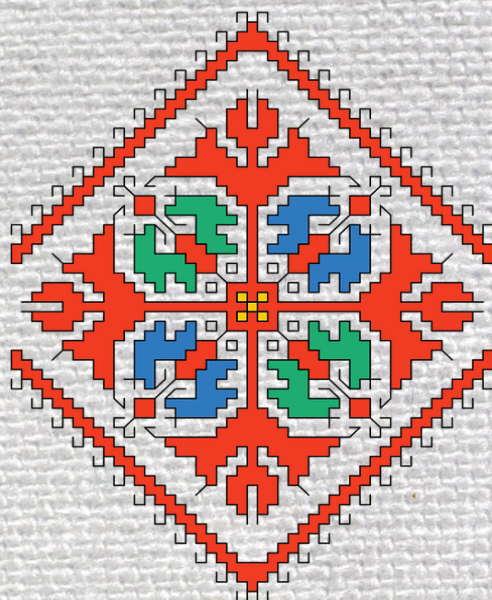


Образование, научни изследвания и иновации



Education,
scientific research
and innovation

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Съдържание**Contents****Обществени комуникации
и информационни науки****Public Communications and
Information Sciences**

Етични предизвикателства и управление на иновациите: изкуственият интелект като двигател на Индустрия 4.0 <i>Тобиас Дикс</i>	7	Ethical Challenges and Innovation Management: Artificial Intelligence as a Driver of Industry 4.0 <i>Tobias Dix</i>
Най-добри практики и източници на грешки: какво разкрива документацията на проекти за успеха на инфраструктурните проекти <i>Зринка Лорх</i>	12	Best Practices and Sources of Error: What Project Documentations Reveal About the Success of Infrastructure Projects <i>Zrinka Lorch</i>
Ролята на лидера за мотивиране на персонала <i>Стефан Методиев</i>	17	The Role of the Leader in Motivating Staff <i>Stefan Metodiev</i>
Ролята на медийното образование за изпълнителни директори и представители по време на криза <i>Лена П. Ланц</i>	25	The Role of Media Training in Crisis for Executives and Representatives <i>Lena P. Lanz</i>
Промени в управленската комуникация <i>Детлеф Шолц</i>	34	Changes in Leadership Communication <i>Detlef Scholz</i>
Валидност на самооценките като инструмент за изследване: когнитивна и психологическа перспектива <i>Даниел Шилинг</i>	40	Validity of Self-Assessments as an Audit Tool: a Cognitive and Psychological Perspective <i>Daniel Schilling</i>
Гъвкавост: спасител или изтъркана употреба? <i>Кристиан Байкирх</i>	46	Agility: Savior or Inflationary Use? <i>Christian Beikirch</i>
Грешки при измерването във въпросниците: анализ на грешките, специфични за формата на въпроса <i>Даниел Шилинг</i>	51	Measurement Errors in Questionnaires: an Analysis of Question Format-Specific Errors <i>Daniel Schilling</i>

Оценяване на лидерския потенциал: влияние на невербалното поведение и реакциите на стрес при интервюта на хора с отговорни постове <i>Лукас ван Ленгерих</i>	57	Evaluating Leadership Potential: the Impact of Nonverbal Behaviors and Stress Responses in High-Stakes Interviews <i>Lukas van Lengerich</i>
Методи и подходи за измерване на удовлетвореността от работата <i>Ясмин Кармен Бауман</i>	67	Methods and Approaches for Measuring Job Satisfaction <i>Jasmin Carmen Baumann</i>
Поколение Алфа и бъдещата работна сила: теоретична перспектива към очакванията за лидерство <i>Джина Вреде</i>	73	Generation Alpha and the Future Workforce: a Theoretical Perspective of Leadership Expectations <i>Gina Wrede</i>
Кодексът за поведение като вид регулиране на съответствието, илюстриран от насоките на Deutsche Vermögensberatung AG <i>Диана Леа Рисман</i>	85	Code of Conduct as a Type of Compliance Regulation Illustrated by the Guidelines of Deutsche Vermögensberatung AG <i>Diana Lea Rißmann</i>
Предизвикателствата на лидерството в Ерата на лидерството 4.0 <i>Ясмин Кармен Бауман</i>	90	The Challenges of Leadership in the Age of Leadership 4.0 <i>Jasmin Baumann</i>
Поглед към поколенията: поколението Z и неговите очаквания за лидерството <i>Натали Кристин Вайс</i>	95	A Look at Generations: Gen Z and Its Expectations of Leadership <i>Nathalie Christin Weiß</i>
Развитие на съвременни управленски стилове чрез дигитализация <i>Диана Леа Рисман</i>	102	The Development of Modern Leadership Styles Through Digitalisation <i>Diana Lea Rißmann</i>
Актуално		Current
Управленският парадокс и ефектът върху училището <i>Ишай Никритин</i>	106	The Management Paradox and Its Effect on School <i>Yishay Nikritin</i>
Как привързаността контролира нивата на стрес: поглед върху изследвания на мозъка <i>Яна Йонсон</i>	114	How Attachment Controls Our Stress Levels: Insight into Brain Research <i>Jana Johnson</i>

Въведение в психология на участниците
в трафика и отделно избрани теми от
психологията на участниците в трафика
Катя Лоре Шуг

119

Introduction to Traffic Psychology and
Individually Selected
Traffic Psychology Topics
Katja Lore Schug

Ролята на неправителствените организации
(НПО) в България за съвременното
обществено-икономическо развитие
Стефан Методиев

124

The Role of Non-Governmental Organizations
(NGOS) in Bulgaria in Modern
Socio-Economic Development
Stefan Metodiev

ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

ETHICAL CHALLENGES AND INNOVATION MANAGEMENT: ARTIFICIAL INTELLIGENCE AS A DRIVER OF INDUSTRY 4.0

Tobias Dix

University of Library Studies and Information Technologies

Abstract: *The rapid advancement of artificial intelligence has positioned it as a key driver of the fourth industrial revolution. AI enables businesses to digitalise processes, optimise workflows, and foster innovation by leveraging two primary forms: Generative AI, which produces creative outputs such as text and images, and Automated AI, which improves operational efficiency through process automation. These technologies address challenges such as demographic shifts and the shortage of skilled labour, contributing to economic growth and productivity. However, the adoption of AI raises significant ethical and social concerns. Fairness, transparency, accountability, and human autonomy must be considered to ensure trust and acceptance among employees and society. Ethical frameworks, like the EU Ethics Guidelines, emphasise harm prevention, non-discrimination, and data protection. Ethical leadership and effective innovation management are crucial for AI's successful integration. Leaders must promote a vision for innovation, empower employees, and create an open communication culture, fault tolerance, and continuous learning. Addressing fears of job displacement and supporting up-skilling initiatives are essential to maintaining organisational commitment. AI is a fundamental pillar of Industry 4.0, enabling economic growth and innovation while addressing societal challenges. A value-oriented and transparent implementation ensures its potential benefits businesses, employees, and society.*

Keywords: *AI, Artificial Intelligence, Industry 4.0, Ethics*

INTRODUCTION

Rapid technological advances, particularly in artificial intelligence (AI), create new business challenges. It is not only the sometimes weak economy in some industries that poses a challenge for companies, but also demographic change and the shortage of skilled workers (Jacob 2020). In this context, AI drives the fourth industrial revolution (Industry 4.0) (Barthelmeß and Furbach 2021). However, introducing AI also brings ethical and legal issues that must be considered (Heinen, Heuer and Schautschick 2017; Barthelmeß and Furbach 2021; Giering 2021). Ethical behaviour and leadership are the basic requirements for driving innovation forward. Without ethical leadership behaviour, innovation is not possible (Blok and Lemmens 2013). This plays an increasingly important role, especially at a time when China is shaping the global market in many areas following its innovation initiative (Cao and Wang 2016). According to Tidd & Bessant (2021), there has been no economic growth without innovation since the 1800s (Tidd and Bessant 2021). In innovation management, an ethical and innovation-friendly management methodology is essential, and the following points stand out here (Tidd and Bessant 2021):

- **Visionary leadership:** Managers must communicate a clear vision for innovation and explain the purpose and importance of innovation to employees. This creates motivation and commitment.
- **Empowerment and autonomy:** Employees must act independently and contribute new ideas. A culture of autonomy and trust promotes creativity.
- **Open communication and feedback:** An open communication culture in which feedback is welcomed and constructively implemented is essential for innovation. Even if unconventional, employees must feel safe sharing their ideas.
- **Fault tolerance:** Innovation is associated with risks and mistakes. Managers must create a culture where mistakes are seen as learning opportunities, not failures.
- **Cooperation and teamwork:** Innovation often requires collaboration between departments and teams. Managers must promote cooperation and avoid silo thinking.

- Provision of resources: Innovation requires resources, both financial and human. Managers must ensure that the necessary resources are available.
- Continuous learning and development: Innovation requires constant learning and developing new skills. Managers must promote the further training of employees and create a learning organisation.

RESEARCH METHODOLOGY

Ethical working and behaviour are, therefore, fundamental to economic growth. The introduction or use of AI can undoubtedly occur without significant problems through good change management, but there are always ethical concerns here. The EU expert group has published a guide on this topic that explains the ethical considerations of AI (Europäische Kommission 2019). The ethical concerns surrounding AI are diverse and complex. The ethics guide (Europäische Kommission 2019) addresses the following points, among others:

- Human autonomy: AI systems should not restrict or undermine human self-determination. AI systems should not make decisions that significantly impact people's lives exclusively.
- Harm prevention: AI systems should be designed and deployed so that they do not cause any harm, physically or psychologically. Safety mechanisms and control instances are essential.
- Fairness and non-discrimination: AI systems should be fair and impartial and not promote discrimination based on gender, origin, religion or other characteristics. Bias in data and algorithms must be avoided.
- Transparency and explainability: The functioning of AI systems should be transparent and comprehensible. Users should understand how decisions are made to create trust and ensure accountability.
- Data protection: AI systems must not infringe on people's privacy. The handling of personal data must comply with the applicable data protection regulations.
- Responsibility: Responsibility for the decisions and actions of AI systems must be clearly defined. Accountability mechanisms are required to ensure transparency and accountability. It is not always possible to eliminate ethical concerns, as ethical issues in the context of AI require constant discussion and adaptation. Instead, the aim is to take these concerns seriously and minimise them through appropriate measures. The guide (European Commission 2019) offers some approaches to this:
 - Compliance with ethical principles: The development and use of AI systems must be based on the ethical principles set out in the guidelines (European Commission 2019) (Europäische Kommission 2019).
 - Implementing control mechanisms: Technical and organisational measures, such as audits and human supervision, can help minimise AI system risks.
 - Transparent design of AI systems: The functioning of AI systems should be as transparent as possible to create trust and ensure the traceability of decisions.
 - Continuous review and adaptation: The ethical implications of AI systems must be continuously reviewed, and the corresponding measures must be adapted to meet the changing technological and social challenges.
- Broad social dialogue: An open dialogue between experts, political decision-makers, and the public is essential to ensure a responsible approach to AI.

These aspects must always be considered when introducing AI systems to ensure the technology's acceptance and trustworthiness among employees. Only in this way can AI's benefits and innovative potential for companies and society be fully utilised (Käde and Maltzan 2020; Barton and Pöppelbuß 2022; Rebstadt et al. 2022). AI and its use in companies can become or contribute to innovation if used correctly and ethically.

The types of AI currently used in companies are:

- **Generative AI:** This type of AI creates new content, such as text, images, music or other creative outputs, based on existing data. Well-known examples are GPT models (like me) and DALL-E for image generation (Ellis and Slade 2023).
- **Automating AI:** This AI is used to automate processes, such as manufacturing. It optimises or replaces human activities in predefined task fields (Smuha 2019).

Both types of AI can be used in different industries and functions to support innovation processes and

achieve efficiency gains. Generative AI can be used in marketing for image or text generation, product development to create new designs, and research to generate creative solutions (Pfeiffer 2020). Digitalising processes that could not previously be digitalised is also an excellent opportunity for companies. This includes the allocation and processing of documents such as order confirmations. Digitalising processes has been the best way to streamline processes for decades (Dörn 2017; Töpfer 2023). Automating AI is used to control machines or monitor and intervene in processes, among other things. Quality management activities are often performed here, e.g., tracking the welding or soldering of robots or humans manually connecting plugs. Both application forms enable companies to develop innovative products and services and efficiently organise internal processes. Chalmers et al. (2021) referred to AI as the virtual revolution and Industry 4.0 (Chalmers, MacKenzie and Carter 2020). Industry 4.0 will be characterised by networking and digitalisation. A core aspect or a central pillar here is AI, which will further digitalise processes now and in the near future and simplify workflows to such an extent that innovations will be made possible or significantly accelerated (Pfeiffer 2020; Barthelmeß and Furbach, 2021; Müssig 2021). AI is a powerful technology that can significantly promote company innovation and efficiency. It is, therefore, essential to consider the ethical aspects of the introduction and application of AI to guarantee acceptance and trust in the technology. A value-oriented and transparent implementation of AI is crucial to ensure that the potential for companies and society can be fully utilised (Pfeiffer 2020; Barthelmeß and Furbach 2021; Müssig 2021). AI can act as an essential driver for Industry 4.0 by enabling the digitalisation of processes and the development of innovative products and services. Automating AI in production can counter demographic change (Barthelmeß and Furbach 2021).

The ethical aspects must also be considered to avoid losing employees' acceptance from the outset. Implementing new technologies always promotes the fear of losing one's job or requiring completely new tasks (Pfeiffer 2020; Barthelmeß and Furbach 2021; Müssig 2021). This can lead to de-skilling or up-skilling. De-skilling refers to the "downgrading" of an employee to a lower job and, of course, the loss of prestige and lower pay. Moreover, up-skilling refers to the exact opposite. If AI is used in production to counteract demographic change or achieve efficiency gains, offering employees new perspectives and training opportunities is essential. This is the only way to manage change and ensure the successful acceptance of the workforce. As confident as AI is a pillar of Industry 4.0, it is all the more certain that an industrial revolution has never been possible without people. Organisational commitment is essential for the company's development and, therefore, at least as important as AI. In this context, we are not talking about engagement or attachment to the company but about commitment (U-tama 2023). Commitment to the company goes beyond engagement or connectedness. It is intended to represent the degree or strength of the company's connections and is an indicator of connectedness or, instead, belonging to the company. The higher the commitment to the company, the higher the motivation and work performance (Hunt et al. 2023).

RESULTS

Introducing artificial intelligence (AI) as a central technology of Industry 4.0 opens up enormous potential for innovation, productivity and economic growth. AI allows digitalising processes, increasing efficiency, and developing new products and services. Generative AI and Automating AI play a key role here by promoting creative solutions or optimising manual activities in production. However, the use of AI also brings with it ethical challenges that cannot be ignored. Questions of fairness, transparency, responsibility and respect for human autonomy are crucial to ensuring acceptance of and trust in AI systems. The ethics guidelines offer concrete approaches to minimise risks and uphold ethical principles.

The successful implementation of AI requires ethical behaviour and leadership. Managers play a crucial role by:

- Communicating visions for innovation,
- Empowering and supporting employees (empowerment and autonomy),
- Enabling fault tolerance and continuous learning,
- Providing resources and create a culture of open communication.

In addition, the social implications must not be neglected:

The fear of job loss, de-skilling and the need for up-skilling must be taken seriously. Targeted training measures and new employee perspectives can help shape change positively. A high level of organisational commitment from the workforce is essential for the long-term success of AI-supported innovations.

CONCLUSION

In conclusion, it can be said that AI is a driving pillar of Industry 4.0, making it possible to cope with demographic change, secure economic growth and enable innovation processes. For this to succeed, ethical, social and technological challenges must be addressed equally. A value-orientated and transparent implementation of AI ensures that the potential of this powerful technology is fully exploited – for the benefit of companies, employees and society as a whole.

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ЕТИЧНИ ПРЕДИЗВИКАТЕЛСТВА И УПРАВЛЕНИЕ НА ИНОВАЦИИТЕ: ИЗКУСТВЕНИЯТ ИНТЕЛЕКТ КАТО ДВИГАТЕЛ НА ИНДУСТРИЯ 4.0

Резюме: Бързото развитие на изкуствения интелект го превърна в ключов двигател на четвъртата индустриална революция. ИИ дава възможност на предприятията да цифровизират процесите, да оптимизират работните процеси и да насърчават иновациите, като използват две основни форми: Генериращ ИИ, който създава творчески резултати като текст и изображения, и Автоматизиран ИИ, който подобрява оперативната ефективност чрез автоматизация на процесите. Тези технологии се справят с предизвикателства като демографските промени и недостига на квалифицирана работна ръка, като допринасят за икономическия растеж и производителността. Прилагането на ИИ обаче поражда значителни етични и социални проблеми. Справедливостта, прозрачността, отчетността и човешката автономия трябва да бъдат взети предвид, за да се гарантира доверието и приемането им от служителите и обществото. Етичните рамки, като например Етичните насоки на ЕС, наблягат на предотвратяването на вреди, недискриминацията и защитата на данните. Етичното лидерство и ефективното управление на иновациите са от решаващо значение за успешното интегриране на ИИ. Лидерите трябва да насърчават визия за иновации, да овластяват служителите и да създават култура на отворена комуникация, толерантност към грешки и непрекъснато обучение. Отстраняването на страховете от изместване на работните места и подкрепата на инициативи за повишаване на квалификацията са от съществено значение за поддържане на организационната ангажираност. ИИ е основен стълб на Индустрия 4.0, който дава възможност за икономически растеж и иновации, като същевременно се справя с обществените предизвикателства. Ориентирането към ценности и прозрачно прилагане гарантира, че потенциалът му е от полза за бизнеса, служителите и обществото.

Ключови думи: ИИ, Изкуствен интелект, Индустрия 4.0, Етика

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

**BEST PRACTICES AND SOURCES OF ERROR: WHAT PROJECT
DOCUMENTATIONS REVEAL ABOUT THE SUCCESS
OF INFRASTRUCTURE PROJECTS**

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Abstract: *This study examines the practical outcomes derived from a systematic analysis of project documentation within the context of infrastructure projects. The aim was to identify recurring sources of error and best practices that influence the planning and execution of such projects. Qualitative content analysis was employed, involving the examination of various documents, including project plans, reports, and evaluation summaries. The key findings indicate that unclear communication structures, inadequate risk management, and the absence of systematic feedback mechanisms are common obstacles to project success. In contrast, projects that implemented standardized communication protocols and incorporated human factors into risk assessments demonstrated significant improvements. The analysis provides practical recommendations for optimizing project performance and underscores the importance of structured documentation processes. These findings contribute to new insights into how communication processes, risk management strategies, and feedback systems can be enhanced to ultimately increase the efficiency and effectiveness of infrastructure projects.*

Keywords: *Document Analysis, Infrastructure Projects, Communication Processes, Risk Management, Feedback Mechanisms*

INTRODUCTION

The key to assessing project quality lies in analysing its documentation. This process evaluates existing records (e.g., contracts, reports, plans, sketches, emails) to identify shortcomings or errors and develop strategies for optimization. In large, complex railway projects, such as those in German Railways, challenges like poorly documented processes, ineffective communication, and inefficient information sharing often hinder project quality. Mayring (Mayring 2015) emphasizes that thorough document review reveals problems, enabling solutions that enhance long-term project quality and uncover significant deviations affecting success.

Communication plays a central role in infrastructure projects. Alam and Gühl highlight the challenges posed by poorly defined communication structures and inadequate feedback mechanisms, which impact information flow and project outcomes (Alam, Gühl 2020). The human factor is equally critical, as Kerzner notes, stressing the influence of stress, miscommunication, and overload—factors often overlooked in favour of technical and financial risks (Kerzner 2022). These elements, however, are closely tied to decision-making and communication and must not be neglected.

The need to foster communication among project staff by building “communication bridges” (Müller-Rotenberg 2019) which enhance productive collaboration, is highlighted by Müller-Rotenberg. This approach can enhance technical performance and communication efficiency by integrating psychological and social aspects into project management. Such strategies contribute to better, long-term project outcomes and encourage the development of new management approaches.

RESEARCH METHODOLOGY

The central method of this research is qualitative analysis (Mayring 2015) of the contents of the documentation of a project. This method allows detailed examination of textual content and facilitates structural recognition of patterns and their interconnections. The basis of this method is the conceptual content analysis (Kukartz 2018). Where Mayring describes qualitative analysis of the contents of the

documentation as a single structured, clear, and strictly regulated method (Mayring 2015). Such a method gives clear and methodical results that give a detailed insight into the content of the entire documentation.

The method of Mayring is used in complex infrastructure projects to identify key elements and relationships within the documentation (Mayring 2015). These aspects are not immediately apparent. It is particularly valuable for gaining deeper insights into the meaning and context of texts, rather than just analysing data or facts superficially.

The main features of qualitative analysis of the content of the documentation stated by Mayring (Mayring 2015):

- Categorization,
- Analysis according to certain rules,
- Interpretation and parallel reflection,
- Clarity and directness (transparency).

By categorisation, it is understood that the text is broken down into smaller units (e.g. paragraphs, sentences, or individual terms) and, at the same time, categorizing those units (either inductive or deductive). Analysis according to certain rules also implies certain principles that must be followed. Furthermore, organising passages of text and understanding their meaning within the contextual and theoretical framework, clarifies the importance of the feature of interpretation. While the term reflection implies checking patterns and their interrelationships as well as their meaning, and at the same time what they specifically suggest for a research question or practical application. The whole process of analysis must be ensured through clarity and immediacy, i.e. transparency. This process must be present at every decision, from the very beginning of categorisation until the final interpretation and reflection.

The use of qualitative analysis of the content of documents in Research (Glaser, Strauss 1967):

This method was applied to the existing project documentation of infrastructure projects, including design plans, contracts, emails, reports, and construction records (Leimböck et al. 2017), to identify recurring errors, patterns, and typical textual structures. The analysis covered communication processes, risk management, and feedback mechanisms to systematically present both positive and negative aspects, all of which influence project development and outcomes.

The specific analysis was based on the principles of qualitative content analysis according to Mayring (Mayring 2015) and took into account the process execution in accordance with HOAI (Vygen, Jousen 2024) stages (tariff for architects and engineers). The first six main phases according to HOAI were directly analysed-from preliminary research, project development, through performance planning all the way to the completion of i.e., planning for project approval. Further categorisation was carried out according to Kuckartz, using coding techniques (Kuckartz 2018). In order to allow different projects to be compared and to analyse similarities and differences in planning and implementation processes, an approach based on Glaser and Strauss (Glaser, Strauss 1967) was used. This enabled the identification of systematic errors (El-Aboodi 2024) and success factors (Pfarr 1978).

This comprehensive combination of methods has identified, proven effective optimization strategies that can be successfully applied. It also revealed the sources of errors and clearly demonstrated their presence in the phases of the HOAI project processing process. In order to present the material of this research as clearly as possible, it is necessary to define the documents that were analysed:

1. Project Plans:

Project plans provide a structured and detailed picture into the project, its phases, and its resources. They are essential for identifying disagreements during planning and implementation, as well as potential sources of error.

