented by line managers. By operating a strategic management for human resources, the process took into consideration the skills that the organization needs for its employees and the necessary employment procedures through effective policies and activities. In this aim, WESC created partnerships with non-profit organizations specialized in environmental awareness in order to increase its funding and expertise. In this regard, one of the employees asserted:

"This idea of partnership was effective in inspiring WESC's staffs about the most efficient human resources' policies that would increase productivity throughout different organizational positions." (Interview 4)

In collaboration with partners, WESC conducted a detailed analysis of stakeholders' perspectives, planned a participation grid, identified the organization's needs and criteria of assessment. This step helped the organization to find funding sources among stakeholders based on a meticulous assessment of its internal and external environment in a way that enabled it to benefit from different opportunities and minimize potential threats. Once donors have been specified, WESC designed a competence-based job analysis that is more result-oriented in line with the non-profit organization's vision (Interview 2). Accordingly, it determined the required skills and competencies for each job and position in the organization's charter to increase employees' performance. The job analysis enabled a more efficient personnel management in terms of core missions and deficiencies and the design of a new recruitment policy that considered social equity and upgrading employees' skills. According to the manager:

"By including the collective bargaining and affirmative action systems for personnel management, the organization considered planning jobs in function of task partition and the equitable representation of minority classes. It recommended the provision of training sessions in order to guarantee a better performance, equal rights, and equity among employees in their career advancement. Training programs would be addressing employees in function of work experience, qualifications, and seniority." (Interview 6)

WESC adopted a flexible pay system based on a regular job and performance evaluation (Interview 4). It implemented the pay for performance system by taking advantage of the limited number of employees in the organization. This measure developed an incentive-based compensation system to increase employees' productivity and enable a small number of employees to carry out the human resources' functions in light of WESC limited budget. WESC's charter indicated that the entry salary had to be two thousand Egyptian pounds that would be subject to further increases two years after the recruitment date (WESC website). Incentives and motivations were attributed to employees who participated in expeditions and trips, absence and leave policies were flexible in terms of employees' personal conditions and the organization's overall performance and working condition at the time of leaves' submission. Also, recreational activities, such as retreats, the celebration of personal occasion, and the provision of social and health insurance to employees were specified.

Conclusion and Recommendations

Human resources' strategic management provides an innovative venue for improving organizational performance in public and non-profit organizations across developing countries. Based on a regular and participatory process of examining and analyzing employees' needs, human resources' strategic planning enables state institutions to adapt human resources' functions and tasks in function of their vision, mission, goals, and resources. In this study, the case of WESC shed light on how human resources' strategic management constituted a blue ocean strategy that enabled managers to incorporate human resources' functions and tasks through flexible and innovative means that suited organizations' needs and resources. Being limited in number of employees and budget, WESC conducted a human resources' strategic planning that introduced effective policies and means of personnel management and recruitment by hiring consultants who would design and identify the necessary functions, policies, and procedures to be carried out by line managers.

Taking into account human resources' strategic planning as a blueprint for administrative reform in state institutions, human resources have to be carefully addressed as an integral and regular part of the organization. Human resources' functions, needs, and policies act as the tool for achieving organizations' mission and vision through the improvement of employees' performance and the recruitment of competent candidates while curbing corruptive practices. Since the basic idea behind administrative reform is to improve the delivery service of public institutions and limit corruptive practices that inhibit organizational productivity, human resources' strategic management is a salient process for organizations in transition. Focusing on the human factor, its needs, its functions, its tasks, and performance within organizations, an effective human resources' management will certainly enable the development of an encouraging and balanced working environment. In light of its flexible and innovative approach toward human resources, strategic management will adapt to organizations' resources and needs in recruiting, monitoring, assessing, and training employees to ensure their ability to produce and speak up against irregularities and violations.

For public institutions in developing countries to benefit from human resources' strategic planning, leaders have to regularly conduct an internal and external environmental assessment for their organizations twice a year. By identifying areas of weaknesses, advantages, threats, and opportunities, public organizations will have an appropriate picture about their human resources' needs in terms of functions, tasks, skills, and competencies. Also, the environmental assessment will help organizations to track their expenditure and have an accurate idea about their resources, which will contribute to the determination of the appropriate design of the human resources' setting. Public organizations can adapt the design, structure, policy, and functions of their human resources' department in line with their mission, vision, and resources. This flexible setting of human resources enables public institutions to ensure accountability through a regular process of personnel evaluation, assessment, and training. Overall, human resources' strategic management will improve the quality of civil service and develop employees' performance by ensuring that recruitment, training, compensation, and the pay reflect the organization's mission, vision, objectives, and required skills and competencies. By according importance to human resources' strategic planning, corruption will have no reason to exist within organizations where employees are carefully screened before recruitment, closely and regularly evaluated, assessed, trained, and adequately paid for performance.

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