2. Reports and Evaluations:

These documents provide feedback on the progress of the project within the phases in accordance with the HOAI and an assessment of the work performed. They serve as key challenges for the analysis and practical implementation of the project.

3. Protocol of Project-Related Meetings:

Each regular recording of meetings provides feedback on the progress of a project and an assessment

of the work performed within the phases in accordance with the HOAI. They serve to analyse the challenges and practical implementation of the project as well as to solve possible problems.

4. Contracts and Amendments:

The contracts regulate legal processes and as such provide insight into conflicts or adjustments during the project. Each change in a project, which must also be justified and documented, highlights the necessary changes that took place during a project as well as their influential further documentation.

5. Commissioning Documents:

These documents contain all relevant information for commissioning i.e. carrying out work, including necessary tests and verification of requirements. As such, they serve as a clear orientation and guidance in planning and its implementation and what possible difficulties have been encountered.

6. Construction Records:

Construction records contain detailed documentation of the construction site, such as building logs and daily reports. They are important for understanding the organisation of the construction process and possible unforeseen challenges.

RESULTS

In a detailed analysis of the above project documentation of infrastructure projects, there was a clear representation of several significant sources of errors that appear. Errors that contributed to challenges in the execution of project tasks and that affected the successful optimisation approach. The following results provide a detailed overview of the identified weaknesses and shortcomings as well as the effective strategies found in the tested projects.

Common Sources of Errors

Analysis of the project documentation revealed a number of recurring sources of errors that often caused repeated delays and process inefficiencies in infrastructure projects. The above sources of errors are mainly related to three central aspects of project planning and execution, namely, ambiguous communication structures, insufficient risk management in management, and lack of feedback processes.

1. Ambiguous Communication Structures

The absence of clear protocols in project meetings often caused misunderstandings and delays, particularly around responsibility assignment. This hindered both day-to-day management and long-term coordination. According to Polzin (Polzin 2021), well-structured communication processes and proper documentation are crucial for enhancing efficiency and collaboration.

2. Insufficient Risk Management

In risk management, the human factor is often overlooked, including aspects like stress, misunderstanding, and overload, which are rarely addressed. Edmondson highlights the psychological safety, fear, and insecurity that can arise in such situations (Edmondson 2018). This leads to underestimating risks and higher error rates. Mayring also emphasises that applying methods mechanically, without considering social and human factors, can negatively impact project performance at all stages (Mayring 2015).

3. Lack of Feedback Processes

The lack of feedback culture in many projects leads to insufficient correction of errors, limiting performance and process improvements. Kessler and Winkelhofer emphasises that continuous feedback is crucial for complex infrastructure projects, helping to identify and address weaknesses early on (Kessler, Winkelhofer 2004).

Best Practices

This research also identified successful approaches and best practices that have been applied in several projects. This has also resulted in significant improvements in communication, risk management, and feedback culture.

1. Standardised Communication Protocols

Clear communication guidelines in successful projects reduced misunderstandings and boosted efficiency. Sutter (Sutter 2022) highlights how such systems improve collaboration and lower project risks.

This is especially important in complex projects like infrastructure work for the German railway.

2. Risk management with a focus on human factors

Projects that implemented training, stress management, and error reduction programs saw fewer errors and more efficient workflows. By focusing on the human factor, these programs became central to project processing. Schneck highlights that considering social and psychological factors significantly enhances the effectiveness of risk management (Schneck 2010).

The following diagram shows a summary of the error sources listed (See Fig. 1): The diagram illustrates the most common sources of errors (above) and their corresponding best practices (below). He points out how identified shortcomings in the processing of a project can be improved by targeted measures to increase the success of the project.

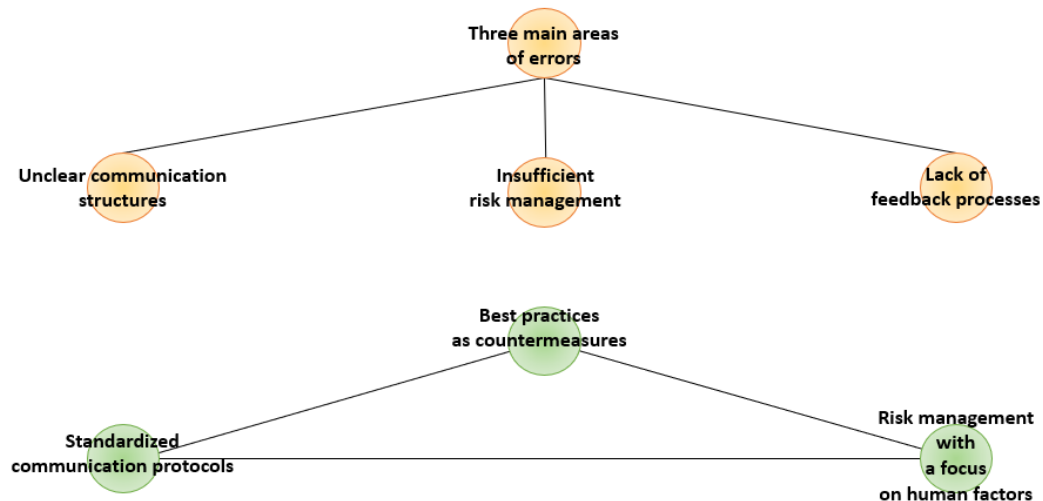


Fig. 1. Three main areas of errors and best practices

CONCLUSIONS

This research analysis highlights the critical importance of structured and well-designed processes in communication, risk management, and feedback mechanisms for the success of infrastructure projects. Many challenges, errors, and inefficiencies in project execution were linked to ambiguities or the absence of standardised processes. Implementing clearly defined, standardised procedures significantly enhances project quality and success.

Transparent communication is a key factor in project success. The lack of standardisation, clarity, and adequate protocols often led to misunderstandings, delays, and unclear responsibilities. Sutter emphasises that clear communication channels improve efficiency and reduce conflicts, particularly in complex infrastructure projects (Sutter 2022).

Risk management and human factors are also decisive for project success. Mechanical risk management methods often overlook psychological stressors like stress and misunderstandings, which contribute to errors and delays. Training and stress management programs have proven effective in mitigating these issues and optimising team performance.

Feedback mechanisms are vital across all phases of project management. This analysis showed that the absence of a structured feedback system consistently hindered improvements. Kessler and Winkelhofer argues that well-established feedback systems enable faster error correction, better schedule adherence, and higher efficiency (Kessler, Winkelhofer 2004). Continuous evaluation leads to improved project outcomes.

In conclusion, this research identified error sources in infrastructure projects and provided insights for optimising project management processes. It underscored the importance of standardised communication

protocols, human factor considerations in risk management, and structured feedback systems. These findings offer valuable guidance for future projects, helping project managers reduce errors and delays, and improve overall efficiency and success.

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НАЙ-ДОБРИ ПРАКТИКИ И ИЗТОЧНИЦИ НА ГРЕШКИ: КАКВО РАЗКРИВА ДОКУМЕНТАЦИЯТА НА ПРОЕКТИ ЗА УСПЕХА НА ИНФРАСТРУКТУРНИТЕ ПРОЕКТИ

Резюме: В това проучване се разглеждат практическите резултати, получени от систематичен анализ на проектната документация в контекста на инфраструктурните проекти. Целта е да се идентифицират повтарящите се източници на грешки и най-добрите практики, които оказват влияние върху планирането и изпълнението на такива проекти. Използван е качествен анализ на съдържанието, включващ разглеждане на различни документи, включително проектни планове, доклади и резюмета за оценка. Основните изводи показват, че неясните комуникационни структури, неадекватното управление на риска и липсата на систематични механизми за обратна връзка са често срещани пречки пред успеха на проекта. За разлика от тях проектите, които прилагат стандартизирани протоколи за комуникация и включват човешкия фактор в оценките на риска, демонстрират значителни подобрения. Анализът предоставя практически препоръки за оптимизиране на резултатите от проектите и подчертава значението на структурираните процеси на документиране. Тези констатации допринасят за нов поглед върху това как могат да се подобрят комуникационните процеси, стратегиите за управление на риска и системите за обратна връзка, за да се повиши в крайна сметка ефективността и ефикасността на инфраструктурните проекти.

Ключови думи: анализ на документи, инфраструктурни проекти, комуникационни процеси, управление на риска, механизми за обратна връзка

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

РОЛЯТА НА ЛИДЕРА ЗА МОТИВИРАНЕ НА ПЕРСОНАЛА

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Резюме: В тази разработка е направен анализ на ключовата роля на лидера и неговата способност да мотивира и да вдъхновява екипа за постигане на общата цел. Извършен е преглед на начина, по който е устроен работният процес, както и по-често срещаните причини да изгубиш мотивацията си за работа, която се задава от ръководителя, или другояче казано, от лидера в екипа. Изследвани са ролята на лидера да намира баланс между мотивация, контрол и делегиране, както и способността му да създава подходяща среда, в която всички се чувстват ценени и подкрепяни.

Ключови думи: лидер, ръководител, развитие, персонал, мотивация

УВОД

Актуалността на представената тема се определя от появата в края на XX и началото на XXI в. на безпрецедентен дефицит на идеи, концепции и модели за добро лидерство и градивно мотивиране и от засиленото търсене на нови ефикасни методи за работа под въздействието на мотивиращи фактори.

Лидерът е този, който трябва да умее да насочва хората в определена посока и да предприема необходимите стъпки, за да може организацията да достигне до набелязаната от ръководството цел. Ефективното управление на персонала предполага лидерът във всеки момент да е наясно не само какви резултати постигат хората, но и какво ги мотивира за работа, както и дали и в каква степен те са доволни от своя труд.

Тази разработка има за цел да фокусира вниманието върху някои ключови моменти от същността и значението на мотивационния процес и да изследва проблемите на мотивацията на персонала.

Направен е опит да:

- се анализират различните лидерски умения и компетентности;
- се очертаят основните насоки за създаване на едно добро ниво на мотивация и степен на удовлетвореност от дейността;
- се дадат препоръки за повишаване мотивираността на персонала.

Обектът на нашето внимание е лидерството и неговите характеристики. Наличието на добър лидер превръща предизвикателствата във възможности, а препятствията – в стъпала към успеха.

Развитието е невъзможно без лидер. Всяка сложна система функционира по ясно определени закони. Едни и същи закони на природата действат в различни общности по различен начин – някои да изпълняват конкретни функции, други да ръководят. Следователно системата винаги има лидер. Но винаги ли човекът, който седи на лидерския стол, е наистина лидер и каква е неговата роля? Той трябва да организира процеса и да води другите към поставената цел. Проблемът е, че не всеки мениджър е пълноценен лидер. И в такава ситуация никоя система не може да се развива. Рано или късно възникват нови предизвикателства, необходимост да се преодолее нова криза или спешно да се усвоят нови способности и т.н. Ако няма кой да ръководи тези процеси, организацията и нейният екип ще се окажат на кръстопът. И всичко това, защото няма добър лидер, който да извади хората от стария коловоз. Необходимо е някой да ръководи процеса на преминаване към друг, по-модерен начин на работа. Ако такъв човек не бъде открит навреме, промените няма да настъпят. И ако в бързо променящите се условия не се променят старите парадигми на поведение, резултатът ще е значително спадане рентабилността на компанията.

Лидерството е изкуство, но как да го предадем?

Въз основа на концепцията за лидерството като начин на осъществяване на дейността е направен опит да се проследят зараждането, развитието и вариантите за сполучливо лидерство. Проследяват се елементите на лидерския процес, тяхната характеристика като такива и взаимодействието им. Защото зад успеха на утвърдените в различните сфери организации стоят добрите лидерски практики, управляващи успешно високия професионализъм на екипите и обединените усилия към постигането на общата цел. Действащите в организацията условия и практики като работна среда, въвеждане на новоназначените колеги, оценяване на представянето, възможностите за обучение и развитие, признанието на труда са гаранция за ефективността на процесите и предпоставка за достигане до търсените резултати. Лидерът трябва умело да споделя знание и експертиза с членовете на своя екип и да ги подкрепя в тяхното кариерно развитие и последваща реализация. От друга страна, той трябва да изисква споделянето на обратна връзка за това как, според тях, би могла да се подобри работата.

През целия живот човек живее и действа като част от различни групи и се влияе от официални и неформални лидери. Всеки път, когато се събере група от повече от двама души, това може да създаде ситуация, в която хората са разделени на **лидери и последователи**. Йерархията на ранговете неизбежно се развива, когато групата расте количествено. В даден момент от съществуването си някои членове на групата започват да играят по-активна роля в организирането на съвместни жизнени дейности и да заемат водещи роли. В думите им се вслушват, на тях се обръща по-голямо внимание, отколкото на думите на другите членове.

Ролята на лидера става решаваща, когато групата се сблъска с препятствие, заплаха или сложна критична ситуация, изискваща съвместни, добре координирани действия. Успешното излизане на групата от такава ситуация и изпълнението на поставената задача до голяма степен се определят от организаторските способности на лидера. Той **трябва да може**: да организира групата; да гарантира, че членовете разбират какви стъпки трябва да се предприемат за постигане на целта; да мотивира последователите да решават поставените задачи; да контролира резултатите от съвместната дейност и т.н.

Човек, който успешно се справя с тези функции, е надарен с допълнителна власт от групата. Той става пръв, взема решения, управлява групата, издава санкции и награди. Ръководителят на организацията има подобни функции и права. Въпреки това той ги придобива при назначаване на длъжност. Поради необходимостта от подчинение на ръководителя се предоставят длъжностни характеристики и отговорности на подчинените, сключват се споразумения и договори. По този начин можем да признаем, че мениджърът и лидерът имат редица подобни функции, но легитимността на тяхното използване се основава върху различни източници на „**психологическо финансиране**“. Предмет на нашето разглеждане е преди всичко организационното лидерство и особеностите на неговото проявление в дейността на лидера.

Лидерът е добър мениджър, а добрият мениджър трябва да е и лидер. Тези две понятия трябва да са неразделни. За всяка организация е важно всички служители, ръководещи отделните сфери на дейност, да притежават лидерски качества. Те трябва преди всичко да управляват процесите и да умеят да ги променят, адаптирайки ги към съвременните условия. Следователно лидерът не е задължително да е човек, чиито команди се изпълняват безусловно от всички. Но той трябва да бъде истински професионалист в своята област, способен, първо, да разбере какви цели трябва да си постави в момента и второ, да може да постигне целите си, като мотивира екипа за това.

Всеки лидер формира свой тип управление. Ако внимателно анализираме всеки от тях, можем да разберем колко е важно ясно да се определи целта на компанията. Защото погрешният избор на тип управление може да се окаже и ограничаващ фактор, който няма да позволи да се поставят правилните задачи и следователно ще възпрепятства еволюционния процес на развитие и постигане на успех.

Какъв трябва да е лидерът? След като се определи какви цели си поставя организацията и какъв стил на управление е най-приемлив за нея, трябва да се обърне внимание на личността на самия лидер. Много са аргументите, че истинският лидер трябва да бъде решителен, инициативен, способен смело да въвежда иновации, да разбира служителите и т.н. Но едва ли ще намерим лидер,

който наистина да притежава всички качества заедно. В действителност няма идеални хора и лидерите не са изключение. С течение на времето не само силните, но и слабите им черти задължително започват да се проявяват. Но тъй като съвместната работа в една система винаги зависи не само от лидера, но и от всички членове на екипа, който трябва да включва и други лидери, е необходимо да се създаде система, в която те да могат ефективно да взаимодействат помежду си. Необходима е способност за адаптиране към бързо променяща се среда и вземане на съгласувани новаторски и креативни решения. Лидерът е душата на целия процес. Той дори не трябва да прави нищо сам. Достатъчно е да познава добре работата на организацията и да умее да комбинира по най-правилния начин работата на всички части на екипа в едно цяло.

Осигуряване на подготвени кадри за подпомагане на персонала в процеса на неговото мотивиране

Ролята на лидера се проявява особено ярко при необходимост от мотивиране, която необходимост може да възникне както при изпълнение на обичайните дейности, така и в контекста на специфични условия и ситуации – природни бедствия, катастрофи, производствени аварии, терористични актове и др. **Кризисните ситуации и екстремните условия** значително намаляват надеждността на работата на служителите, както и взаимопомощта, което често води до невъзможност за изпълнение на професионалните задачи, а в някои случаи до организационна и управленска криза.

Лидерите мотивират групата да вземе мерки за управляването на мотивационния процес. По този начин се повишава нейната (на групата) ефективност при изпълнение на поставените задачи.

Както вече беше отбелязано, много са теориите за това какво е лидерството и какъв трябва да бъде лидерът, те са се развивали във времето до днес, обуславяни от конкретните исторически, социални, етнически, икономически, политически и прочее условия. В **„Мениджмънт на бъдещето“ Питър Дракър** отбелязва, че единственото определение за лидер е *„някой да има последователи“*. Днес на лидерството се гледа не само като на способност да увеличаваш хората след себе си. Счита се, че то е процес, в който човек влияе върху другите членове на групата за постигане на нейните цели и тези на организацията като цяло.

В тази връзка едни от най-важните лични качества, които лидерът трябва да притежава, са **решителността, дързостта и упоритостта**. Необходимо е да си решителен и упорит, и то зарадително, особено щом става въпрос за решаване на определена задача.

Целеустремеността е друго качество, без което лидерът просто няма да е успешен мотиватор – не изпускай целта от поглед, преследвай я, каквито и пречки да се появят, търси начини и средства за преодоляването или отстраняването им, но не се отказвай, нито се отклонявай ненужно от нея. Целта е нужна не само на водача, тя трябва да е ясно формулирана и разкрита пред всички под него, ако иска да може да разчита на тях, на екипа, във всеки един момент.

Информираността, знанието за предстоящото, за очаквани трудности са от изключително значение за по-лесното и бързо адаптиране на групата към тях и по-бързото им преодоляване. Всеки трябва да знае какво, как и защо върши, с какво и кога (по възможност) ще се сблъска. Личната увереност в успеха е толкова важна за групата, колкото и за самия водач, тя заразява и окуражава и другите.

„Ефективното мотивиране включва:

- **ПЪРВО:** изграждане на подходящи групи (екипи) от хора, ръководени от лица, които притежават необходимите качества и осъществяват подходящи за конкретната ситуация действия. Лидерът трябва да осигури използването на качества и творческите възможности на всеки член на групата, която ръководи. Той обединява различните цели на индивидите и ги съгласува с общите такива. Ефективният лидер знае, че главното е да гледаш на хората като на личности;
- **ВТОРО:** създаване и поддържане на определена култура в групата, на ценности и правила, които трябва да се спазват;
- **ТРЕТО:** създаване на атмосфера на доверие и подходящ климат в колектива. Взаимното доверие спомага както при изграждането на взаимоотношенията между лидера и членовете

на колектива, така и при осъществяването на междуличностните отношения вътре в групата, особено важно в специфичните армейски условия;

- **ЧЕТВЪРТО:** използване на поведението на лидера като модел за подражание. „Прави това, което правя аз“ е девизът на добрите лидери, които те реализират в своята практическа дейност;
- **ПЕТО:** предлагане и реализиране на нови идеи. Ефективният лидер е и творческа личност, която може да генерира нови идеи и да увеличи и другите при тяхното изпълнение. В много случаи именно творческите способности и нестандартният подход при решаването на проблемите отличават лидера от останалите членове на групата и така той ги мотивира за успешни действия.“¹

Лидерството, водачеството трябва да се ориентира към необходимостта хората да бъдат по-гъвкави. Затова все по-често се изисква делегиране на правото за вземане на решения на по-ниско управленско ниво и се правят опити да се осигури разбирането на общите задачи от всеки един. Днес по-важно от всякога е всеки ръководител да разбере кое мотивира поведението на личността и да определи начините, по които може да ѝ влияе, защото в крайна сметка всичко зависи от хората.

Ръководителите трябва да изучават изкуството на мотивацията, за да могат да разчитат на групата. Защото днешните лидери се сблъскват със задачата да създават екипи от съвсем различни по характер и опит хора, при това знаещи и информирани личности. Сега и заплахите са нови, различни, бързо променящи се, изискващи днешният успешен лидер да притежава уменията за адаптация към промените, готовност за реакция в непрекъснато изменящата се среда.

Кой е истински лидер? Това е човек, който реализира обществени интереси. Лидерът стимулира прогреса в обществото, осигурявайки движение напред. Той поема тази роля доброволно и съзнателно. Лидерът винаги си поставя цел, създава условия и подбира хора и средства за постигането ѝ. Ето защо е толкова важно всички процеси да се ръководят от лидери.

Истинският лидер се характеризира с вроден потенциал и професионализъм в работата си. Той допринася за развитието и не се поставя на първо място. Дори понякога може да остане напълно незабележим. Основното е стриктно преследване на целите. Ефективният лидер знае как да общува с хората, да говори пред публика, има дипломатически умения. Лидерът добре разбира, че всички хора около него имат свой собствен набор от способности и недостатъци. Затова той може да работи ефективно с този „материал“. С други думи, лидерът не влиза в конфликт със системата, но съобразявайки се с наличните условия, създава своя собствена организация за ръководене и управление на процесите. За добрия лидер е важно да не взема страна в конфликтите, които възникват в екипа, а да управлява тяхното разрешаване.

Следователно лидерът трябва да притежава някои основни качества като: рационално мислене; амбиция, воля и желание за постигане на целта; да обича работата си; да бъде професионалист; да умеє да се изолира от текущите проблеми и да се съсредоточава върху основното; да има добра интуиция. В този ред на мисли не трябва да се пренебрегват и омаловажават факторите, които пречат на човек да е добър на лидерската позиция. Понякога той трябва да жертва собственото си „Аз“, да обръща по-малко внимание на собственото си кариерно развитие, социално израстване и т.н. Той трябва да има време за пълноценна и качествена почивка и да е способен да управлява правилно свободното си време.

Типологизация и класификация на мотивационния процес

Според **И. Христов** съществува схема, изградена от „**четири елемента**“, по която да се направи това, а именно:

1. **Първият** елемент е неговата функция в конкретната специфична ситуация.
2. **Вторият** е „свърхзадачата“, която се изпълнява.
3. **Третият** елемент показва мястото и ролята на мотивацията.
4. **Четвъртият** елемент разкрива субективните представи на лидера и неговото обкръжение за спецификата на целите и задачите на дейността им.“²

Целесъобразно, а в някои случаи и наложително е да се типизират проблемите, които се решават от лидера, както и условията при вземане на управленските решения с цел успешно мотивиране.

Най-често **типизацията** на проблемите става по:

а) **важността** на проблема; по този признак те се разделят на:

- изключително важни;
- значими;
- несъществени.

От това разделяне зависи и какво внимание, както и колко ресурси ще се отделят за решаването на проблема.

б) **времето за решаване** на проблема; според този признак проблемите могат да бъдат:

- неотложни – те трябва да се решават веднага;
- спрочни – следва да бъдат решени в определен срок;
- такива, които могат да се отлагат.

в) **очакваните резултати** – те могат да бъдат със значителен или незначителен ефект.

За да умеят да мотивират, лидерите в крайна сметка трябва да се стремят да бъдат добри лидери, които водят подчинените си за успешното решаване на задачите и постигането на целите, като търсят нови, непознати и ефективни пътища за това.

Добрите лидери мотивират подчинените да направят повече, отколкото очакват. Те имат собствени представи за нещата и са творчески личности. Имат умения, които ги отличават от останалите мениджъри и са особено ценни и полезни по време на специфичните дейности, които могат да бъдат от най-различен характер.

За да умее да мотивира, лидерът трябва да бъде **ефективен**. Това е човек, който умее да създава вдъхновяваща визия за бъдещето, да мотивира хората да участват в тази визия, да управлява процесите, да изгражда и обучава екипа, за да бъде максимално ефективен в постигането на целите.

Доказано е, че високото ниво на мотивация на служителите позволява да се опрости процесът на управление и да се постигнат по-бързо организационните цели чрез намаляване на контрола върху дейността на управленските субекти и оптимизиране на тяхната работа.

Днес един от основните проблеми на управлението на персонала е трудността да се изгради ефективна система за мотивация за трудова дейност. Защото мотивацията е най-важният фактор за ефективността и производителността на служителя и като такъв формира основата на неговия трудов потенциал, тоест целия набор от свойства, които влияят върху производствената дейност. Мотивацията е една от функциите на управлението. Най-общо мотивацията е набор от движещи сили, които трябва да владее и управлява всеки лидер, за да насърчава човека да действа в желаната посока. Лидерът е наясно, че тези сили са индивидуални за всеки човек, намират се „вътре“ в него или действат отвън, принуждавайки го съзнателно или несъзнателно да извършва определени действия.

Лидерът разбира, че основната роля на мотивацията в една организация е, че тя въздейства върху персонала чрез различни колективни и индивидуални стимули за ефективна работа. Той ясно осъзнава, че ръководството може да отдели много време и пари за подобряване организацията на работа, намиране на оптимални структури, разработване на дългосрочни планове и стратегии и използване на най-нови технологии, но това няма да даде никаква принадлежна стойност, ако хората, работещи в организацията, не са лично заинтересовани от успеха.

Организационните лидери трябва да вземат предвид както груповите, така и индивидуалните стимули за поведението на персонала. Ясно е, че индивидът ще се стреми да участва в постигането на групова цел до степен, в която групата удовлетворява неговите собствени нужди и стремежи. Ръководителят трябва да предоставя част от правомощията си на подчинените служители за решаване на конкретна задача. Това повишава тяхната мотивация, формира у тях чувство за принадлежност към общата кауза и възпитава отговорност за постигане целите на организацията.

Една от формите на влияние върху поведението на подчинените е наставничеството, което се основава на компетентност, т.е. на власт на неформална основа. Корпоративната система за мотивация е набор от взаимосвързани методи за мотивиране на персонала, чието създаване се извършва в съответствие с условията на външната и вътрешната среда и е насочено към постигане на стратегическите цели на организацията.

Мотивацията трябва да осигурява баланс и фокус върху приоритетите. Естествено, съществуват ситуации, при които някой от елементите изпъква на преден план като най-важен за конкретния

момент, но те могат да бъдат адекватно променяни и управлявани само като резултат от намесата на останалите фактори. Ключът към всичко това са предпоставките, които се създават от лидерите на системата – вярата в индивида и в неговите цели. Способностите за самоуправление и нуждите на персоналният статус определят степента на предизвикателство и склонността към експерименти. Без изключения ограниченията на организационното съвършенство се контролират от допусканията и предположенията на лидерите за това какво е възможно и целесъобразно за всички.

Необходимостта лидерите да притежават способности, адекватни на условията на средата, и то в целия спектър отговорности, изисква непрекъснато развитие на схващанията за тяхното използване в съответствие с обективните реалности и развитието на съвременните теории. Мотивирането се явява предизвикателство за обединяване способностите на подчинените като компоненти на единна, ефективна и съвместна система, която да действа успешно, без това, разбира се, да затруднява евентуални автономни действия на отделните компоненти.

Днес изследователите продължават своите търсения в откриването на най-ефективната мотивация, на най-подкрепящата лидера ситуация в бързо изменящата се среда. Лидерите са тези, които могат да вдъхновяват подчинените си за велики дела. Защото лидерите са носителите и проводниците на ценностите на организационната култура.

Мотивацията, включително умението да мотивираш самия себе си, е философия за живота. Всеки трябва да се опитва да бъде мотиватор, който докосва живота на другите, добавя истинска стойност в света и оставя след себе си трайно наследство. Всъщност можем да обобщим, че е създаден модел на мотивацията като многостепенен процес, който включва понятията: потребности, насоченост, награди. Ръководителите трябва да се отнасят сериозно към проблемите на мотивацията. Нужни са им теоретични знания в тази област, за да могат да намират най-добрите практически решения за мотивиране на подчинените си.

Съществуват правила и стратегии за мотивацията, които не трябва да се пропускат от работодателите, ако искат успешност в екипите си, и те са следните:

- да познават потребностите на подчинените си;
- да проучват не само нуждите, но и желанията им;
- да градират факторите за мотивацията за отделните индивиди;
- да не забравят, че парите не са единственият стимул, към който хората се стремят;
- да се отчита влиянието на обществените и лични предпоставки;
- да има награда след по-ефективната и добре свършена работа;
- познаването на психологическите типове да се използва при мотивирането на личния състав;
- да има обективност и справедливост в оценките и възнагражденията.

ИЗВОДИ

Обобщавайки казаното дотук, могат да се извлекат следните изводи:

1. Не съществува най-ефективен подход за мотивиране, а резултатите са най-добри, когато има съответствие между изискванията на лидера, на подчинените и на задачите. То силно се повлиява от два фактора: комплексността на задачите и променливия състав на групата.

2. Високото ниво на мотивация на служителите позволява да се улесни процесът на управление и постигане на организационните цели чрез намаляване на нивото на контрол върху дейностите на субектите на управление, оптимизиране на работата им от самите служители, минимизиране на времето и разходите за убеждаване на служителите в необходимостта от промени и тяхното прилагане.

3. В света на управлението един от ключовите елементи за успех е лидерският стил. Той влияе върху мотивацията на персонала, посоката на развитие на компанията, нейната корпоративна култура и като цяло нейната ефективност и конкурентоспособност.

4. Умението да мотивира подчинените си е едно от най-важните качества на добрия лидер. Ако искаме подчинените ни да постигат добри резултати, трябва да ги мотивираме – т.е. да ги накараме да искат онова, което трябва да поискат.

ЗАКЛЮЧЕНИЕ

Казват, че лидерът е човек, който знае какво иска, знае накъде върви и защо отива в тази посока. Проучванията сочат, че ако човек знае отговорите на тези три въпроса, ще бъде успешен лидер. Но винаги е трудно да се предвиди дали човек ще стане успешен лидер въз основа единствено на неговите личностни черти. Необходимо е да се вземат предвид формиращата среда и обстоятелствата, в които се проявяват лидерските качества. Очевидно, за да станете лидер, не е нужно да сте човек с изключителни способности. Понякога е достатъчно да сте на точното място в точното време и да се възползвате максимално от обстоятелствата. В търсене на идеален лидер екипите сами избират какви качества и характеристики трябва да притежава човекът, който ще ги ръководи. Не е лесно да се предположи какъв лидер ще предпочете един екип, но е ясно, че той трябва да може да вдъхновява и ръководи екипа към споделен успех и да бъде истински катализатор за постигане на изключителни резултати.

Развитието на лидерските умения е процес, който изисква задълбочена самооценка, навременна обратна връзка и непрекъснато самоусъвършенстване. Всичко това ще ви помогне да станете по-добър лидер. Независимо от избрания стил на управление не забравяйте, че най-важното в лидерството са вниманието към вашия екип и познаването на неговите индивидуални и групови потребности. Защото лидерите се следват не заради формална власт, а заради доверието и уважението, което са изградили. За да искат членовете на екипа да са на ваша страна във всичко, те трябва да ви вярват безрезервно.

Комуникативност, толерантност, целеустременост, воля, емоционална интелигентност – тези и още много други качества стоят в основата на **комплексното умение да бъдеш лидер** – едно от най-ценените през XXI в. Затова се стремете да бъдете успешни лидери и отлични отборни играчи. Защото, за да бъде ефективен един ръководител, той трябва не само да се учи от опита на своите предшественици, но и едновременно да вижда съвременните предизвикателства и да отговаря на изискванията на времето. Важно е да познавате съвременните тенденции в лидерството, защото това ще ви помогне да бъдете лидерите на бъдещето.

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THE ROLE OF THE LEADER IN MOTIVATING STAFF

Abstract: This paper analyzes the key role of the leader and his/her ability to motivate and inspire the team to achieve the common goal. A review of the way the work process is organized is carried out, as well as the more common reasons for losing the motivation for work, which is set by the manager or in other words by

the leader in the team. The role of the leader is studied in finding a balance between motivation, control and delegation, as well as his/her ability to create an appropriate environment in which everyone feels valued and supported.

Keywords: *leader, manager, development, personnel, motivation*

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

**THE ROLE OF MEDIA TRAINING IN CRISIS FOR EXECUTIVES
AND REPRESENTATIVES**

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Abstract: *This study analyses the importance and effectiveness of media training as a crisis communication tool and its role in overcoming crisis situations. The aim of the study is to analyze the development and optimization of flexible communication strategies in order to strengthen managers and spokespersons in their ability to appear confident and credible in public. This topic is particularly relevant due to the changing communication landscape and the increasing demands for transparency and responsiveness from companies. The methodological basis of the work comprises a detailed literature review and the analysis of case studies. Theoretical models and practice-orientated approaches are critically evaluated in order to highlight their potential and challenges. The analysis shows that well-planned media training with practical methods, such as simulations and role-playing, can strengthen the crisis resilience of organizations. It also emphasizes the importance of intercultural sensitivity and the integration of digital technologies in order to meet the dynamic requirements of modern crisis scenarios. The results illustrate that media training makes a significant contribution to safeguarding a company's reputation and building long-term trust with internal and external stakeholders. The work offers valuable practical recommendations for companies and lays the foundation for future research into the long-term implementation of such training in different organizational contexts.*

Keywords: *media training; crisis situations; executives and representatives; communication strategies*

INTRODUCTION

Crises are commonplace in the corporate landscape and represent an unavoidable challenge. The way in which companies respond to such events affects not only their short-term crisis management, but also their long-term reputation, credibility and survival. Whether financial problems, ethical conflicts, natural disasters or technological disruptions – every form of crisis has the potential to shake stakeholder confidence and jeopardise the stability of companies. Targeted and flexible crisis communication plays a decisive role, particularly due to the growing importance of social and digital media, which enable rapid dissemination and influence on public perception. This academic paper is dedicated to the question of how media training can enable managers and spokespeople to successfully master crisis situations.

The aim of this study is to analyse the importance of structured communication training and the development and continuous optimisation of flexible communication strategies in crisis situations. The focus is on identifying effective approaches for modern crisis scenarios. Media training should help managers and spokespeople to appear confident and credible in public. These tools are becoming increasingly relevant, especially in the context of the changing communications landscape and the rising expectations of transparency and responsiveness from companies.

In order to fulfil this objective, the work is methodically based on a detailed literature review and the analysis of case studies in order to combine theoretical principles with practical findings. Existing models and approaches are critically evaluated in order to highlight their strengths and weaknesses. This enables a well-founded examination of the connections between media training and effective crisis management.

The thesis is structured as follows: The second chapter covers the theoretical foundations of crisis communication, including definitions of key terms and the responsibilities of managers and spokespeople. Chapter 3 examines the role of media training as a crisis communication tool and analyses its methods.

FUNDAMENTALS OF CRISIS COMMUNICATION

Crisis situations pose enormous challenges for companies, and the way in which they communicate is crucial to their success in overcoming them. The following sections highlight the key elements of corporate communications in times of crisis, including the definition and importance, the role of leadership and the need for effective media training. In addition, the development and adaptation of strategic communication guidelines is discussed in order to meet the different requirements in crisis scenarios and to create trust among stakeholders. The fundamental role of crisis communication for the long-term success of a company is thus emphasized.

Definition of corporate communication during crisis

Corporate communication in times of crisis plays a crucial role in protecting the company's reputation and building long-term trust. Transparency is a key element here, as companies are expected to provide precise and up-to-date information in crisis situations. This helps to avoid speculation and rumors and counteracts a potential loss of reputation (Schwarz et al. 2017). Studies have shown that companies with a proactive and well-coordinated communication strategy are better able to minimize damage to their reputation. Redundant mechanisms in the communication structure can have a supporting effect here (cf. Boin, McConnell 2007). At the same time, crisis communication opens up the possibility of strengthening the brand image and gaining the trust of new target groups through authentic and empathetic behavior, which, however, requires consistently stringent and coherent communication (cf. Boin, McConnell 2007). Mistakes in crisis communication, such as incoherent statements or delays, can result in lasting reputational damage (Schwarz et al. 2017).

Crises can have a significant impact on the public perception of a company. The assessment of a company's ability to act and expertise is often negative if communication is perceived as inadequate (see Schwarz et al. 2017). This is particularly evident in the case of expressive reputation, which encompasses a company's ability to communicate emotionally and empathetically and is often rated worse in crisis contexts (cf. Schwarz et al. 2017). Effective crisis communication not only influences the acute perception of the organization, but also has a long-term impact on the willingness of stakeholders to continue supporting the company (cf. Boin, McConnell 2007). Inadequate communication can also lead to a long-term loss of trust, which emphasizes the need for clear and well thought-out communication strategies (cf. Schwarz et al. 2017). Those responsible are faced with the challenge of managing public expectations while simultaneously minimizing emotional reactions from the public (cf. Winkelman 1994).

In a changing media landscape, adaptability and transparency are key aspects of crisis communication. Companies must react flexibly to dynamic scenarios and at the same time apply clear guidelines that leave room for spontaneous adjustments (cf. Boin, McConnell 2007). The growing speed of information dissemination through social media significantly increases the need for adaptability. Companies must ensure that their communication strategies are flexible and scalable in order to professionally manage unexpected developments (cf. Arner et al. 2016). Transparency is essential in order to build trust and prevent rumors. A situation-specific prioritization of communication reduces the risk of contradictory statements and strengthens credibility (cf. Schwarz et al. 2017). In addition, companies must always maintain a balance between the public provision of information and the protection of internal confidentiality in order to minimize legal and ethical risks (cf. Boin, McConnell 2007). Structural flexibility in communication processes is necessary in order to meet the requirements of the digital media landscape (cf. Schwarz et al. 2017).

The consideration of multicultural perspectives is an indispensable component of effective crisis communication. Cultural differences can have a significant impact on the perception and success of communication measures, especially in a global context (cf. Winkelman 1994). Intercultural sensitivity is necessary to avoid misunderstandings and promote local acceptance. Studies show that culturally specific communication strategies are more effective in building trust and securing long-term relationships, which emphasizes the need for culturally adaptive guidelines (cf. Schwarz et al. 2017). The ability to identify and respond to potential cultural tensions at an early stage significantly increases the efficiency of crisis management (cf. Winkelman 1994). Companies that employ management staff with intercultural competence benefit from faster and more effective crisis management in multicultural contexts (cf. Winkelman 1994). In

the long term, the integration of multicultural perspectives promotes both crisis resilience and sustainable relationship management with international target groups (cf. Boin, McConnell 2007).

Digital platforms and social media have significantly increased the complexity of crisis communication. The real-time dissemination of information demands a proactive communication strategy that integrates both traditional and digital channels. Social media act as amplifiers, enhancing the speed and reach of communication, which compels companies to effectively monitor and strategically manage these channels (cf. Arner et al. 2016). By strategically leveraging digital platforms, crisis managers can not only shape public discussions proactively but also correct misinformation more swiftly (cf. Boin, McConnell 2007). Carefully prepared content and rapid response times are crucial to effectively addressing both internal and external stakeholders (cf. Arner et al. 2016).

Innovative technologies, such as predictive analytics, provide companies with the ability to identify potential crisis developments early and adjust their communication strategies accordingly (cf. Schwarz et al. 2017). Integrating digital technologies into the planning models of future communication strategies is therefore essential to meet the demands of modern crisis scenarios (cf. Arner et al. 2016).

In summary, the importance of corporate communication during crises lies not only in protecting reputation but also in building long-term trust. This requires a combination of transparency, adaptability, intercultural sensitivity, and the effective use of digital technologies.

Role and Responsibility of Leadership

The responsibility of leaders in crisis situations encompasses a wide range of tasks aimed at enabling coherent and effective crisis management. Leaders are central to strategic decision-making processes, focusing on reducing uncertainty and fostering organizational resilience. Studies highlight that effective leadership is characterized by the ability to strengthen resilience while responding flexibly to unforeseen challenges (cf. Williams et al. 2017). Decision-making requires a balance between speed and caution, particularly in the early stages of a crisis, to build trust and provide clear direction (cf. Boin 2009). However, it is critical to note that the complexity of modern crises often overwhelms leaders, necessitating structural support and the implementation of interdisciplinary teams. This raises the question of whether leaders alone can efficiently meet all requirements.

Resilience is a key concept that enhances an organization's overall ability to handle crises. Leaders play a central role in promoting resilience through proactive planning and the implementation of specific measures (cf. Williams et al. 2017). The ability to dynamically adapt existing strategies proves necessary to maintain organizational stability. Nonetheless, it remains unclear how resilience can be institutionalized long-term within organizations, as many initiatives focus on short-term crisis response without creating sustainable structures. This underscores the need for further research to establish resilience as a core component of organizational strategies.

An essential aspect of successful crisis leadership is the prioritization of resources. Leaders must make rapid yet informed decisions on allocating limited resources to stabilize key organizational functions and mitigate damage (cf. Fearn-Banks 2016). This decision-making capability is significantly influenced by strategic planning and the ability to efficiently gather information (cf. Boin 2009). Leaders who systematically incorporate feedback from previous crises are better equipped to manage resource-intensive challenges (cf. Sutcliffe et al. 2017). However, it remains uncertain to what extent cultural differences in global organizations impact resource prioritization.

Building trust is one of the most challenging tasks for leaders in crisis situations. According to Boin (2009), trust is essential for ensuring an organization's credibility and stability. Clear and consistent communication provides the foundation for minimizing uncertainty and strengthening emotional bonds with both internal and external stakeholders (cf. Gregory, Bauer 2007). Significant challenges arise in multicultural contexts, where varying perceptions of trust and credibility must be addressed (cf. Sutcliffe et al. 2017). Leaders who enhance the cultural sensitivity of their communication are better positioned to avoid misunderstandings and establish sustainable trust. Despite these insights, the systematic integration of cultural dimensions into communication strategies is often insufficient, necessitating deeper consideration and development of this approach.

Another critical element of successful leadership during crises is ensuring transparent communication. Leaders must convey complex information promptly and clearly to reduce public uncertainties and uphold organizational credibility (cf. Gregory, Bauer 2007). The use of digital platforms and social media is increasingly important, as they significantly expand the reach and efficiency of communication (cf. Boin 2009). However, digital communication also presents risks, particularly regarding the spread of misinformation or perceptions of surveillance mechanisms. Therefore, careful strategic planning and the simultaneous consideration of ethical aspects are required to address the challenges of digital communication.

A coherent approach to internal and external communication is crucial for leaders. Harmonizing communication strategies minimizes potential contradictions and strengthens organizational credibility (cf. Gregory, Bauer 2007). Internal communication flows should be supported through clear channels and regular updates to reduce uncertainties and foster collaboration within the organization (cf. Fearn-Banks 2016). However, many organizations rely on improvised communication approaches during crises, emphasizing the need for structural preparation.

The ability to learn from experience is indispensable for strengthening an organization's long-term resilience. Leaders who systematically integrate feedback from past crises contribute to the continuous improvement of organizational processes (cf. Sutcliffe et al. 2017). Reflection and follow-up provide opportunities to identify weaknesses in previous strategies and optimize future responses (cf. Williams et al. 2017). However, there is still a need for research to develop standardized methods for the structured follow-up of crises to support learning processes at all organizational levels.

The personality of leaders plays a decisive role in the perception and management of crises. Confident and empathetic leaders not only enhance interpersonal communication but also strengthen trust and stability within the organization (cf. Gruber, Shepherd 2017). Particularly in crisis situations, organizations benefit from leaders who demonstrate authenticity and integrity and responsibly make difficult decisions (cf. Boin 2009). Nevertheless, the question remains unanswered as to how personality traits can be specifically fostered or optimized through training to enhance leadership effectiveness during crises.

In conclusion, the complex responsibilities of leaders in crises require strategic thinking, flexible action, and a high level of communication competence.

MEDIA TRAINING AND CRISIS COMMUNICATION

Effective preparation for crises requires comprehensive media training specifically tailored to the challenges of crisis communication. This training focuses on the development of precise communication skills, adaptation to cultural differences, and the use of modern digital technologies. The following sections explore both the objectives and methods of these training programs, as well as the necessity of carefully designing internal and external communication strategies within crisis management. These aspects are crucial for safeguarding corporate reputation and fostering stakeholder trust in critical situations.

Objectives and Methods of Media Training

Media training is an essential element in preparing for public crisis communication and serves to equip executives and spokespersons in companies with the skills to communicate precisely, clearly and confidently in critical situations. Such training strengthens confidence in one's own performance and minimises the risk of miscommunication, which is of fundamental importance, especially in crisis situations. Research findings underscore the relevance of these measures by showing that authentic communication and the avoidance of contradictory or unclear statements contribute significantly to gaining the trust of internal and external stakeholders and to protecting the company's reputation (see Cornelissen 2023). Practice-oriented approaches foster the ability of leaders to critically review and adapt communication strategies, enabling them to appear professional and confident in real crisis scenarios (cf. *ibid.*).

The application of practical methods within media training, including realistic simulations, is of particular value. These enable participants to develop and strengthen communication skills in a controlled environment. In particular, re-enacting specific crisis situations, such as interviews or press conferences, helps to improve participants' ability to deal with pressure and critical media inquiries (cf. Novak, Roither 2016). Interactive formats such as role-playing not only promote practical skills, but also cooperation within

teams, which can be an invaluable advantage in crisis situations, which are often characterised by a high need for coordination (see *ibid.*). Such methods also enable participants to receive direct feedback, which allows individual weaknesses to be specifically addressed and strengths further developed.

A central focus of media training is on developing and formulating consistent messages that can be communicated clearly and convincingly in crisis situations. The aim is to build trust among stakeholders and maintain the company's credibility (see Faden, Neuts Ang 2023). Consistent communication minimises the risk of misunderstandings and mitigates potentially negative effects on public perception. Particularly in dynamic crisis situations, the flexible adaptation of messages proves to be essential to ensure the coherence of communication despite changing conditions (see *ibid.*).

In the face of increasing globalisation, the intercultural perspective plays a central role in media training. Managers and spokespeople must be prepared to adapt their communication strategies to cultural differences in order to avoid misunderstandings and enable effective crisis management in an international context (cf. Boin, 'T Hart 2024). Studies show that culture-specific communication approaches can significantly increase trust in organisations and contribute to the long-term cultivation of international relationships (cf. *ibid.*). Practical exercises and case studies that address multicultural scenarios provide a valuable basis for promoting awareness of cultural sensitivities and actively shaping perceptions of global stakeholders.

The integration of new technologies and digital communication channels is another essential component of modern media training. The growing importance of social media and the dissemination of real-time information require that leaders be familiar with digital tools in order to effectively manage communication campaigns and respond quickly to viral content (cf. Cornelissen 2023). Simulated scenarios based on digital media offer participants the opportunity to develop strategies that address the specific challenges of real-time communication (cf. *ibid.*). Technologies such as predictive analytics can help to analyse the behaviour of target groups and proactively adapt communication strategies, further increasing the effectiveness of measures.

Continuously updating and developing the content of media training is crucial to ensure its long-term effectiveness. On the one hand, training content must be based on current technological and media developments. On the other hand, it is essential to learn from past crisis situations and to incorporate these insights into the training modules (cf. Boin, 'T Hart 2024). The systematic integration of feedback from participants helps to ensure that content is tailored to needs and that weak points are identified at an early stage (see *ibid.*). Furthermore, the relevance of the training content is ensured by the continuous integration of best practices and expert knowledge from various industries, which increases the practicality and adaptability of the strategies taught.

In conclusion, it can be said that media training makes a key contribution to preparing for crisis scenarios by teaching targeted communication skills and promoting strategic adaptability.

Effective Internal and External Communication Strategies

In a crisis, effective internal and external communication strategies are of central importance for stabilising internal processes in the company and maintaining external perception and public trust. These strategies differ significantly in their objectives and execution and must be specifically tailored to the respective requirements and target groups.

Internal communication strategies focus on informing employees comprehensively and promptly, as well as promoting a coherent response to the crisis within the organisation. Clear structures and defined processes are essential to ensure that information is passed on efficiently and smoothly. For example, studies show that companies that rely on regular internal updates and transparent information channels can significantly increase the trust of their employees (see Fearn-Banks 2016). In this context, a particular focus is on using transparency to eliminate uncertainties and strengthen the motivation of the workforce. In particular, the inclusion of employees in the crisis management process has proven to be effective in promoting organisational resilience and trust in leadership (see Herbst 1998). Nevertheless, the question arises as to what extent internal communication mechanisms in large global organisations can be implemented uniformly and simultaneously flexibly to overcome the various cultural and logistical challenges.

The digital transformation has significantly changed internal communication strategies. Digital

platforms enable faster and more precise dissemination of information, which is a considerable advantage in crisis situations. However, this development also harbours dangers such as flooding employees with non-prioritised information, which can cause confusion and uncertainty (see Baumgärtner, no year given). In addition, internal media training can help managers to develop their communication skills and to convey targeted messages even under high pressure (see Herbst 1998). However, potential weaknesses, such as a shift in focus to technological tools instead of the quality of the messages, should be critically examined. Simulation exercises that recreate internal crisis scenarios have proven to be a valuable tool for identifying weaknesses in communication processes and addressing them in a targeted manner (see Coombs, Holladay 2010). This highlights the need not only to consider communicative content, but also to systematically analyse organisational structures and their ability to manage crises.

External communication strategies are designed to ensure public trust and support from relevant stakeholders. Clear and transparent communication across various external channels is crucial to minimising rumours and uncertainty (see Baumgärtner, no year given). Studies emphasise that a consistent corporate image, particularly through press statements and social media, can effectively protect the company's image (see Herbst 1998). The use of social media not only enables direct interaction with stakeholders, but also the opportunity to address critical issues or misunderstandings in real time (see Coombs, Holladay 2010). Despite these advantages, the dynamics of social media also pose challenges, particularly due to the rapid spread of potentially negative content. This requires continuous monitoring and trained professionals to respond appropriately and quickly (cf. Rendbef 2022).

In a globalised world, cultural adaptation of external communication strategies is becoming increasingly important. Companies must adapt their messages to local conditions and cultural peculiarities in order to build trust with international stakeholders and ensure long-term relationships (cf. Rendbef 2022). Studies show that a targeted adaptation of external communication measures to regional and cultural specifics can significantly increase the credibility and success of the measures (see Baumgärtner, no year given). However, this cultural flexibility requires intensive preparation and the necessary expertise to take into account the different expectations and norms of the target groups. Media training can play a key role here by preparing managers to integrate cultural subtleties into their communication and to adapt their messages accordingly (cf. Herbst 1998).

A central aspect of external communication strategies is the implementation of standardised processes and guidelines, as defined in crisis playbooks. These enable a coordinated and reactive communication strategy that can be applied to different crisis scenarios (see Baumgärtner, no year given). At the same time, however, the question arises as to what extent such standardised approaches do justice to the necessary flexibility that dynamic crisis situations require. Continuous evaluation and updating of external communication standards could offer a solution here to maintain the balance between standardisation and adaptability.

The key difference between internal and external communication strategies lies in their objectives and target audiences. While internal communication aims to inform employees and build trust within the organisation, external communication focuses on managing reputation and ensuring stakeholder trust (see Herbst 1998). These different requirements demand differentiated yet coherently linked approaches. Since employees are also consumers of external media reports, a mutual dependency arises that underscores the necessity of consistent messages (cf. Fearn-Banks 2016). The challenge is to design both lines of communication in such a way that they convey a unified image of the company despite different target groups and content. This highlights the importance of media training that helps executives to switch between internal and external communication in a situation-specific yet credible way (see Baumgärtner, no year given).

Social media plays a special role in both internal and external communication. It offers the opportunity to disseminate information in real time and to receive feedback from various target groups, making it a central tool in modern crisis communication (cf. Coombs, Holladay 2010). For internal communication, social media can serve as a platform for dialogue and collaboration, especially in situations where traditional channels are overloaded or insufficient (cf. Herbst 1998). Externally, social media enable an immediate approach to stakeholders, but also carry the risk of spreading misinformation. This requires

Careful monitoring and a clear strategy to maintain credibility and strengthen public trust (see Baumgärtner, no year given). At the same time, the dynamics of social media demand a fast and flexible response that also takes cultural sensitivities into account in order to effectively reach different target groups worldwide (see Rendbef 2022).

Another important aspect is the consideration of multicultural perspectives. Global companies, whose workforces and target groups are culturally diverse, must develop communication strategies that enable them to effectively address different cultural contexts both internally and externally (cf. Rendbef 2022). This requires an in-depth analysis of cultural values and communication styles, as well as comprehensive preparation, such as training sessions or targeted simulation exercises. Particularly in crisis situations, sensitivity to cultural differences is essential to avoid misunderstandings and build trust (see Baumgärtner, no year given).

In summary, it can be said that internal and external communication strategies are closely linked in crisis situations and must be coordinated with each other. Their successful implementation requires transparency, adaptability and cultural sensitivity to ensure a consistent and effective approach to all relevant target groups.

CONCLUSION

The aim of this scientific paper was to analyse the importance and effectiveness of media training as a central instrument of modern crisis communication and to show how it can help to successfully manage crisis situations. Based on the research question of how companies can optimally prepare and flexibly implement their communication strategies, a comprehensive study was conducted that examined both theoretical principles and practice-oriented approaches. In the course of the work, this goal was achieved by presenting the complex requirements of crisis communication in detail and developing practical solutions. The analysis showed that well-planned and continuously adapted measures in the form of media training courses make a decisive contribution to strengthening the resilience of organisations and protecting their reputation even in critical situations.

The study showed that crisis communication should be considered an integral part of a comprehensive corporate strategy. It was found that transparent, consistent and culturally appropriate communication methods are a key factor in building and strengthening trust among internal and external stakeholders. The work has demonstrated the relevance of media training that prepares leaders to communicate accurately, empathetically, and authentically in critical situations. Through practical methods such as simulations and role-playing, it has been shown that these training programmes can significantly improve the ability to confidently manage public appearances and media challenges. These results underscore the need to equip executives not only with technological skills, but also with intercultural sensitivity and psychological stability to ensure their ability to act in dynamic crisis scenarios.

In the context of existing research, this work broadens the discussion on the complexity and dynamics of crisis communication and introduces new perspectives, particularly with regard to the integration of digital platforms and multicultural approaches. While earlier studies such as those by Coombs or Boin often focused on traditional communication structures, this work highlights the importance of modern media landscapes and technological innovations. Compared to existing research results, the work emphasises the central role of proactively adapting communication measures to constantly growing demands, which represents a significant further development of the subject area. At the same time, a clear link was established to the topic of intercultural sensitivity and its influence on the success of crisis communication, an aspect that has often been treated only peripherally in previous studies.

However, the work has also revealed specific limitations that can serve as a basis for future research. For example, the study is limited to the analysis of existing literature and case studies, which means that potentially highly practice-oriented findings or primary data are missing. It remains to be seen what the long-term effects of implementing media training in different industries will be and what challenges might arise, particularly in heavily regulated or technology-driven sectors. Methodological limitations such as the possible distortion caused by the selection of specific theories and the focus on Western perspectives suggest that an expansion of the research design is needed to enable broader and more nuanced conclusions.

A key aspect for future research is the empirical evaluation of the long-term effectiveness of media training and its implementation in diverse organisational contexts. Furthermore, studies that compare different industries and cultural backgrounds could provide valuable insights into how to optimise crisis communication. The role of new technologies such as artificial intelligence and their integration into crisis strategies also offers a promising field of research, particularly with regard to the automation and real-time adaptation of communication measures. Practical recommendations for companies should be further developed to strengthen their ability to integrate innovative training concepts into their daily work in the long term.

From a personal point of view, dealing with the topic has highlighted how crucial forward-looking and structured crisis communication can be for the stability and credibility of organisations. The work has not only provided scientifically sound insights, but has also provided practical insights into how companies can react to crises in an increasingly complex and globalised world. The continuous development and adaptation of the instruments discussed here will undoubtedly play an important role in the modern business world. In conclusion, the insights gained in this work make a valuable contribution to the theoretical and practical examination of crisis communication and at the same time show how important flexibility, intercultural sensitivity and technological innovation are in this field of research.

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РОЛЯТА НА МЕДИЙНОТО ОБРАЗОВАНИЕ ЗА ИЗПЪЛНИТЕЛНИ ДИРЕКТОРИ И ПРЕДСТАВИТЕЛИ ПО ВРЕМЕ НА КРИЗА

Резюме: Изследването разглежда значението и ефективността на медийното образование като инструмент за комуникация по време на кризи и тяхната роля в преодоляването на кризисни ситуации. Целта на изследването е да анализира развитието и оптимизацията на гъвкави комуникационни стратегии с цел укрепване на способността на мениджърите и представителите да изглеждат уверени и достоверни в публичното пространство. Тази тема е особено актуална поради променящия се ландшафт на комуникацията и нарастващите изисквания за прозрачност и отзивчивост от страна на компаниите. Методологичната основа на работата включва подробен преглед на литературата и анализ на казуси. Теоретичните модели и практико-ориентирани подходи са критично оценени, с цел да се подчертаят техният потенциал и предизвикателства. Анализът показва, че добре планираните медийни обучения с практически методи, като симулации и ролеви игри, могат да укрепят кризисната устойчивост на организациите. Подчертава се също така важността на интеркултурната чувствителност и интеграцията на цифровите технологии, за да се отговори на динамичните изисквания на съвременните кризисни сценарии. Резултатите показват, че медийните обучения оказват значителен принос за защитата на репутацията на компанията и изграждането на дългосрочно доверие сред вътрешните и външни заинтересовани страни. Разработката предлага ценни практически препоръки за компаниите и поставя основата за бъдещи изследвания относно дългосрочното прилагане на такива обучения и образование в различни организационни контексти.

Ключови думи: медийно образование, кризисни ситуации, изпълнителни директори, комуникационни стратегии

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

CHANGES IN LEADERSHIP COMMUNICATION

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Abstract: *Leadership and communication are inextricably linked. The current transformation of the world of work needs a new way of managing communication, which can adapt to today's agile and remote forms of collaboration and their subsequent demands. New principles of work require an overall reform of management processes. Digitalization is not only a driver of change, it also creates numerous new opportunities for communication. For example, hybrid teams can be supported by modern digital media. Overall, collaboration tools enable a broad cross-divisional exchange, as well as platforms for interdisciplinary collaboration. Leadership itself is challenged by remote leadership. Overall, managers have to deal with new communicative interventions. For this reason, it is generally assumed that the turbulent processes described above will not work without the corresponding competences of managers. The present study examines the changing aspects of leadership communication. The aim of the article is to illuminate perspectives on leadership communication and to focus on corresponding perspectives for action.*

Keywords: *Leadership communication, digitalization, virtual collaboration, remote management, communication skills*

INTRODUCTION

The world of work is currently undergoing a dynamic change. Trends, demographic developments and digitalization are considered to be the drivers for this. It is assumed that company structures are adapting to change (cf. Suling & Wildner 2024, p. 4). Based on this, it can be argued that leadership processes will transform accordingly (cf. Suling & Wildner 2024, p. 5). It is fundamentally true that leadership is only possible through communication. It can also be argued that any form of collaboration is fundamentally dependent on communication (cf. Karczmarzyk 2021, p. 7). Leadership communication is considered an essential tool in implementing innovations and developments, which are the result of change (cf. Weibler 2012, p. 398). With this in mind, we can argue that successful leadership communication depends on employees having sufficient information and guidance available, which in turn requires that managers themselves are well informed (cf. Staffbase GmbH 2024, p. 1). Overall, communication is a major success factor for leadership processes. Managers therefore need sufficient skills to be able to act accordingly (cf. Olfert 2015, p. 281). The new world of work is currently characterized by digital interaction. The dynamics of change-related progress therefore require the use of digital media more than ever. This is due on the one hand to the mobility of work, and on the other hand, to the necessary speed of communication (cf. Bechstein 2024, p. 1). The 'Great Place to Work' study from 2021 shows that above all employees want their managers to have professional expertise, empathy and a willingness to communicate (cf. Great Place to Work 2021, p. 1). The study by Deloitte Consulting Ltd 'Work in Transition' from 2022 shows that working remotely involves some challenges. According to the study, mobile working often results in a decreased sense of belonging in employees (cf. Deloitte Consulting GmbH 2022, p. 5). In this context, it is noted that informal dialogue and interdisciplinary communication are suffering. It is also noted that purely technical solutions or virtual methods cannot replace personal dialogue (cf. Deloitte Consulting GmbH 2022, p. 15). Leichsenring (2023) describes that the modern world of work poses challenges for managers. Drawing on a study by Staufen, Leichsenring (2023) shows that more than 70% of respondents rate communication skills as the most important leadership competence. More than 40% of respondents stated that managers need development in this area in particular (cf. Leichsenring 2023, p. 1). The 'Business and Law School' (2021) focuses on recommendations for action for managers in a new world of work.

The communication dimension in particular proves to be essential. Transparent communication and equal access to information for all stakeholders also appear to be of great importance. These serve as the basis for successful cooperation. Similarly, personal and supportive dialogue should be initiated and maintained by managers at all times (cf. BSP 2021, p. 17).

The aim of this academic article is to highlight aspects of the changes in leadership communication in relation to the change in the world of work. It is intended to shed light on current perspectives and possible courses for action. Overall, this article is intended to provide recommendations, as well as impetus for further scientific discourses.

METHODOLOGY

This scientific article refers to current aspects of leadership communication. It focuses on the following research question: How is successful leadership communication modified in the currently changing world of work? A systematic literature review is conducted to answer this question. To this end, the literature on the topic of 'Leadership communication in the current changing world of work' will be researched and then evaluated, compared and critically interpreted. The focus here is on the examination of existing findings and a reflected contextualisation in order to answer the present research question.

RESULTS

Leadership communication

Leadership communication is the instrument used to convey not only content and relevant guidelines through communication, but also concrete information, requirements and policies. It can be assumed that success depends on whether leadership communication works (cf. Weibler 2012, p. 398). Scholz (2022) argues that managers have the ability to use various communicative leadership tools (cf. Scholz 2022, p. 80). It is important to note that leadership communication plays a central role in the work process (cf. Scholz 2022, p. 81). Karczmarzyk (2021) makes it clear that leadership can be interpreted in many ways and is therefore difficult to define explicitly. What is obvious, however, is that it is initiated by people who have command of the communicative tools necessary for a successful leadership process (cf. Karczmarzyk 2021, p. 11). According to Stehle et al. (2018) there is significantly more communication in employee-oriented leadership than in task-oriented leadership. Employee-orientation seems to be more appropriate when it comes to change in particular (cf. Stehle et al. 2018, p. 20). On the one hand, leadership communication in the event of change depends on the dynamics of the change processes; on the other hand, it can influence the subjective attitude of the management in times of change. As a whole, change-related leadership communication seems to benefit from dialogue-oriented communication (cf. Marso-Walbeck 2018, p. 61).

In her remarks Müller (2020) refers to the "[...] *Study of the Institute for Leadership Culture in the Digital Age* [...]" (Müller 2020, p. 1) from 2019. The results show that leadership communication, shortly followed by adaptability are the most important competencies of leaders. According to Müller, transparency in communication is another requirement. Clarity of expression also plays a central role in communicative interaction, since otherwise there is a risk of misunderstandings (cf. Müller 2020, p. 1).

Leadership is impossible without personal communication (cf. Laufer 2021, p. 8). In times of change, intensive communication is particularly important. Those affected or involved in change processes should be fully involved by way of transparent communication (cf. Laufer 2021, p. 27). Essentially, changes must be explained by managers in terms of purpose and goals. It is also advisable to provide information not only about advantages, but also about any disadvantages. A dialogue in this regard should take place for as long as it is needed (cf. Laufer 2021, p. 28).

Digital developments are constantly driving change, so that leadership reaches the limits of its information processing. Employees are dependent on an efficient internal communication flow. Based on this, management communication should be multidimensional to promote agility. Digital communication can maintain agility. However, there is also a certain risk of creating misunderstandings in the process (cf. Laufer 2021, p.7).

In the new world of work, work increasingly takes place remotely, which poses a particular challenge for management communication. Mühsig (2024) notes that management communication only works if

managers “[...] *are themselves in the flow of communication [...]*” (Mühsig 2024, p. 1). In this context, managers are seen as the “[...] *most important multipliers [...]*” (Mühsig 2024, p. 1) for implementing corporate communication. Nevertheless, not only an uninterrupted information chain seems to be crucial, but also the corresponding competences of managers.

The basic principle is that leadership is successful only when communication has achieved an understanding of goals. Essentially, three fundamental aspects are identified for successful leadership communication. Firstly, as already pointed out in the previous sections, it is necessary to take a look at the managers themselves. Secondly, an appropriate communication strategy focussing on the necessary impact is recommended. Thirdly, it seems important that leadership communication uses the right channels and media (cf. Mühsig 2024, p. 1).

Digital communication in leadership

Digital communication is understood as the communication between at least two people using different technical means of communication (cf. Olfert 2015, p. 284). Ciesielski and Schutz (2016) assume that digital communication can only take place to a limited extent, as communication fundamentally also creates room for interpretation. Personal communication, on the other hand, supports clarity through facial expressions and gestures. By comparison, the possibility of recording is limited in personal communication. In contrast, in digital communication, technical storage options and the associated repetitions are available (cf. Ciesielski & Schutz 2016, p. 19).

The rapid development of digital communication is creating wider connection options. The key factors in digital communication are stable connection, uninterrupted transmission quality and appropriate data protection. The advantages lie in the speed, reliability and quality of information transmission. The quantity of available information and its quality are seen as challenges. Digital leadership is understood as a virtual process in which employees, who work in various forms on a mobile and virtual basis, are instructed or guided by managers using the available digital communication media. In this context, the New Work trend is particularly evident in terms of new and flexible working models (cf. Forum Verlag Herkert 2024, p. 1). In virtual leadership, managers are sometimes restricted in their scope of action. Therefore, it is advisable that management should take place largely by way of target agreements and that virtual teams are given more responsibility. The so-called “*virtual distance*” (Blaszczyk 2019, p. 52), which is based on the key factors of relationships, interaction and networking, is considered a threat to virtual teams. Should the above factors be missing, or only present to a limited extent, this would result in “*virtual distance*” (Blaszczyk 2019, p. 52). Blaszczyk (2019) assumes that the promotion of these factors is crucial for team success (cf. Blaszczyk 2019, p. 52). Thus, it makes sense for leaders to initiate, promote and implement communication, relationships and activities (cf. Blaszczyk, 2019, p. 53). Collaboration in teams is subject to individual communication and interaction requirements. In this context, teamwork offers the opportunity to combine different potentials in order to achieve room for maneuver and the autonomy that results from it (cf. Mütze-Niewöhner et al. 2021, p. 2). However, when teams work together virtually, challenges and burdens are placed before or at least alongside potential opportunities (cf. Mütze-Niewöhner et al. 2021, p. 3). Managers are called upon here to support assignments for teams through appropriate attitudes and conditions (cf. Mütze-Niewöhner et al. 2021, p. 4).

Perspectives on management communication

The current transformation of the world of work clearly shows new forms of cooperation as well as related trends in communication. Both are largely due to the ongoing progress of digitalisation. Virtual leadership is therefore faced with changing conditions and principles. Managers are required to adapt to this (cf. Pohlabein et al. 2020, p. 53). The principles are “[...] *more collaboration and transparency as the basis for more personal responsibility and autonomous working [...]*” (Pohlabein et al. 2020, p. 53). Digitalization and the related technical conditions create opportunities to manage the multitude of information resulting from change. The methods and tools that are available appear to be important. It can be expected that similarly adapted forms of communication will also be required (cf. Pohlabein et al. 2020, p. 63). All in all, managers need a range of new skills to lead employees through change. The new forms of

collaboration resulting from the change can be seen to create greater room for maneuver. Self-organization and self-management are becoming the focus of work activities. Digitalisation and the associated technical conditions create opportunities to deal with the multitude of information resulting from change. The methods and tools that are available appear to be important. It can be expected that correspondingly adapted forms of communication will also be required (cf. Pohlabein et al. 2020, p. 63).

All of the factors listed above depend on a form of communication that is necessary in the modern world of work (cf. Kauffeld & Albrecht 2021, p. 4). Seibold and Mugler (2022) argue that a new work organisation brings with it various new methods. that a new labor organization will bring with it several new methods. In particular, they point out that the modern world of work makes use of digital communication and collaboration tools (cf. Seibold & Mugler 2022, p. 5). Collaboration is understood as working together in the common interest. Here, employees from different areas of work collaborate, despite having conflicting interests (cf. DWDS 2024, p. 1). Seibold and Mugler cite Office 365 as an example of a digital communication and collaboration tool (cf. Seibold & Mugler 2022, p. 5). A collaboration tool is software that makes it possible for several parties to act simultaneously. The purpose behind this is to enable transparent and efficient collaboration (cf. Sturm 2024, p. 1). The use of such tools safeguards data protection, behavior, communication and organization. However, internet connection problems or irregularly frequent updates, could hinder the efficient operation of such tools (cf. Seibold & Mugler 2022, p. 32). Technical developments control the way in which leadership takes place. According to Suling and Wildner (2024), large amounts of data, comprehensive platforms and the use of artificial intelligence also influence the management process. One of the challenges posed by these aspects is that managers could lose control and overview (cf. Suling & Wildner 2024, p. 5).

The growth in remote work situations leads to increased virtual leadership. In the circumstance of hybrid working conditions, leadership is faced with certain challenges. Hybrid collaboration is when employees work together both on site and from home at the same time (cf. Breyer-Mayländer & Zerres 2022, p. 2). Studies show that the process of management communication is particularly important here (cf. Breyer-Mayländer & Zerres 2022, p. 3). In hybrid collaboration, it is assumed that there is a lack of information between present and virtual employees. It is also assumed that virtual employees are less committed to the company and that there is less trust in the management relationship. Asynchronous management communication seems possible in principle, but it is assumed that it lacks in quality (cf. Breyer-Mayländer & Zerres 2022, p. 4). Overall, it can be concluded that managers need appropriate professional skills when implementing virtual communication tools (cf. Breyer-Mayländer & Zerres 2022, p. 5).

CONCLUSION

The results of the current study indicate an evolution in the forms in management communication. It is clear that management communication is not only undergoing a transformation as a result of the changing world of work but is also becoming of central importance. It can be assumed that how we work together will change significantly. As a result, communication should be designed accordingly and should be agile enough to adapt to the necessary speed of change. Due to the mobility of work, remote leadership presents a challenge to managers. Specifically, it can be argued that communication in mobile and hybrid collaboration requires integral support. In this regard, regular dialogue and feedback could be an effective tool for successful leadership communication. It is recommended that communication achieve a higher level of understanding, particularly through changes in personal dialogue. The above feedback could help managers take a new course of action. It is commonly believed that sufficient and transparent information has always been a priority for employees. The use of different digital media in communication seems unavoidable. New forms of work therefore require new virtual instruments for collaboration. Digital communication and collaboration tools are seen as a necessary innovation. On the one hand, agile communication is considered an advantage. On the other hand, digital cooperation could give rise to criticism. It is recommended that employees participate in the use of such tools. Communication with a remote-working staff requires needs- and demand-orientated virtual tools. Overall, change-related management communication seems to benefit from dialogue-oriented communication.

The current world of work requires communicative leaders with strong knowledge in the application

of various digital communication tools. Communicative competence is fundamentally required, as well as knowledge of demand-oriented digital tools as well. Management communicative competence could be assessed as a prerequisite in accordance with the necessary adaptation and transformation abilities.

The following recommendations for action can be derived from this: Companies should pursue a communication strategy in the new changing world of work. It is important that all stakeholders are involved in a communicatively transparent manner. Overall, management contact should take place via appropriate means of communication. According to the overall context, interaction requires security and data protection, especially with regard to digital communication, as well as network and line stability. In the case of virtual teams, management processes based on goal-oriented agreements are recommended. Managers are the key to success. To do this, they need opportunities to adapt and expand their communicative skills. There is some evidence that leaders themselves need to expand and adapt their competencies.

To sum up, the needs of employees are worth further analysis. Involving employees in the integration of new communication processes through participation and co-design can be beneficial from several perspectives. As a suggestion for further in-depth research on leadership communication, it is recommended to analyze the dimension of digitalization in more detail, in particular the aspects of artificial intelligence.

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ПРОМЕНИ В УПРАВЛЕНСКАТА КОМУНИКАЦИЯ

Резюме: Лидерството и комуникацията са неразривно свързани. Настоящата трансформация на света на труда се нуждае от нов начин на комуникация на ръководството, който може да се адаптира към днешните гъвкави и отдалечени форми на сътрудничество и произтичащите от тях изисквания. Новите принципи на работа изискват цялостна реформа на управленските процеси. Цифровизацията е не само двигател на промените, но и създава множество нови възможности за комуникация. Например хибридните екипи могат да бъдат подпомагани от съвременните цифрови медии. Като цяло инструментите за сътрудничество позволяват широк междуетраслов обмен, както и платформи за интердисциплинарно сътрудничество. Самото ръководство е изправено пред предизвикателството на дистанционното ръководство. Като цяло мениджърите трябва да се справят с нови комуникационни интервенции. Поради тази причина обикновено се приема, че описаните бурни процеси няма да проработят без съответните компетенции на мениджърите. Настоящото изследване разглежда променящите се аспекти на управленската комуникация. Целта на статията е да се осветлят перспективите за лидерската комуникация и да се акцентира върху съответните перспективи за действие.

Ключови думи: лидерска комуникация, дигитализация, виртуално сътрудничество, дистанционно управление, комуникационни умения

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

**VALIDITY OF SELF-ASSESSMENTS AS AN AUDIT TOOL:
A COGNITIVE AND PSYCHOLOGICAL PERSPECTIVE**

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Abstract: *This paper discusses the validity of self-assessments as audit tools in data protection and information security contexts from cognitive and psychological perspectives. By conducting a comprehensive literature analysis, this research synthesizes findings from several academic fields to investigate how cognitive and psychological biases influence the validity of self-assessments. Thus, this paper separates the self-assessment process into four subtasks: comprehension, retrieval, judgment, and response, each of which is vulnerable to specific biases. Key findings show various factors that threaten the validity of self-assessments: problems in comprehension due to the complexity of the languages used, memory biases in information retrieval, and judgment errors such as satisficing and acquiescence, among response order effects. The study finds that these biases could give incorrect results even when respondents mean to answer honestly. By implication, this research contributes to the scientific basis for reformation and improvements in the design of self-assessment tools because the psychological factors discussed form strong bases that should be brought into consideration to enhance validity of self-assessments.*

Keywords: *Audit tool, cognitive and psychological biases, data protection, information security, self-assessments*

INTRODUCTION

In the professional context of data protection and information security, organisations frequently utilise self-assessments to audit taken measures. Self-assessment results often influence decisions regarding collaboration with third parties and regarding compliance with regulations. Findings from related academic disciplines cast doubt on the efficiency of this approach and the utility of self-assessments.

The use of self-assessments regularly involves people, who in turn are affected by cognitive and psychological processes (cf. Haraldsen 2013, p. 110). Answering a self-assessment can, as shown in Fig. 1, be divided into four subtasks: comprehension, retrieval, judgement and response (Tourangeau 1984, pp. 74–93). The dashed boxes in Figure 1 represent relevant biases, some of them will be examined further below.

In “comprehension”, an understanding of the question that is as similar as possible to the respondents one should be established. “Retrieval”, means that the respondent must access the information required to answer. Within “judgment”, this retrieved information is evaluated. The actual act of providing the answer occurs during “response”. Cognitive and psychological biases can influence each of these subtasks. Therefore, following a methodological outline, an excerpt-based discussion of such biases will be presented.

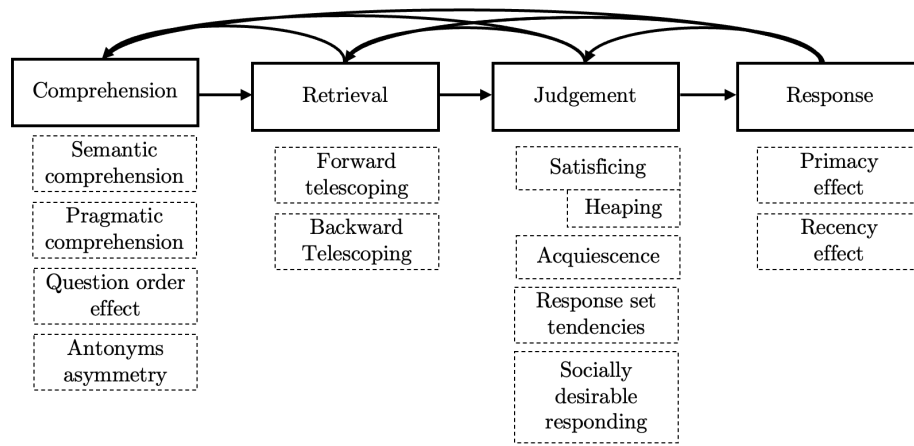


Fig. 1. Subtasks of the respondent when answering a question and chosen biases (extended figure by the author; based on Tourangeau 1984, pp. 74–93)

RESEARCH METHODOLOGY

In various disciplines, differing levels of well-substantiated findings exist regarding potential sources of error. A comprehensive literature analysis synthesises current research with a focus on its relevance to professional contexts, particularly concerning data protection and information security. The literature review includes, among other sources, published books, research papers, journals, and online articles from a range of academic fields.

RESULTS

In the **subtask of comprehension**, it is crucial that the respondent understands the question as intended by the questioner. Therefore, the language and specialised terms used are particularly significant. If respondents find a question difficult to answer they are likely to modify it in a way that makes it easier to respond, which can reduce validity (Schwarz 1990, p. 9). Even in cases where the questions seem flawless and unambiguous, biases can emerge, exemplified by effects of question order. A context-example: When asked “What is your security concept?”, it is likely that physical security will be described as a subset of security. However, the scenario often differs when a question about physical security is asked first, followed by the mentioned question identically. In this sequence, respondents will typically address physical security first, and their knowledge of this question may then be interpreted as implying that physical concerns should be excluded from the subsequent question. Thus, with the same questions but in a different order, and hence different comprehension, different answers will be elicited. This example also illustrates that the less precise the question, the more interpretation is required, and the question itself is used for interpretation (Schnell 2019, p. 24).

Regarding the effect of question order, there are two orientations: consistency effects, where the first question or answer increases the similarity of the second answer, and contrast effects, where the second question differs greatly from the first (Schuman and Presser 1981, pp. 27–28). The direction of the context effect is determined by the categorisation of the available information. Information included in the cognitive representation of the judgment object results in assimilation effects, while excluded information results in contrast effects (Schwarz 1991, p. 7).

The tone of a question – whether framed negatively or positively – also matters, as this influences the answers given. According to Schuman and Presser (1981, 296), this is the largest wording effect, explained as antonym asymmetry. A context-specific example could be either “Is the use of out-of-date software not allowed?” or “Is the use of out-of-date software forbidden?”. A lower consent rate is expected for the second question (cf. Rugg 1941, pp. 91–92). Strack (1994, p. 29) states that respondents are more likely to answer “no” when the verb “allow” is used, compared to “yes” when the wording contains “forbidden”. Conversely, the proportion of “no” responses for “forbid” is higher than the proportion of “yes” responses for “allow”. The reason for this asymmetry can be attributed as follows: “forbidden” comes across as harsher and more definitive, and therefore a question containing this term is less likely to receive agreement. Finally, the

asymmetry effect depends heavily on the abstractness of the phrasing used (Schuman and Presser 1981, p. 280).

Further attention should be drawn to assimilation effects. This describes the relationship between the context of the self-assessment and the responses. In a positive context, responses are expected to be more positive, whereas in a negative context, they are expected to be more negative. A related effect is caused by existing contextual information. Studies have shown that identical questions are answered differently depending on the survey title (Galesic and Tourangeau 2007, p. 199). This knowledge can, in the context of this paper, be transferred to the department that sends out the self-assessment. Accordingly, it can be assumed that answers will differ if the legal or the sales department requests the responses.

The **subtask of retrieval** focuses on accessibility of information. Especially in larger organisations, relevant details are stored in systems, and cognitive and psychological insights regarding autobiographical memory are only partially applicable (Haraldsen 2013, p. 83). For data protection or information security reasons, it is often necessary to inquire about past events such as incidents. In doing so, it is important to take into account the more commonly observed forward telescoping effect, as well as the less frequent backward telescoping effect, both of which are psychological dating errors (Schnell 2019, p. 32) and presented in Fig. 2.

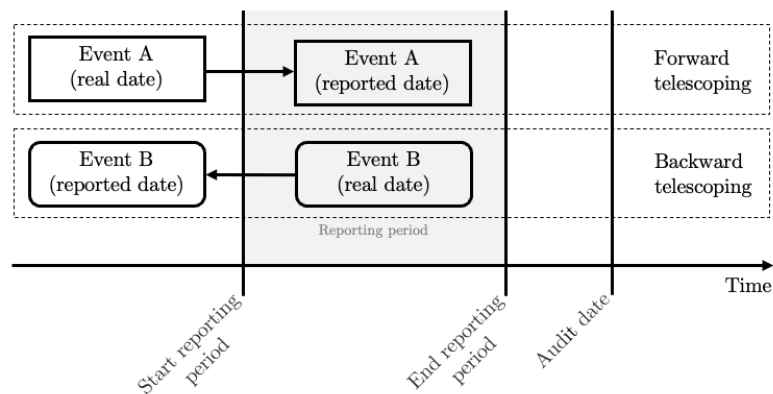


Fig. 2. Overview of the dating errors forward telescoping and backward telescoping (figure by the author, based on Schnell 2019, pp. 31–32)

In forward telescoping, the relevant event that is to be reported actually occurred before and thus outside the reporting period. However, due to psychological effects during recall, it is reported as having occurred within. This results in an increased prevalence rate, meaning the number of relevant incidents is overestimated (Schnell 2019, pp. 31–32). Similarly, in backward telescoping, an event that actually occurred within the reporting period is “thought of” as occurring before the reporting period due to psychological factors and the prevalence rate is underestimated (Schnell 2019, pp. 31–32).

It is also important to highlight the bias memory creation. Here, the focus is not on the correct temporal placement but on the construction of memories, even though the underlying event may never have taken place. This occurs when respondents link their memories to new and false recollections (Loftus 2000, p. 201). Particularly susceptible to this are memories that are already fading due to the passage of time and the construction of false memories can be based on two key mechanisms: suggestion by others and one’s own imagination (Loftus 2000, p. 202, 209).

The results of a study by Thompson, Skowronski and Lee (1988, p. 243) are also noteworthy: the test subjects stated that 22% of their attempts to recall autobiographical events were pure guesswork. This finding is comparable with the results of Menon (1993), who found an error range from 13% for the most accurately reported behaviours to 130% for less accurately reported behaviours.

Current research suggests that the level of detail in the questions also plays a significant role in this context. The results of Schwarz and Sudman (1987) suggest that the more detailed the questions, the more comprehensive the responses, and the more frequently reported events.

Having information available from the second subtask does not directly lead to an answer but is instead processed by the respondent during the **subtask judgment**. Respondents are influenced by the potential consequences of their answers, and effects such as satisficing and acquiescence come into play (Krosnick 1991, p. 213, 217).

In satisficing, the respondent does not necessarily provide the correct answer but tends to a response that most satisfies the requester (Barge and Gehlbach 2012, pp. 2, 17–27). The strength of this bias depends on task complexity, respondent motivation, and cognitive abilities. In the specific context considered in this study, heaping, also known as digit preference, is a phenomenon to note as a particular form of satisficing. This phenomenon indicates that when querying frequencies, numbers, and probabilities, certain digits or endings are preferentially reported or avoided (Schnell 2019, p. 39). This is explained by effort minimisation, which leads to the use of response heuristics. In addition to satisficing, acquiescence also influences the use of self-assessments. This tendency refers to respondents being more likely to give affirmative answers rather than negative ones, regardless of the actual content of the response. Rokeach (1963, pp. 304–309) demonstrated that respondents would even agree to two items with contradictory content if these were formulated as agreeing question-and-answer pairs. The likelihood of agreement increases with the length of the question (Trott and Jackson 1967, p. 279) and with inconsistently formulated questions (McBride and Moran 1967, pp. 116–117).

If the respondent's knowledge is lacking, answers will become increasingly random, especially an answer is mandatory (cf. Converse 1970). However, due to the previously mentioned acquiescence, absence of knowledge does not lead to perfectly distributed answers, such as 50% “Yes” and 50% “No” responses, but rather to more affirmative than negative responses. A study by Schuman and Presser (1981, pp. 148–154) shows that, with 61.9%, a majority of respondents support an unknown law if they generally hold a positive contextual opinion. If this is not the case, the majority will reject the unknown law.

In addition to satisficing and acquiescence, the tendency towards the middle can also be explained by the respondent's effort minimisation (Bogner and Landrock 2015, p. 2), where middle scale values are more frequently chosen as answers, regardless of the actual content or correct response, in an effort to avoid extremes.

In the context of this paper, particularly noteworthy is the effect of socially desirable responding, defined as the tendency to provide positive self-descriptions (Paulhus 2002, p. 49). This effect is highly relevant in the context of audits and must be taken into account. It can be assumed that respondents will particularly emphasise the desired information in order to build and maintain business relationships and present their organisation in the best possible light (cf. Bishop, Tuchfarber and Oldendick 1986, p. 248).

In the **subtask response**, effects related to the order of answers become apparent. The sequence of responses influences the validity of self-assessments, a phenomenon referred to as response order effects. In written self-assessments, the primacy effect is particularly evident. This leads respondents to select one of the initial response options (Schwarz et al. 1985, p. 187). Krosnick and Alwin (1987, pp. 202–203) explain this through two factors: firstly, the initial response options create a frame of reference that affects the interpretation of subsequent items; secondly, the initial response options are processed more deeply than later ones, thus overshadowing the later options in memory and consciousness. The recency effect occurs when one of the final response options heard or seen is disproportionately chosen (Bogner and Landrock 2015, p. 8). This phenomenon is explained in the literature by the differing inputs into short-term and long-term memory and their retrievability, depending on elapsed time (cf. Schwarz et al. 1985, p. 188).

CONCLUSION

The presented selection of cognitive and psychological biases clearly illustrates that, from a psychological perspective, there are numerous sources of error in the use of self-assessment as an audit tool, which can significantly undermine the validity of the results. While it is a necessary condition that the respondent intends to answer honestly, this alone is not sufficient. The employed self-assessments must take these findings into account in order to minimise the biases, to the extent possible. This paper provides an introduction to research on how these various factors influence the validity of self-assessments as an audit tool and the potential interrelations involved. On this basis, design guides for self-assessments can further be developed.

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ВАЛИДНОСТ НА САМООЦЕНКИТЕ КАТО ИНСТРУМЕНТ ЗА ИЗСЛЕДВАНЕ: КОГНИТИВНА И ПСИХОЛОГИЧЕСКА ПЕРСПЕКТИВА

Резюме: Тази статия оценява валидността на самооценките като инструменти за одит в контекста на защита на данните и информационната сигурност от когнитивна и психологическа перспектива. Чрез цялостен анализ на литературата изследването синтезира открития от различни академични области, за да разгледа как когнитивните и психологическите пристрастия влияят върху надеждността на самооценките. Затова това изследване разделя процеса на самооценка на четири подзадачи: разбиране, извличане, преценка и отговор, всяка от които е

податлива на специфични пристрастия. Основните открития разкриват множество когнитивни и психологически фактори, които могат значително да подкопаят валидността на самооценките. Те включват проблеми с разбирането поради сложността на езика, пристрастия в паметта при извличане на информация, грешки в преценката като задоволяване и съгласие и ефекти от реда на отговорите. Изследването подчертава как тези пристрастия могат да доведат до неточни или изкривени резултати, дори когато респондентите имат намерение да отговорят честно. Това изследване допринася към научната основа за подобряване на дизайна на инструментите за самооценка, като подчертава необходимостта от отчитане на тези психологически фактори за повишаване на надеждността и ефективността на одитите в контекста на защита на данните и информационната сигурност.

Ключови думи: инструмент за одит, когнитивни и психологически предубеждения, защита на данните, информационна сигурност, самооценки

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

AGILITY: SAVIOR OR INFLATIONARY USE?

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Abstract: *In a business context, the term “agility” became known primarily through a working methodology in the field of software development. In 2001, software developers developed the “Agile Manifesto of Software Development”. In it, they describe four values and 12 basic principles for collaboration in agile software development based on Talcott Parsons’ AGIL scheme from the 1950s (adaptation, goal attainment, integration, latency). In the last 20 years, software development has achieved a central position in our economy. As a result of this popularity, the term “agile” has also established itself as an elementary term in the management of projects, departments or entire companies beyond the software development environment. Many of the values and principles of the agile manifesto are now applied to projects or processes in other industries and the term “agile” is used in many different situations. However, the question arises as to what extent the now overused terminology can still be measured against the basic principles and values of the actual purpose and whether the people working in “agile processes” still perceive the terminology as such?*

Keywords: *agile, Software Development, agile management, agile transformation*

INTRODUCTION

The widely used term “agility” is a very popular and frequently used term in a business context, which owes its popularity to the upswing in software development over the last 20 years. Whether agile project management or agile leadership, agility now promises short to long-term success for projects, teams or individual employees in all areas of a company. According to a study by the University of St. Gallen, in which managers from various industries were asked about their assessment of perceived agility in their company. When asked whether there had been an increase in agility in their company, 40% responded with “Agree” and as many as 15% with “Strongly agree”. 30% were neutral, while the remaining 15% disagreed (Lindner 2020). But where does the term “agile” actually come from and how was it originally used? What methods are behind the term and to which organizations or structures can agile working methods be applied? Is “agile” the solution to all organizational problems or is the term used in an inflationary way nowadays and is therefore only perceived by employees as an empty term and no longer used for its intended purpose?

RESEARCH METHODOLOGY

The study is based on a literature review and examines the origins and current use of agility. It explicitly addresses the issue of the inflationary use of the term and develops the basics for the effective use of the agile method. The discussion is intended to help companies, teams, managers and employees in the selection of agile methods, in their correct use and to create a better understanding of the term “agility”.

RESULTS

Origin of agility

The term “agile” or “agility” originally comes from the Latin and means something like being highly mobile or maneuverable. In the business environment, the term is associated with fast, flexible, step-by-step or not afraid of making mistakes. Due to the upswing in software development, the term has received increasing attention in the last 20 years. The agile way of working was first coined by Talcott Parsons in the 1950s. He defined agile with four skills: Adaptation for adaptability, Goal attainment for the ability not to lose sight of the goal, Integration for the ability to keep agile elements of an organization together and Latency for maintaining the agile concept. On this basis, seventeen software experts developed the “agile manifesto” in 2001. The document for agile working methods, which is still regarded as the basis today, comprises four values and twelve principles (Fischer 2016).

The values

1. individuals and interactions more than processes and tools
2. functioning software more than comprehensive documentation
3. collaboration with the customer more than contract negotiation
4. reacting to change more than following a plan (The Agile Manifesto 2001)

The principles

- a) Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
- b) Welcome requirement changes even late in development. Agile processes use change to the customer's competitive advantage.
- c) Deliver working software regularly within a few weeks or months, preferring the shorter timescale.
- d) Subject matter experts and developers must collaborate daily during the project.
- e) Build projects around motivated individuals. Give them the environment and support they need and trust them to get the job done.
- f) The most efficient and effective way to communicate information to and within a development team is face-to-face.
- g) Working software is the most important measure of progress.
- h) Agile processes promote sustainable development. Clients, developers and users should be able to maintain a steady pace indefinitely.
- i) Constant attention to technical excellence and good design promotes agility.
- j) Simplicity -- the art of maximizing the amount of work not done -- is essential.
- k) The best architectures, requirements and designs are created by self-organized teams.
- l) At regular intervals, the team reflects on how it can become more effective and adapts its behavior accordingly (The Agile Manifesto 2001).

Agility today

In the meantime, agile methods and agile management have established themselves far beyond the IT sector in the corporate context. According to a study by the Agile Business & IT Collaboration Model 2019, nine out of ten companies from various industries say that they use agile methods in certain areas or teams (IDG Business Media 2019). Agile leadership, agile management or the use of agile methods. The term "agile" is now used in front of many important business terms and the fundamental question arises as to whether the term is now also being used as an inflationary buzzword without actually being realized.

Agile methods

The principle of every agile method is based on the agile manifesto and aims to make teams more flexible and collaborative. Changes or errors should be incorporated or rectified as quickly as possible through short coordination cycles. The best-known agile methods are listed below.

Scrum

Scrum is an agile method in which development teams develop software in so-called sprints in two to four-week cycles. A scrum team consists of around ten members. Short daily coordination meetings ensure maximum transparency within the team and are intended to immediately uncover any errors in the process or development. It is hoped that the short cycles and close coordination will result in a high degree of flexibility and maximum effectiveness (Layton, Morrow 2023, pp. 52–55).

Kanban

Kanban is an agile method that uses a visual approach to process optimization. On a so-called Kanban board (can be analog or digital), task cards are assigned to different columns such as "to do", "in progress" or "done" depending on their current status. Responsibilities are clearly assigned and the focus on the respective lead time of a task from start to completion helps with the continuous improvement process (Anderson 2011, pp. 14–15).

Extreme Programming (XP)

Extreme Programming (XP) is an agile development method that is based on trust and verbal communication and is intended to be highly flexible with very short development cycles with automated tests running in parallel and, by handing over responsibility to each individual employee, should also manage without a real manager (Beck 2003, pp. 16–17).

DevOps

DevOps attempts to combine software development and IT operations. The aim is to deliver higher quality through strong collaboration. In addition, a high degree of automation right from the start should ensure high efficiency. Fast feedback loops and short-term updates ensure a high level of flexibility (Safar 2022).

Design thinking

Design thinking is a methodical approach with the aim of developing user-oriented solutions for complex problems. The problem goes through the 6 phases of design thinking: understanding, observing, defining the problem, brainstorming, developing a prototype and testing. This is intended to promote a high level of creativity and create a strong customer focus (Ehmann 2019, pp. 21–31).

The advantages of agility

The values and principles of the agile manifesto are at the forefront of all agile methods and the advantages of agility can be determined from this. The greatest added value is the high level of flexibility combined with the ability to adapt to short-term changes in requirements or market conditions. The second advantage is the high level of customer orientation, which ensures that customer feedback can be immediately incorporated into the development process. Another advantage is the high level of transparency and communication. This creates a high sense of responsibility both in management and in dealings with each other, and thus also a clear distribution of tasks within the team. The short cycles, such as sprints, also increase productivity. In addition, problems are identified at an early stage and risks of major damage are minimized (Bright Solutions 2024).

Agile – Inflationary use

Unfortunately, the word agile is increasingly being used in an inflationary way in a business context and the meaning of employees is often simply ignored as an empty phrase. Agile leadership, agile development, agile teams or agile working. Managers or companies in particular often use the term in front of various structures or work processes in order to appear more professional or modern. However, if you look behind the scenes and take a look at teams, processes or structures, you quickly realize that the values or principles of agility are often not lived and therefore no real improvement effect is created. As a result, there is a risk that the real benefits that agile methods can bring are no longer recognized by employees or companies, or that the concept itself is not taken seriously (Inselmann 2021). The reasons for the inflationary use of agility are complex, but can be found above all in the attempt by managers and consultants to impose agility on employees or processes (Würzburger 2019).

Basics for correct use

In order to really live agility in a meaningful way and not just overuse the term, decisive factors must be present in a company or a project. First of all, the corporate/project culture must be an open, learning-oriented culture in order to provide a breeding ground for agility. In addition, managers should have the right mindset so that the role of the agile manager can also be properly understood and practiced as a facilitator and supporter. Clear structures must also be created that reflect the company's long-term strategy or the goal of the project (Gerweck 2022). It is also important that everyone involved is clear that agility is not a short-term project savior or a method used for short-term improvement. The use of agility means a long-term commitment that must be accepted by everyone involved. Without creating the right conditions, there is a risk that agility will remain just an empty phrase and employees will turn away from it.

CONCLUSIONS

In summary, it can be said that the basis of the agile way of working originates from the software development environment. Many of the values and principles can be easily adapted to other areas of business and life. However, it is very important that the underlying values and principles are actually observed and practiced when using the term “agile”. If the term is used in an inflationary way, there is a risk that the term loses its value and no longer has any meaning for employees or teams. This makes it all the more important to take a critical look at processes, teams or company structures that advertise agility, both from the outside and from the inside, and to constantly question the underlying values and principles. In addition, decision-makers should always consider the overall structure before introducing an agile process. Can agility be implemented in the long term? Does it make sense to implement the activity in agile mode? How can interfaces that do not work in an agile mode be satisfied? Do managers have the right mindset for an agile structure? Looking to the future, it should be noted that the agile working world brings with it all the important components of the modern view of collaboration, leadership and management methods, but runs the risk of losing its effectiveness through inflationary use.

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ГЪВКАВОСТ: СПАСИТЕЛ ИЛИ ИЗТЪРКАНА УПОТРЕБА?

Резюме: В бизнес контекст терминът „гъвкавост“ стана известен най-вече чрез работеща методология в областта на разработването на софтуер. През 2001 г. разработчиците на софтуер разработиха Манифест за гъвкава разработка на софтуер. В него те описват четири ценности и 12 основни принципа за сътрудничество при гъвкаво разработване на софтуер въз основа на схемата AGIL на Талкот Парсънс от 50-те години на миналия век (адаптация, постигане на целта, интеграция, латентност). През последните 20 години разработването на софтуер зае централно място в нашата икономика. В резултат на тази популярност терминът „гъвкав“ се утвърди и като елементарен термин в управлението на проекти, отдели или цели компании извън средата за разработване на софтуер. Много от ценностите и принципите на Манифеста за гъвкавост

вече се прилагат към проекти или процеси в други индустрии и терминът „гъвкав“ се използва в много различни ситуации. Възниква обаче въпросът до каква степен използваната вече прекомерно терминология все още може да се съпостави с основните принципи и ценности на действителната цел и дали хората, работещи в „гъвкави процеси“, все още възприемат терминологията като такава?

Ключови думи: Agile, разработка на софтуер, гъвкаво управление, гъвкава трансформация

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
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**MEASUREMENT ERRORS IN QUESTIONNAIRES:
AN ANALYSIS OF QUESTION FORMAT-SPECIFIC ERRORS**

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Abstract: *This paper examines the measurement errors in questionnaires, focusing on question format-specific errors that can affect validity. Through a comprehensive literature review, 13 types of errors have been identified, focusing in particular on multiple-choice and free-answer questions. The results shows that multiple-choice questions, among others, are subject to “test wiseness” and “irrelevant difficulty”, while free-answer questions result in a higher rate of non-response. It covers different types of errors, including dead-end questions, double-barrelled questions and loaded questions. The investigation also looks into the strategic use of certain question types to elicit more valid responses. This research shows how question-related errors affect questionnaire trustworthiness. It provides a basis for improving questionnaire design, valuable especially for non-expert practitioners. This paper aims to enhance the validity and reliability of information gathered via this widely used tool by highlighting the importance of careful questionnaire design.*

Keywords: *Free-answer questions, multiple-choice questions, question format errors, question-specific errors, questionnaire validity*

INTRODUCTION

Questionnaires are one of the most important means of gathering information, used for a variety of reasons in private as well as in a professional context. Beside private individuals especially companies, public institutions and even supervisory authorities use this tool to obtain and analyse needed information. Its widespread use is due to its supposedly simple creation, design and use. However, only in few cases are the inherent negative aspects sufficiently taken into account. Scientifically, questionnaires are susceptible to a wide variety of errors and may only be limited suitable for obtaining valid answers. The measurement errors considered in this paper are embedded in a variety of possible errors in the use of questionnaires. Basically, they can be divided into two categories: respondent-specific aspects, and thus in particular cognitive-psychological sources of error, and methodological errors. Cognitive or psychological biases relate, for example, to false memories, inadmissible contextual conclusions or influencing the respondent through the sequence of questions or the answer format. Methodological errors, which include the measurement error considered in more detail, include aspects such as sampling and scoping errors, relevant aspects that where not questioned, errors regarding coverage or non-response and, in particular, information processing errors. The measurement errors examined in this paper pertain specifically to question format errors. Fig. 1 provides an overview of question format-specific errors¹.

Question format-specific errors			
Dead end questions	Distinctions w/o differences	Double-barreled questions	Double-negative questions
False premises questions	Free answer questions	Hypothetical questions	Loaded questions
Multiple choice-questions	Or what questions	Overleaping questions	Sleeper questions
Unanswerable questions			

Fig. 1. Overview of question format-specific errors in alphabetical order
(figure by the author; based on Payne 2014)

After introducing the methodology, this paper discusses selected question format-specific errors to consider for obtaining accurate and meaningful information from questionnaires.

RESEARCH METHODOLOGY

Various academic fields provide insights into error sources in questionnaires. This paper examines current research in depth. The assessment relies on a wide variety of sources, such as published books, scholarly journals, research papers, and web publications across different disciplines.

RESULTS

Multiple-choice questions are widely utilised in questionnaires, and are for instance the most common method employed in written examinations (Natekar, DeSouza and Karapurkar 2016, p. 558). The frequency with which multiple-choice questions are used is accompanied by the prevalence of construction errors that jeopardise their validity (O'Neill et al. 2019, p. 51). As with any form of closed question, response options that are not listed are rarely considered by respondents in multiple-choice questions, instead, respondents tend to select options that they might not have chosen or might have forgotten otherwise, just because they are stated (Sheatsley 1983, pp. 206–208). Furthermore, specific biases exist in the use of multiple-choice questions. When multiple-choice questions are employed to assess knowledge, two potential sources of error are identified: test wiseness and irrelevant difficulty (Case and Swanson 2002, p. 19). Test wiseness enables the respondent to select the correct or desired answer, without employing the requisite knowledge. This might occur, for instance, if distractors do not follow grammatically from the stem, or if terms such as “always” or “never” are used in the options (Townes 2014, p. 1428). Additionally, it is worth noting that in multiple-choice questions, the correct answer may be chosen purely by chance (Fowler 1995, p. 69). Further pertinent is the construction flaw irrelevant difficulty. This pertains to the poor design of multiple-choice questions in questionnaires. Validity can be compromised, particularly through the use of lengthy, complex, or inadequately distinct answer options, potentially incorporating vague terms, inconsistent presentation of numeric data, or simply complicated wording (Case and Swanson 2002, pp. 22–25). The case where numeric data are not stated consistently is illustrated by the example in Fig. 2. Here, five answer options are used, some of which overlap. In such cases, the validity of the questionnaire is likely to be compromised, and they should therefore be prevented through careful editing and revision. It should be noted that drafting a good multiple-choice question can take an hour or more, even for professional item writers (Albanese and Gjerde 1987, p. 280). Therefore, careful preparation of questionnaires is likely to require several working days. In light of this, there may be a temptation to use free-answer questions instead of multiple-choice questions. However, Bradburn (1983, p. 300) concludes that free-answer questions are not superior in eliciting responses of greater validity.

Tick	How long is the guaranteed response time for level 1 security incidents?
<input type="checkbox"/>	Under 1 h
<input type="checkbox"/>	30 – 60 min
<input type="checkbox"/>	¼ working day
<input type="checkbox"/>	1-3 h
<input type="checkbox"/>	4 h to 300 min

Fig. 2. Example for numeric data that is unclear and not stated consistently in multiple-choice questions (figure by the author)

The benefits associated with **free-answer question** formats, including diminished biases due to the absence of predefined response options and the capacity to capture nuanced and complex security measures (Connor-Desai and Reimers 2019, p. 1427), are offset by certain drawbacks that may undermine the validity of such questions. The necessity of coding responses introduces the potential for errors at this stage. Moreover, free-answer questions occupy a unique position with respect to non-response error, as their implementation is often associated with a higher rate of abandonment (Connor-Desai and Reimers 2019, p. 1438). Even if there is a compulsion to answer, abandonment is to be expected, for example in the form of answers being given at random without reflection on the content. One reason for this is the greater time required to respond (Vicente and Reis 2010, pp. 260–261). Andrews (2005, p. 3760) reported non-response rates for free-answer questions of up to 76%, while the average rate across all questions was merely about 2%. Respondents who choose to answer free-answer questions, particularly when these are not mandatory, tend to be disproportionately those who are dissatisfied and provide negative feedback (Macey 1996, p. 229), but the majority of respondents do not answer free-answer questions (Griffith 1999, pp. 1002–1004). This phenomenon, known as positive-negative asymmetry, imply that responses to free-answer questions are disproportionately negative.

Further to be considered are **dead-end questions**, defined as queries that cannot be answered meaningfully, as they do not provide an opportunity for a truthful and accurate response. They often contain problematic keywords such as “never”, “all” or “every” (Payne 2014, pp. 192–193). A pertinent example in the professional field might be questions such as “Are all possible measures implemented?” or “Are all legal regulations adhered to as comprehensively as possible?”. Although the issues inherent in these examples may appear evident, such questions are commonly encountered in practice and even in legal directives, see e.g. Art. 28 (5) EU Digital Operation Resilience Act from 2023.

This analysis pertains to the difficulties that can arise when questions cannot be meaningfully distinguished in terms of their content. For example, the questions “When was this measure implemented?” and “Since when has this measure been in place?” may not offer a substantive difference in terms of their content. Such indistinguishability may lead respondents to question the validity of the questionnaire, potentially resulting in less truthful or precise responses, and an inclination to infuse personal interpretations and contextual information (Schober and Clark 1992, pp. 27–28). An indication that respondents may be struggling to differentiate between questions, or that the questions are contextually redundant, can be observed when respondents annotate their responses with comments such as “Answer see question [...]”. The intentional use of similar questions as sleeper questions to detect inattentive respondents will be addressed later.

When two distinct issues are addressed within a single query, it is termed a **double-barrelled question** (Sheatsley 1983, p. 216). This presents a challenge for respondents, particularly when the format is not free-answer. Consider the question: “Does the organisation ensure that all data is encrypted and backed up regularly?” In this case, the question conflates two issues, making it difficult for the respondent to provide a precise answer if they agree with one aspect but not the other. It is noteworthy that this example of a double-barrelled question is additionally a dead-end question, as it queries “all data”.

Double-negative errors arise when a question is framed with two negative terms, potentially leading to increased cognitive effort required for comprehension and subsequent misinterpretation by the respondent. Over a century ago, Wembridge and Means (1918) investigated ambiguities in voting due to the use of negatives and found that positively framed questions were more easily understood, whereas their negative counterparts were deemed highly confusing. Similarly, Blankenship (1943, p. 59) concludes unsurprisingly, that phrasings expressed positively are more likely to be comprehended correctly.

A **false premise error** occurs when a question is based on an assumption that is not entirely or only partially true, potentially leading to biased responses and incorrect information from the respondent. An example might be a question concerning the frequency of salary increase, which presupposes that these increases are happening.

When using **hypothetical questions**, questions concerning future scenarios rather than actual past events or current practices, it is important to recognise that responses to these questions, while appearing reasonable, often do not align with the actions or behaviours that would occur if the proposed scenario were to materialise and ultimately may not reflect the truth (Payne 2014, p. 198; Kaderabek and Sinibaldi 2022). This includes “what-if” questions and questions regarding the intention to act, which Sheatsley (1983, p. 217) has even described as “useless and worthless as predictors”. Although it may sometimes be necessary to pose hypothetical questions, it should be noted that respondents are generally poor at predicting the future, including their own future behaviour (Payne 2014, p. 198). This difficulty arises due to changing circumstances and the many situational variables that intervene (Sheatsley 1983, p. 218).

Loaded questions hold a special position due to their inherent nature of suggesting a particular response, thereby typically making respondents’ effort to disagree greater than to agree. However, the creator of a questionnaire can leverage this phenomenon. Kinsey et al. (2023, pp. 53–54) highlight that loaded questions can decrease the burden of admitting negative aspects. Thus, a question such as “Many organisations may not implement all required security measures. Which requirements have not yet been implemented in your organisation?” might be better suited than unloaded questions to identify missing security measures. By phrasing the question this way, the respondent is indirectly informed that missing measures are considered normal and that it is acceptable to report them (Sheatsley 1983, p. 215).

The potential use of **sleeper questions** aims to identify inattentive respondents by repeating similar questions multiple times to assess whether the respondent provides consistent answers. Further possible is the providing of answer options that are non-existent. A classic example shows that approximately 70% of respondents provided answers related to a fictitious act, thus being identified as sleepers (Gill 1947 as cited in Westle 2024, p. 238). However, later studies have reported a lower percentage, with Schuman and Presser (1980, p. 1214) noting figures between 25% and 30%. It is important to note that such attentiveness checks carry the risk that respondents who recognise the test may either terminate the questionnaire or alter their responses.

CONCLUSION

A large number of errors related to question format were identified, which are also interrelated and must be taken into account when designing questionnaires. For many of the biases discussed, it can be noted that experts in question design are less likely to make them. However, the creators of business-related questionnaires are generally not experts in question formulation, and thus seemingly obvious and simple mistakes still have relevance and need to be considered. Siddiqui (2024, p. 36) found that 38% of multiple-choice questions had errors, and 12% of the questions even had multiple errors. It was further shown that selected phenomena can be utilised and how this can be used to obtain necessary information. This paper provides an introduction to research on how these question-related errors influence the trustworthiness of questionnaires and forms the basis for further considerations regarding detailed design specifications for questionnaires.

NOTES

1. Due to the large number of sources of error, it is not possible to give equal weight to all possible negative influencing factors. Given their significant relevance in professional context, multiple-choice questions and free-answer questions are accorded priority and are examined in greater detail. Or what-questions and unanswerable questions are not discussed in this paper.

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ГРЕШКИ ПРИ ИЗМЕРВАНЕТО ВЪВ ВЪПРОСНИЦИТЕ: АНАЛИЗ НА ГРЕШКИТЕ, СПЕЦИФИЧНИ ЗА ФОРМАТА НА ВЪПРОСА

Резюме: В тази статия се разглеждат грешките при измерването във въпросниците, като се обръща внимание на грешките във формата на въпроса, които могат да повлияят на валидността. Чрез обстоен литературен преглед са идентифицирани 13 вида грешки, като се обръща специално внимание на въпросите с избираем отговор и въпросите със свободен отговор. Резултатите показват, че въпросите с избор между няколко отговора, наред с други, са обект на „мъдрост на теста“, докато въпросите със свободен отговор водят до по-висок процент на неотговаряне. Обхванати са различни видове грешки, включително въпроси тип „задънена улица“, въпроси с двоен отговор и натоварени въпроси. Разследването разглежда и стратегическото използване на определени видове въпроси за получаване на по-валидни отговори. Това изследване показва как грешките, свързани с въпросите, влияят върху надеждността на въпросника. То осигурява основа за подобряване на разработването на въпросници, което е ценно за практикуващите специалисти, които не са експерти. Целта на настоящата статия е да се повиши валидността и надеждността на информацията, събрана чрез този широко използван инструмент, като се подчертае значението

на внимателното разработване на въпросника.

Ключови думи: въпроси със свободен отговор, въпроси с избор между няколко отговора, грешки във формата на въпроса, специфични грешки във въпроса, валидност на въпросника

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

EVALUATING LEADERSHIP POTENTIAL: THE IMPACT OF NONVERBAL BEHAVIORS AND STRESS RESPONSES IN HIGH-STAKES INTERVIEWS

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Abstract: *This study explores the relationship between nonverbal behaviors and stress responses in candidates for leadership positions, focusing on how demographic factors such as age, gender, and position influence these cues. Through analysis of eye contact, gestures, posture, and stress indicators like sweating and trembling, the study identifies patterns that reveal underlying differences in candidate stress management and nonverbal expression. Notably, older candidates and those applying for higher-level roles (e.g., C-Suite) exhibited controlled gestures, open body posture, and reduced signs of nervousness, while younger candidates displayed more visible stress responses. Using correlation heatmaps and bar charts, the research highlights significant associations, providing insights into the role of nonverbal communication in high-stakes interviews. The findings underscore the value of nonverbal indicators in assessing leadership competencies, offering recommendations for interviewer training, leadership development, and objective evaluation frameworks to enhance hiring practices in organizational settings.*

Keywords: *Nonverbal Communication, Stress Responses, Leadership Assessment*

INTRODUCTION

In professional settings, particularly in leadership interviews, nonverbal cues and stress responses are critical factors in candidate evaluation. Research suggests that nonverbal behaviors, such as eye contact, facial expressions, and body language, significantly influence perceptions of leadership potential, confidence, and interpersonal effectiveness. These behaviors can also be indicators of underlying stress, which can impact both candidate performance and interviewer assessments. This study explores the relationship between observed nonverbal cues and stress responses during interviews for leadership roles.

As organizations increasingly prioritize emotional intelligence and stress management in leadership competencies, understanding these nonverbal indicators has become essential. By analyzing behavioral patterns and their connections to stress responses, this research seeks to provide insights into the predictive value of nonverbal cues and stress markers. The findings aim to inform interview techniques and evaluation methods, enhancing the ability to assess leadership qualities in high-stakes scenarios.

RESEARCH METHODOLOGY

This study examines the relationship between nonverbal behaviors and stress responses in candidates for leadership roles. The methodology includes defining the hypothesis, identifying variables, describing the data collection process, and detailing the survey and observational instruments.

Hypothesis

Based on literature connecting nonverbal communication with perceptions of leadership (Riggio & Feldman 2005; Goman 2011), the study hypothesizes the following:

- **H1:** Nonverbal behaviors, such as eye contact, gestures, and open body posture, correlate with candidates' stress responses, both of which are influenced by demographic factors such as age, gender, and position applied for.

Additional hypotheses were formulated:

- **H2:** Older and more experienced candidates display fewer visible signs of stress, such as fidgeting and observable nervousness, than younger candidates (McCarthy et al. 2013).
- **H3:** Candidates for higher-level leadership roles are more likely to exhibit nonverbal behaviors

traditionally associated with authority (e.g., open posture and steady eye contact) than those applying for mid-level positions (Burgoon et al. 2016).

Variables

1. Independent Variables:

- **Demographic Variables:** Age, Gender, and Position Applied For are considered demographic predictors, as research has shown these factors impact nonverbal behavior and stress levels in high-stakes contexts (Gifford 1991; Schmid Mast & Hall 2004).
- **Nonverbal Behavior Variables:** Observed behaviors were coded as follows:
 - Eye Contact (Observed/Not Observed, Frequency Count)
 - Facial Expression (Observed/Not Observed, Frequency Count)
 - Body Posture (Open/Closed, Frequency Count)
 - Gestures (Observed/Not Observed, Frequency Count)
 - Fidgeting (Observed/Not Observed, Frequency Count)
 - Overall Demeanor (Calm/Anxious, Frequency Count)

2. Dependent Variables:

- **Stress Response Variables:** Given the established connection between stress and physiological signals (Ekman & Friesen 1974), the study measured:
 - Sweating (Observed/Not Observed, Intensity: Low/Moderate/High)
 - Trembling (Observed/Not Observed, Intensity: Low/Moderate/High)
 - Voice Modulation (Observed/Not Observed, Intensity: Low/Moderate/High)
 - Speech Rate (Observed/Not Observed, Intensity: Low/Moderate/High)
 - Observable Nervousness (Observed/Not Observed, Intensity: Low/Moderate/High)

Data Collection Process

The data collection followed a structured, observational protocol informed by previous studies on nonverbal behavior analysis in professional settings (Patterson 2011; Riggio 2013). Observations were conducted during leadership interviews in a controlled environment.

- **Participants:** A purposive sample of 62 candidates for roles ranging from Manager to C-Suite was selected. Candidate age averaged 37.7 years, with a gender distribution of 52% male and 48% female, reflecting typical diversity in leadership pools (Sy et al. 2010).
- **Interview Environment:** Interviews were conducted in a quiet, standardized setting designed to minimize external influences on candidate behavior, allowing more accurate assessment of nonverbal cues under interview stress (DeGroot & Gooty 2009).
- **Observers:** Trained observers coded nonverbal behaviors using a validated coding scheme adapted from the Nonverbal Communication in Human Interaction framework (Knapp, Hall & Horgan 2013). Observers were calibrated prior to data collection to enhance reliability, as research underscores the importance of observer training in nonverbal studies (Mehrabian 1971).

Survey Instrument and Observation Metrics

The survey instrument was a structured observational checklist designed to capture the frequency and intensity of each behavior and stress response. This instrument was adapted from validated measures used in workplace and psychological research to ensure consistency (Patterson et al. 2007).

1. Nonverbal Behavior Metrics:

- Nonverbal behaviors, such as eye contact and gestures, were recorded as binary indicators (observed/not observed) and counted for frequency. Posture was categorized as “Open” or “Closed,” with demeanor noted as “Calm” or “Anxious” (Gifford 1991).

2. Stress Response Metrics:

- Physiological stress responses, including sweating and trembling, were recorded based on

observation and rated for intensity (Low, Moderate, High) following established protocols (Ekman 2003). Vocal stress indicators (e.g., voice modulation) were assessed due to their known association with stress (Burgoon & Dunbar 2000).

3. Reliability and Validity:

- Observers participated in a calibration session before data collection to ensure consistent interpretations. Inter-rater reliability was assessed through consensus on a subset of candidate observations, enhancing the study's internal consistency (Landis & Koch 1977).

Statistical Analysis

The statistical approach included descriptive and inferential analyses, consistent with methods in leadership and behavioral research (Bryman 2015). Descriptive statistics summarized behavior frequencies and demographic distributions, while inferential statistics explored correlations between variables.

- **Correlation Analysis:** Pearson's correlation was used to evaluate relationships between nonverbal cues and stress responses, supported by significance testing ($p < .05$) to determine the strength of associations (Field 2013).
- **Data Transformation:** Categorical data were coded numerically (e.g., "yes" as 1 and "no" as 0) to facilitate correlation and regression analyses, a common practice in social science research (Cohen et al. 2013).

This methodological framework aligns with established approaches in observational studies on nonverbal behavior, enhancing the reliability and validity of the results (Riggio 2013; Patterson, 2011).

RESULTS

This section presents the findings from statistical analyses, focusing on the correlation between nonverbal behaviors, stress responses, and demographic factors. Figures 1–11 illustrate these relationships, and statistical interpretations are provided to explain significant patterns.

1. Correlation Analysis (Figure 1)

The correlation analysis revealed several statistically significant relationships among candidate demographics, nonverbal behaviors, and stress indicators, with Pearson correlation coefficients (r) and significance levels ($p < 0.05$).

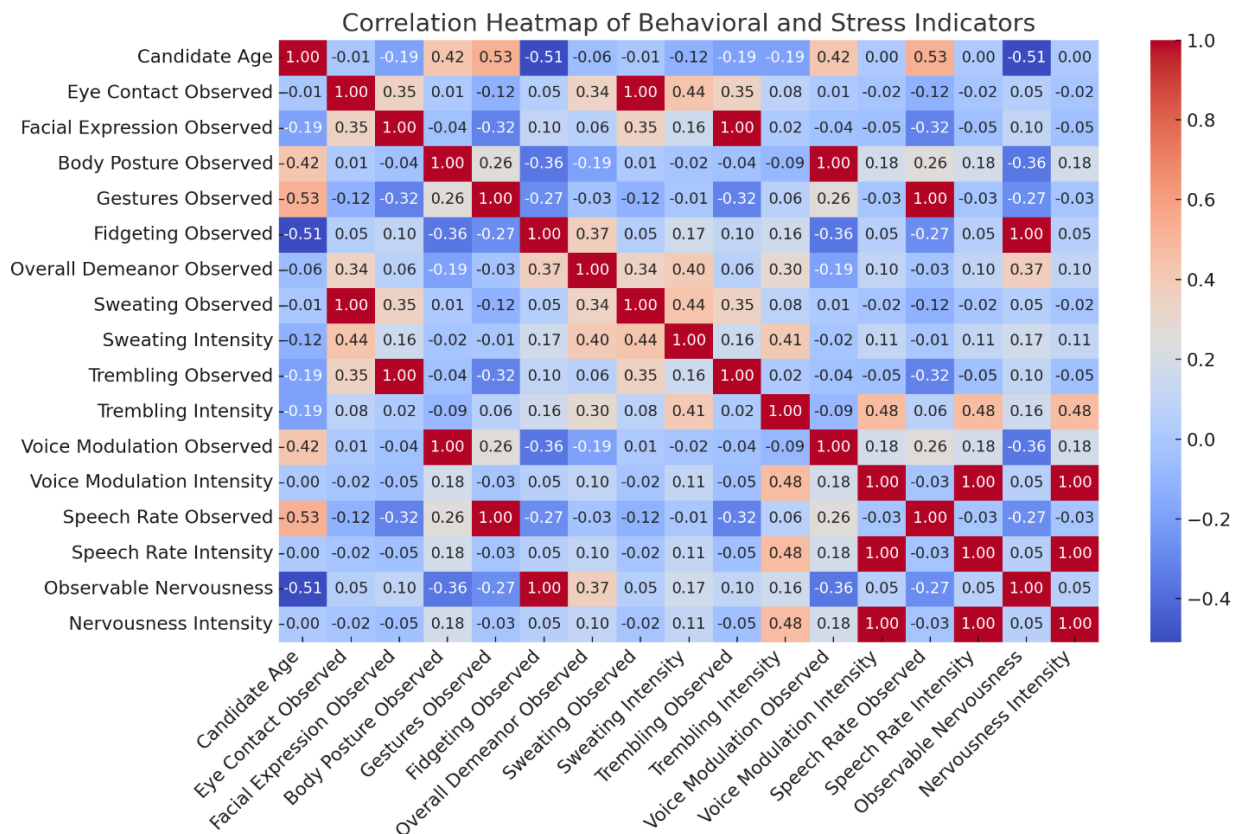


Fig. 1. Correlation Heatmap of Behavioral and Stress Indicators

- Age and Nonverbal Control:** A significant negative correlation was found between age and fidgeting ($r = -0.51$, $p < 0.01$), suggesting that older candidates displayed lower levels of observable nervousness. This result aligns with literature indicating that experienced individuals manage visible stress more effectively in high-stakes contexts (McCarthy et al. 2013). The positive correlation between age and controlled gestures ($r = 0.53$, $p < 0.01$) further supports the hypothesis that age and experience contribute to nonverbal control.
 Eye Contact and Facial Engagement: A moderate positive correlation between eye contact and facial expression frequency ($r = 0.35$, $p < 0.05$) was observed, indicating that candidates who maintained eye contact were also more expressive. This relationship could reflect heightened engagement or stress (Gifford 1991). The significant association between eye contact and sweating ($r = 0.44$, $p < 0.05$) may imply that candidates who actively engage with interviewers exhibit physiological stress responses, potentially due to the cognitive demand of sustained interaction.
 Gestures as a Counterbalance to Nervousness: Gestures were negatively correlated with fidgeting ($r = -0.27$, $p < 0.05$), implying that candidates who used gestures more frequently were less likely to exhibit nervous behaviors. This aligns with the hypothesis that purposeful nonverbal cues can help candidates manage stress effectively. As noted by Burgoon & Dunbar (2000), gestures can project confidence, potentially masking internal stress.

Interpretation: The significant correlations observed suggest that nonverbal behaviors can serve as indicators of stress levels and coping mechanisms, with age and experience emerging as influential factors. This implies that interviewers may need to account for these nonverbal cues when evaluating candidate composure and leadership potential.

The bar charts (Figures 2–6) show the frequency distribution of observed nonverbal behaviors, providing insights into how these behaviors vary across demographic groups and positions.

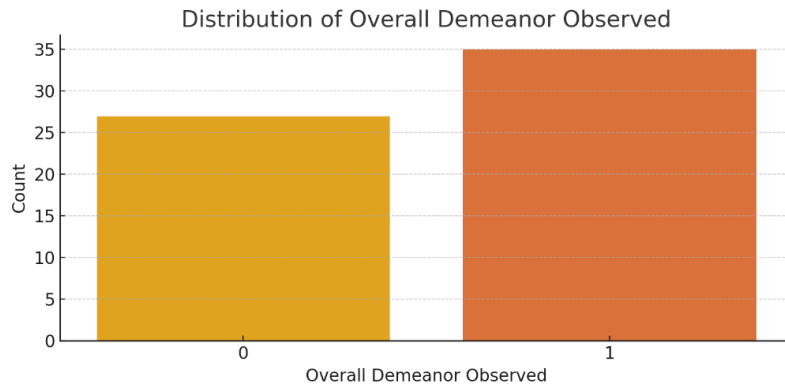


Fig. 2. Distribution of Overall Demeanour Observed

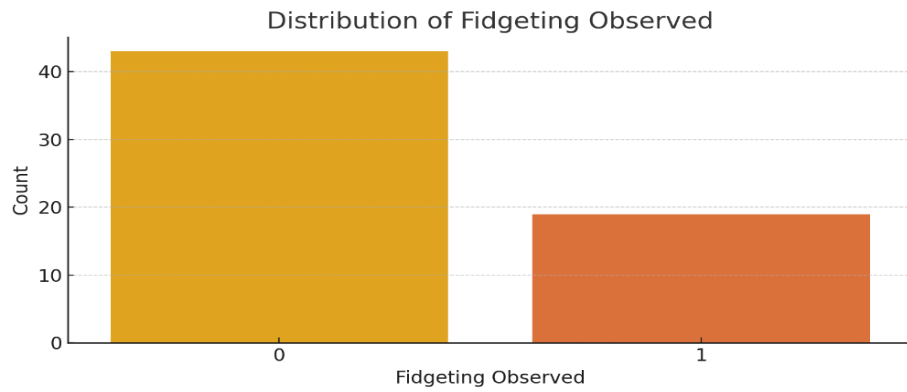


Fig. 3. Distribution of Fidgeting Observed

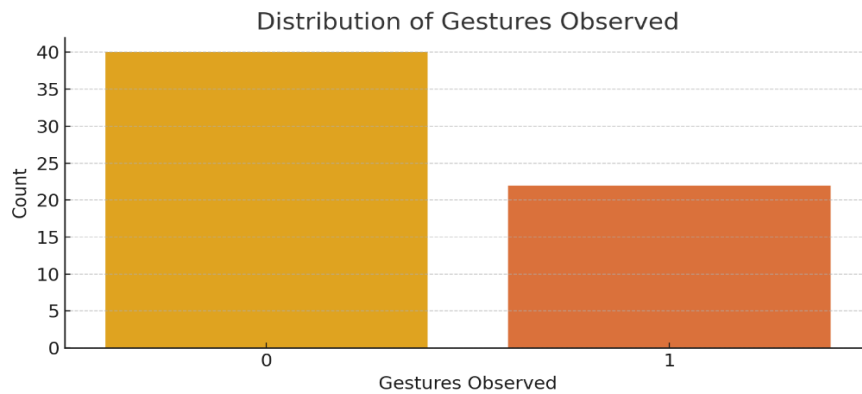


Figure 4. Distribution of Gestures Observed

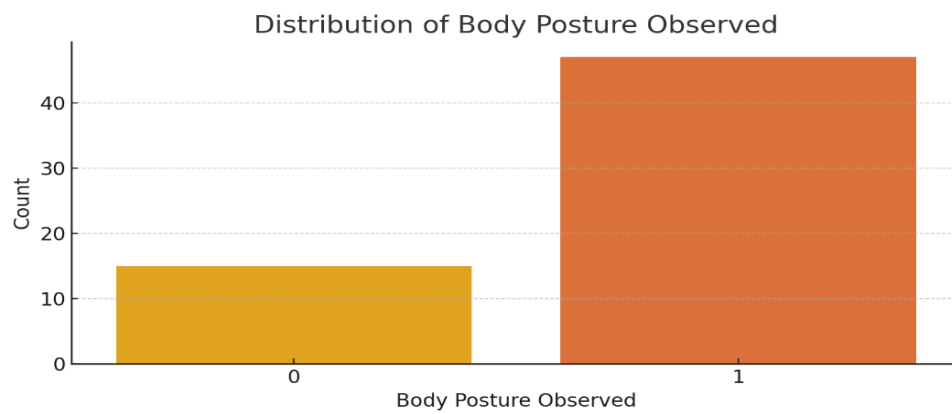


Fig. 5. Distribution of Body Posture Observed

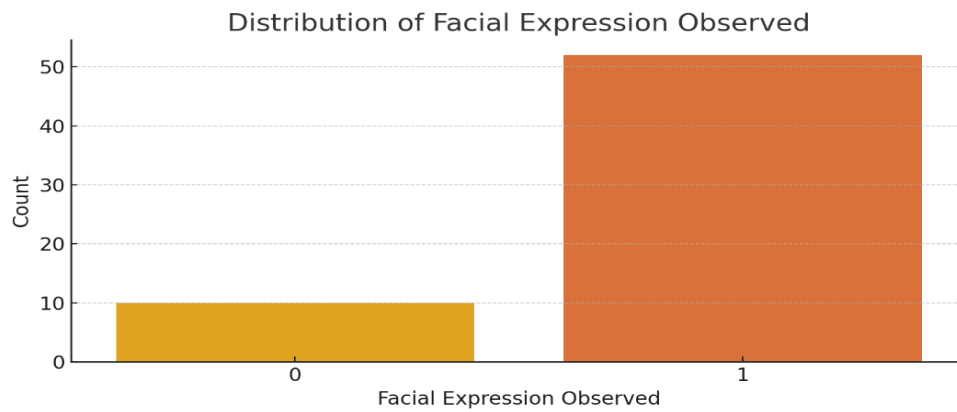


Fig. 6. Distribution of Facial Expression Observed

The bar charts (Figures 2–6) show the frequency distribution of observed nonverbal behaviors, providing insights into how these behaviors vary across demographic groups and positions.

- Eye Contact Across Roles:** Figure 2 indicates that a majority of candidates (87%) maintained eye contact consistently, with a particularly high frequency among candidates for managerial roles. The positive association between role level and eye contact may reflect an awareness of the importance of direct engagement in management positions (Riggio 2013).
 Body Posture and Open Presence: As shown in Figure 3, open body posture was more commonly observed in candidates applying for C-Suite and VP roles. The positive correlation with age and senior roles suggests that candidates perceive open posture as a means of projecting authority and confidence, qualities desirable in high-level leadership (Patterson 2011).
 Controlled Gestures and Reduced Nervousness: In Figure 4, gestures were observed in 72% of candidates, while fidgeting was relatively infrequent, particularly among older candidates (Figure 5). This supports the interpretation that candidates, especially those with experience, use gestures as a coping mechanism to manage and mask visible nervousness.

Interpretation: The distributions show that nonverbal behaviors are not uniformly displayed across candidates but instead reflect role expectations and demographic characteristics. Recognizing these trends may help organizations develop more objective assessment criteria that account for individual nonverbal styles while evaluating stress resilience and suitability for leadership roles.

2. Stress Response Distributions (Figures 7–12)

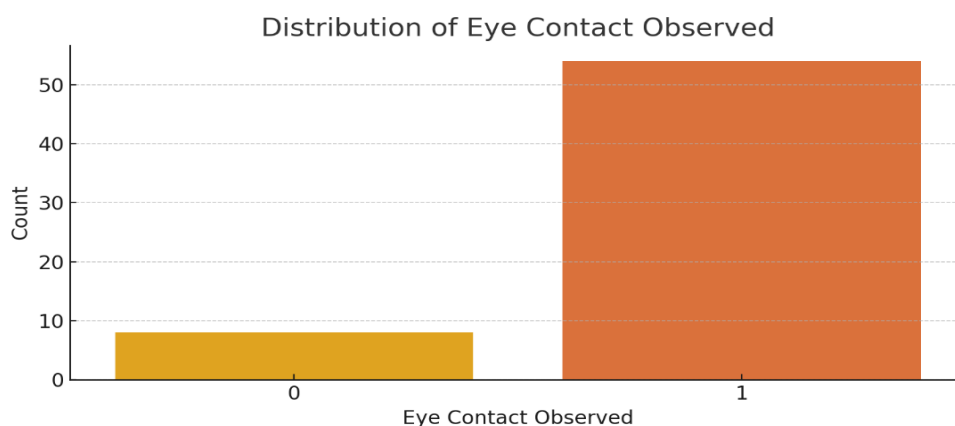


Fig. 7. Distribution of Eye Contact Observed

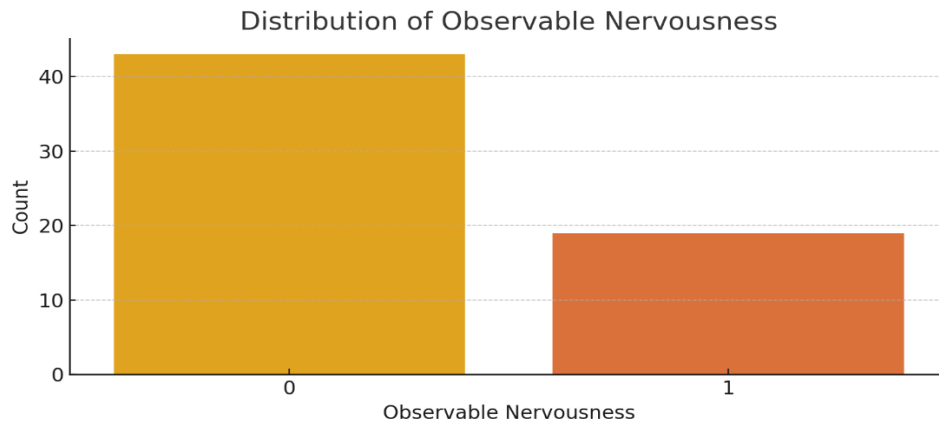


Fig. 8. Distribution of Observable Nervousness

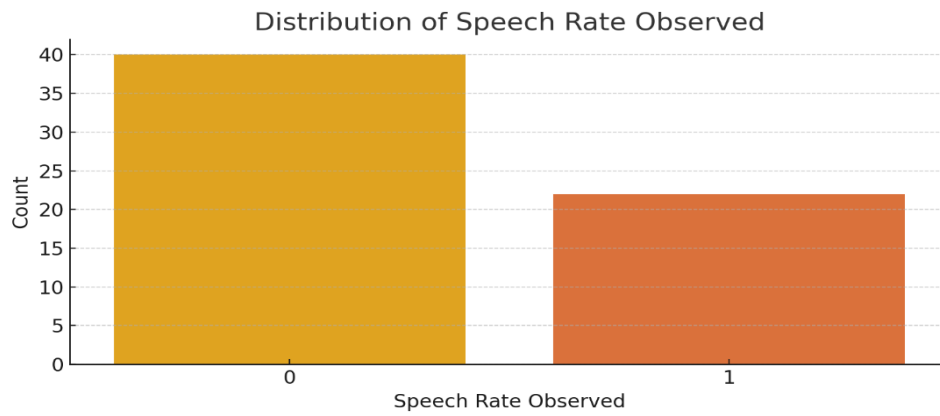


Fig. 9. Distribution of Speech Rate Observed

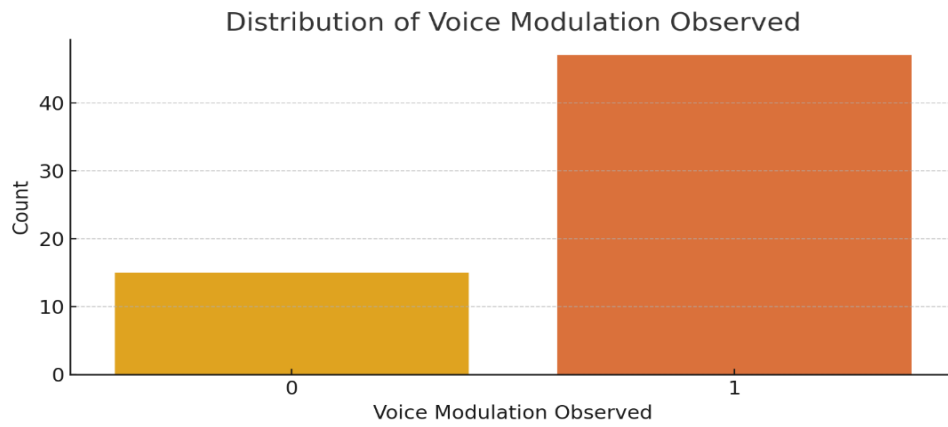


Fig. 10. Distribution of Voice Modulation Observed

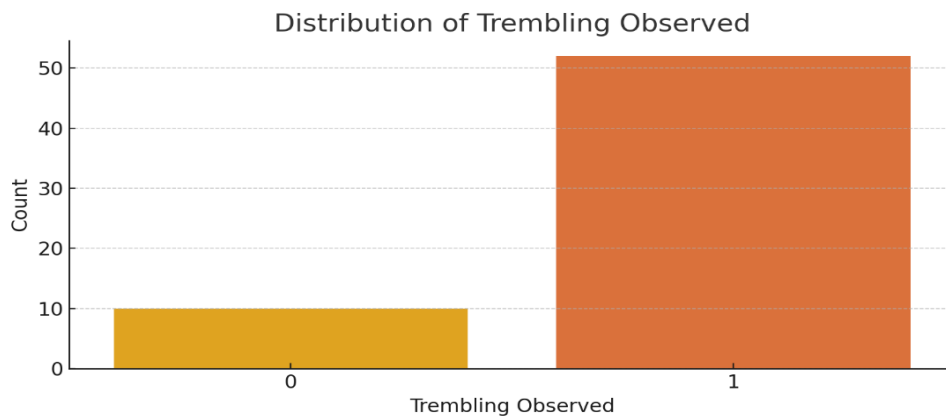


Fig. 11. Distribution of Trembling Observed

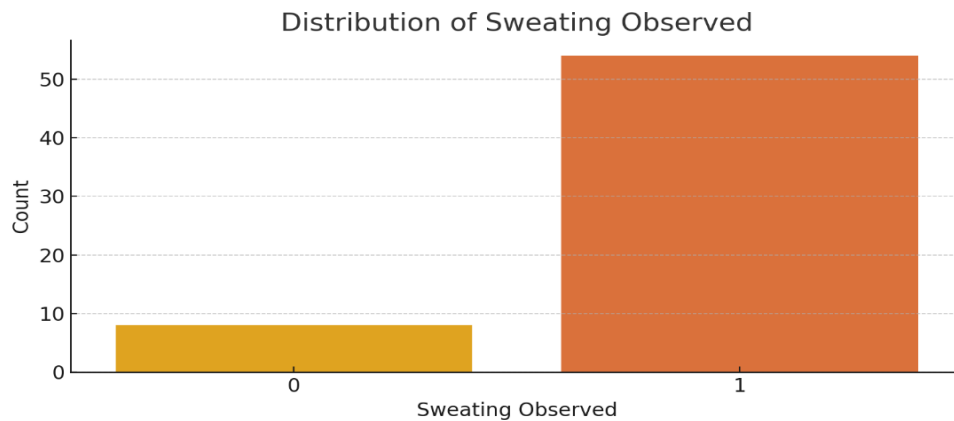


Fig. 12. Distribution of Sweating Observed

Stress responses, including sweating, trembling, and voice modulation, were examined for intensity and frequency. Statistical analysis was conducted to compare stress responses across age groups and positions, providing a nuanced understanding of physiological and vocal indicators of stress.

- Sweating and Trembling:** Figure 12 shows that sweating was a common physiological stress response, observed across candidate demographics. Trembling (Figure 11) was less common and varied in intensity, with moderate levels more frequently noted in younger candidates ($t = -2.15$, $p < 0.05$ for age and trembling intensity). This result aligns with prior findings that younger individuals may display more visible physiological responses under stress (Ekman 2003).
 Voice Modulation and Speech Rate: Voice modulation was recorded in 75% of candidates, generally at low to moderate intensity (Figure 8). A significant association between age and voice modulation intensity ($r = -0.42$, $p < 0.01$) indicates that younger candidates tend to exhibit higher vocal stress indicators, suggesting they experience greater vocal tension under interview conditions (Burgoon et al. 2016).
 Observable Nervousness: Observable nervousness (Figure 8) was significantly correlated with fidgeting ($r = 0.47$, $p < 0.01$) and age ($r = -0.49$, $p < 0.01$), supporting the hypothesis that younger candidates exhibit more visible stress behaviors. This finding is consistent with literature suggesting that nonverbal signs of anxiety are more frequent among less experienced individuals (Goman 2011).

Interpretation: These findings suggest that physiological stress indicators, such as voice modulation and trembling, may reflect experience levels, with younger candidates displaying higher stress responses. This highlights the need for interviewers to consider the age and experience of candidates when interpreting these stress signals to avoid potential biases.

Recommendations:

1. Training for Interviewers

The findings demonstrate significant associations between age, role level, and specific nonverbal cues such as eye contact, gestures, and body posture. It is recommended that interviewers be trained to recognize these nonverbal indicators, as they may reflect a candidate's comfort and stress management capabilities. For instance, as shown in the body posture chart, open posture is more commonly observed in senior candidates, while younger candidates display gestures differently across roles. Training interviewers to interpret these cues appropriately could enhance the accuracy of evaluations regarding candidate resilience and leadership potential.

2. Leadership Development Programs

For candidates, particularly those transitioning into leadership roles, targeted training in nonverbal communication can strengthen stress management abilities and help project confidence. Younger candidates display more observable stress responses, such as sweating and trembling, indicating areas for potential development. By cultivating awareness of controlled gestures, open posture, and voice modulation,

candidates can be better prepared for high-stakes environments. This recommendation supports leadership development programs aimed at building a robust nonverbal skill set for effective stress management.

3. Objective Evaluation Frameworks

To minimize subjective bias, organizations might consider standardizing their assessment criteria by incorporating validated nonverbal and stress indicators. There are distinct nonverbal behavior patterns across leadership roles. For example, eye contact and gestures are more prevalent in candidates for managerial roles, highlighting how behavior expectations vary by position. Standardizing behavioral metrics can contribute to a fairer and more accurate evaluation process, especially for younger or less experienced candidates, ensuring that each candidate's nonverbal and stress response behaviors are consistently assessed.

CONCLUSION

This research paper investigated the relationship between nonverbal behaviors and stress responses in candidates interviewing for leadership roles, emphasizing how demographic factors like age, gender, and position influence these behaviors. Through statistical analysis and visualization of behaviors such as eye contact, body posture, gestures, and stress indicators (e.g., sweating and trembling), the study provided insights into patterns of candidate stress management and nonverbal communication styles.

Key findings revealed that older and more experienced candidates tend to exhibit controlled nonverbal behaviors, including open body posture and reduced fidgeting, which align with leadership qualities like confidence and composure. Candidates applying for higher-level positions, such as C-Suite and VP roles, were more likely to demonstrate nonverbal cues indicative of authority, such as consistent eye contact and a calm demeanor. Conversely, younger candidates often displayed more observable stress responses, suggesting a potential area for development in stress management as they transition into leadership roles.

The results support the need for actionable recommendations, including specialized training for interviewers to interpret nonverbal cues, leadership development programs to enhance candidates' nonverbal communication skills, and standardized evaluation frameworks to ensure fair assessments. By implementing these recommendations, organizations can enhance the accuracy and fairness of their hiring processes, ensuring that candidates are evaluated not only for their verbal responses but also for their ability to convey leadership qualities through nonverbal behavior.

In sum, this study contributes to the understanding of nonverbal communication in leadership assessments, underscoring the importance of integrating nonverbal indicators into hiring practices. Future research might expand on this work by exploring how nonverbal behaviors evolve as individuals gain leadership experience or by investigating the impact of specific nonverbal training on candidate performance in interviews. Through a better understanding of these dynamics, organizations can cultivate more effective and stress-resilient leaders, ultimately strengthening their leadership pipelines.

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ОЦЕНЯВАНЕ НА ЛИДЕРСКИЯ ПОТЕНЦИАЛ: ВЛИЯНИЕ НА НЕВЕРБАЛНОТО ПОВЕДЕНИЕ И РЕАКЦИИТЕ НА СТРЕС ПРИ ИНТЕРВЮТА НА ХОРА С ОТГОВОРНИ ПОСТОВЕ

Резюме: Това проучване изследва връзката между невербалното поведение и реакциите на стрес при кандидатите за ръководни длъжности, като се фокусира върху това как демографските фактори като възраст, пол и длъжност влияят върху тези сигнали. Чрез анализ на зрителния контакт, жестовете, позата и индикаторите за стрес, като изпотяване и треперене, проучването идентифицира модели, които разкриват основните различия в управлението на стреса и невербалното изразяване на кандидатите. По-възрастните кандидати и тези, които кандидатстват за позиции на по-високо ниво (напр. C-Suite), показват контролирани жестове, откритая стойка на тялото и намалени признаци на нервност, докато по-младите кандидати показват по-видими реакции на стрес. С помощта на корелационни топлинни карти и стълбови диаграми изследването подчертава значими асоциации, предоставяйки информация за ролята на невербалната комуникация при интервюта с високи залози. Констатациите подчертават стойността на невербалните индикатори при оценката на лидерските компетенции, като предлагат препоръки за обучение на интервюиращи, развитие на лидерски умения и обективни рамки за оценка с цел подобряване на практиките за наемане на работа в организационна среда.

Ключови думи: невербална комуникация, реакции на стрес, оценка на лидерството

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

METHODS AND APPROACHES FOR MEASURING JOB SATISFACTION

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Abstract: *Companies in the 21st century face a multitude of challenges resulting from technological, economic, social and ecological changes. To continue to withstand the resulting competitive pressure, companies must adapt quickly to changing conditions. To ensure this, it is essential to recruit and retain the right staff. This point is heavily dependent on the prevailing level of job satisfaction. This not only affects the well-being of employees, but also has a direct impact on operational key figures. The key to success is therefore to invest specifically in improving job satisfaction. To ensure this, it is essential to first measure the current level of job satisfaction and then, based on the given framework conditions, to improve it further and to generate a long-term competitive advantage. A variety of methods are used to measure job satisfaction, from standardized questionnaires to qualitative approaches. Quantitative measuring instruments such as standardized questionnaires are convincing due to their comparable and efficient data collection, so that intrinsic and extrinsic factors of job satisfaction can be considered in a differentiated manner. In comparison, qualitative methods such as interviews and narrative approaches provide deeper insights into subjective experiences with individual contextual factors. In the following research paper, job satisfaction is examined in more detail in order to present a selection of methods for its measurement.*

Keywords: *job satisfaction, measurement methods, measurability*

INTRODUCTION

For decades, job satisfaction has been a central topic in organizational psychology and economics. Long-standing studies clearly show that satisfied employees demonstrate higher productivity, lower turnover and greater loyalty to the company, meaning that job satisfaction is a key factor in creating a positive corporate culture and sustainable competitiveness (Fischer, Eufinger 1991, pp. 115–132).

Globalization and digitalization also create an ongoing immense competitive pressure, which companies must withstand in order to continue to be successful. Against this background, there is also a strong interest from a business perspective in strengthening job satisfaction on a sustainable basis. The importance of job satisfaction goes beyond individual and company benefits and is increasingly recognized as an important building block for social well-being and the promotion of humane working conditions (Bruggemann 1974, pp. 281–284).

Since job satisfaction is a significant factor in personnel management, methods and approaches for measuring job satisfaction are indispensable. The current state of empirical research on measuring job satisfaction shows that methodology and interpretation vary greatly and are constantly evolving. In the following paper, based on the definition and the influencing factors of job satisfaction, the focus will be on illuminating the broad range of methods and approaches for measurement. The research goal is to gain a practical understanding of how job satisfaction can be pursued as a strategic goal and sustainably increased.

RESEARCH METHODOLOGY

The present publication is based on a literature review which focuses on the understanding of the methods and approaches for measuring job satisfaction. First, the factor of job satisfaction is defined in more detail using the existing definition and models as well as naming some influencing factors. In the next step, the focus is on the methods of measuring job satisfaction and their significance.

DEFINITION OF JOB SATISFACTION

According to Bruggemann (1975), the concept of job satisfaction includes the correspondence of personal expectations and the professional framework conditions of a work situation. (Bruggemann et

al. 1975, p. 19). Neuberger and Allerbeck further define job satisfaction as a theory based on stimuli and reactions, and thus present it as a series of subjectively assessed situations of a person within the world of work. The resulting interpretation in turn has an influence on future behavior in relation to everyday work (Neuberger, Allerbeck 1978, p. 32). There is another notion according to which job satisfaction represents both a positive and a negative attitude towards work, resulting in satisfaction or dissatisfaction. (Six, Felfe 2004, p. 605).

FACTORS INFLUENCING JOB SATISFACTION

Basically, subjectively perceived job satisfaction varies depending on personal and situational influences. Personal influencing variables consist of dispositional factors, which represent individual and stable personality traits and relate to an employee's personal or inner characteristics and attributes. Dispositional factors are, for example, the ability to cope with stress, emotional stability, values as well as the experience of competence and are based on a positive or negative attitude. In contrast to external factors, such as job conditions or pay, dispositional factors have an indirect effect, as they tend to strengthen or weaken the degree of job satisfaction. The consideration of dispositional factors is essential, as they deepen the understanding of job satisfaction and help to explain the causes of difference in employee satisfaction. Measures to increase job satisfaction can also be developed in a more targeted and customized manner (Drabe 2015, pp. 85–87).

In contrast to personal factors, situational factors relate to external conditions and have a direct influence on job satisfaction. In addition to workplace design such as ergonomic workstations, lighting conditions and room design, situational factors also include work content. Meaningful activities therefore have a positive influence on job satisfaction, whereas monotonous and draining tasks have a negative effect. Management style is also a decisive factor for the level of job satisfaction. Other situational factors include remuneration, opportunities for professional development and working hours (Drabe 2015, pp. 77–85).

In the further course of researching the influencing factors, the interactionist view, i.e. the interaction between personal and situational factors, has become established. For example, according to the person-job fit approach, there is a correlation between the personal factor of work motivation and the situational factor of task characteristics, as intrinsically motivated employees feel greater job satisfaction if their field of work is perceived as meaningful and challenging. On the other hand, if a situational factor such as the task characteristic remains the same, this can be less satisfying for a person with lower intrinsic motivation (Drabe 2015, p. 87).

It should be noted, however, that the empirical study of the interactionist view has been carried out only to a limited degree (Drabe 2015, pp. 87–91).

EXPLANATORY MODELS FOR JOB SATISFACTION

A large number of models and theories of job satisfaction exist in the field of organizational psychology and economics, which can be used as a basis for further empirical studies. The following section takes a superficial look at individual models in order to further promote a basic understanding of the topic of job satisfaction.

Frederick Herzberg developed the two-factor theory in 1959 and based on it, he attempted to explain which factors affect job satisfaction and how. He distinguishes between motivational factors and hygiene factors. Motivational factors such as recognition, appreciation, growth and development opportunities are directly linked to opportunities for personal development and have a positive effect on job satisfaction. Hygiene factors, on the other hand, relate to work environment and the general conditions of work. They are not directly linked to a high level of job satisfaction but prevent the development of job dissatisfaction. The hygiene factors include, for example, remuneration, functional work equipment, sufficient infrastructure and working conditions that do not cause illness. The two-factor theory recommends that job satisfaction and job dissatisfaction should not be viewed one-dimensionally, but rather two-dimensionally in the sense of two separate dimensions. Translated, this means that the absence of dissatisfaction does not directly lead to job satisfaction, as both the motivator factors and the hygiene factors need to be fulfilled. (Ferreira 2019, pp. 37–39).

Despite widespread acceptance and practical application, there are several points of criticism regarding the two-factor theory. On the one hand, methodological weaknesses are criticised, as well as the unclear distinction between motivation and hygiene factors. The two-factor theory also simplifies the complexity of job satisfaction, but this has led to the theory being further developed by other models and supplemented by other perspectives. Despite the points of criticism, Herzberg's two-factor theory is a model that is often used in practice, as it sheds light on the different dimensions of job satisfaction. (Ferreira 2019, pp. 40–41).

Another occupational psychological model is the Job Characteristics Model, which was developed in 1976 by researchers J. Richard Hackman and Greg R. Oldham. It describes how certain job characteristics influence the motivation, satisfaction and performance of employees and consists of five central job characteristics that normally have a positive effect on a person's experience and behavior in work environment. The five work characteristics are:

1. Variety of requirements (the use of different skills)
2. Completeness of tasks (the ability to complete a task in its entirety)
3. Task significance (the awareness that the work is important)
4. Autonomy (scope for control and freedom of choice)
5. Feedback (clear feedback on performance)

According to Hackman and Oldham, these five work characteristics have an effect on three psychological states, which in turn should lead to increased motivation, job satisfaction and performance. The three psychological states are divided into:

1. perceived meaningfulness of work
2. perceived responsibility
3. awareness of the results of one's own work (Ferreira 2019, p. 42).

The Job Characteristics Model is regularly used in personnel development, as it helps to increase work performance and commitment and therefore ultimately job satisfaction through suitable measures. The points of criticism of this model include the simplification of motivation, measurement problems due to subjective perception and the strong emphasis on individual job characteristics, as the model is primarily orientated towards the design of individual jobs and less towards interpersonal cooperation. Nevertheless, it is used very frequently and is considered empirically proven (Ferreira 2019, pp. 43–44).

METHODS FOR MEASURING JOB SATISFACTION

Job satisfaction generally has not only a personal but also a high economic value. Measuring job satisfaction enables companies to make data-based and targeted decisions in order to achieve strategic goals in the long term. The measurement data can also be used as an early warning system for problems as well as a tool for promoting positive effects such as innovation and creativity and also improving the work culture and employee loyalty.

The measurement of job satisfaction has evolved over time from simple surveys to complex, multidimensional models. There are various methods to measure employee job satisfaction, which differ in their depth and approach (Ferreira 2019, pp. 71–74).

STANDARDISED PROCEDURES

On the one hand, questionnaires are used for research purposes to investigate correlations between job satisfaction and other organizational variables. On the other hand, questionnaire-based methods for recording job satisfaction are also used in practice, for example as part of employee surveys. There are numerous scientifically developed and validated questionnaires for measuring job satisfaction that enable a comparable and objective survey across different companies and industries (Ferreira 2019, p. 67).

The Porter Needs Satisfaction Questionnaire (PNSQ) was introduced in 1962 as the first instrument for measuring needs satisfaction in a professional context. Based on Maslow's hierarchical model of needs satisfaction, the focus is on five classes of needs which, when fulfilled, result in job satisfaction. The need classes are as follows:

1. need for security
2. social needs

3. need for prestige
4. need for autonomy
5. need for self-realization (Ferreira 2019, p. 75).

The respondents assess their respective state in relation to each dimension by rating their actual state, the desired state and the importance on a seven-point scale. Within the evaluation, the difference between the actual and target state is determined; the lower the discrepancy, the higher the degree of job satisfaction (Ferreira 2019, p. 75).

By looking at various dimensions of job satisfaction, the PNSQ model enables a detailed analysis of job satisfaction and the associated causes. Due to its practical applicability, it is easy to implement in companies and helps to identify specific weak points in the organisation by comparing needs.

However, there is a limitation with regard to the depth of data research; individual employee situations can only be recorded to a limited extent. It is also only a momentary recording of a subjective assessment on the part of the respondent (Ferreira 2019, p. 76).

Another widely used instrument is the Job Description Questionnaire (ABB), which was developed by Wolfgang Neuberger in Germany in 1978. It is based on the previously developed Job Descriptive Index concept and picks up on various facets taken from empirical research results. These nine aspects include

1. colleagues
2. superiors
3. activity
4. external conditions
5. organization and management
6. professional development
7. pay
8. working hours
9. job security (Ferreira 2019, p. 82).

Due to its sufficient validation and given standardization, the ABB is considered a proven instrument for measuring job satisfaction, as the differentiated view of job satisfaction provides information on entrepreneurial development potential.

One disadvantage is the static nature of the survey, as the respondent's current condition has a strong influence on their subjective views. Furthermore, the comprehensive data collection and evaluation of the questionnaire is time-consuming and resource-intensive (Ferreira 2019, p. 83).

In contrast to previous questionnaires, the Questionnaire for the Evaluation of Job Satisfaction (FEAT) does not record static satisfaction types but takes into account personal and work-related perceptions. The model was developed in 2009 by Yvonne Ferreira based on the Zurich model. The four central core areas are:

1. target/actual comparison
2. perceived controllability
3. regulation of requirements level
4. attempts to solve problems.

The FEAT instrument is a recognized and further developed tool in job satisfaction research, as it can reveal complex correlations by taking external work factors as well as individual psychological aspects into account and reveal potential for improvement.

However, the complexity of the questionnaire can lead to fatigue and a reduced willingness to participate. Similarly, in a constantly changing and digitalised working environment, the questionnaire does not have the same informative value as in a traditional working environment (Ferreira 2019, pp. 85–101).

In general, standardised methods for measuring job satisfaction are convincing due to their efficiency, objectivity and cross-industry comparability of data. Furthermore, there is a high degree of scientific foundation, meaning that many standardised questionnaires have already been validated. Nevertheless, standardised procedures are limited in their depth of information and are characterised by a lack of flexibility. As working conditions change, they need to be regularly updated in order to reflect current issues correctly (Lange et al. 2022, p. 373).

INTERVIEWS

The use of interviews is another method of measuring job satisfaction. A distinction is made between quantitative and qualitative interviews. The former often takes the form of a questionnaire and is therefore considered structured. This means that all questions and their sequence are set out in a fixed order. Due to the strict specifications, the interviewer plays a neutral role, which on the one hand leads to comparable data and simpler evaluation, but on the other hand allows hardly any flexibility, so that individual perspectives are hardly taken into account (Lange et al. 2022, pp. 365–366).

In contrast to quantitative interviews, qualitative interviews are either semi-structured or completely unstructured. In a semi-structured form, a guideline with predefined topics is used, but both the order of the questions and the depth of the questioning can be adapted, as the interviewer has the option of going into more detail on individual answers. A key advantage here is the combination of structure and flexibility, as this allows new topics to be explored, but the evaluation is considered to be significantly more time-consuming (Lange et al. 2022, p. 366).

Unstructured interviews are characterized by the fact that there is no structured questionnaire, only a topic is specified. The flow of the interview is subject to a dynamic form, depending on the respective answers. The advantage of this is that in some cases very in-depth insights are made possible and therefore there is the opportunity to develop innovative perspectives. However, the comparability of the data obtained suffers due to the open form of the interview (Lange et al. 2022, pp. 367–368).

Another instrument used in qualitative research is the narrative interview. The overarching aim here is to encourage the interviewee to speak without being influenced by subjectively perceived experiences and the resulting perspectives. This is achieved by keeping conversations with interviewees open and flexible and focusing on personal narratives on the part of the interviewee. The interviewer himself tries to convey an atmosphere of trust in the introductory phase in order to express an open invitation to the narration of personal attitudes and experiences by means of an initial narrative request. In the course of the interview, the interviewee acts almost unrestrictedly, as the interviewer only tries to deepen narratives by means of comprehension questions (Küsters 2022, pp. 896–897).

The great advantage of this is that subjective experiences and perspectives can be experienced completely unfiltered, which is not possible in the form of standardized measurement methods. However, this is only possible if the interviewee is very willing to talk. Narrative interviews also involve an enormous amount of effort. With regard to the measurement of job satisfaction, it must also be noted that the resulting interpretation of the narratives is heavily dependent on the interviewers themselves, which in turn can have a negative impact on reliability (Küsters 2022, p. 894).

RESULTS

The findings emphasize the variety of possible methods and approaches for measuring job satisfaction and their respective advantages. However, the corresponding points of criticism are also deliberately mentioned. As a result, it becomes clear that the choice of the appropriate measurement method depends on the cultural and economic context. By incorporating qualitative elements within measurement methods, it is possible to go beyond standardized processes to record not only quantitative but also subjective perceptions and thus develop individual and targeted approaches to improving job satisfaction.

CONCLUSIONS

As job satisfaction is subject to a large field of research, only a specific selection of methods and approaches for measuring job satisfaction can be considered in more detail in this paper. Other instruments for measuring job satisfaction can include feedback interviews, employee turnover and productivity measurements, as well as the use of modern digital tools. Further research is needed into the practical implementation of the measurement methods and the challenges that arise. It is also advisable to consider the significance of job satisfaction in the context of New Work and hybrid working models.

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МЕТОДИ И ПОДХОДИ ЗА ИЗМЕРВАНЕ НА УДОВЛЕТВОРЕНОСТТА ОТ РАБОТАТА

Резюме: *Компаниите през XXI в. са изправени пред множество предизвикателства, произтичащи от технологични, икономически, социални и екологични промени. За да продължат да устояват на произтичащия от това конкурентен натиск, компаниите трябва бързо да се адаптират към променящите се условия. За да се гарантира това, от съществено значение е да се набират и задържат подходящите служители. Този момент е силно зависим от преобладаващото ниво на удовлетвореност от работата. То не само влияе върху благосъстоянието на служителите, но и има пряко въздействие върху ключовите оперативни показатели. Следователно ключът към успеха е да се инвестира специално в подобряване на удовлетвореността от работата. За да се гарантира това, е необходимо първо да се измери текущото ниво на удовлетвореност от работата, а след това, въз основа на дадените рамкови условия, да се подобри допълнително и да се създаде дългосрочно конкурентно предимство. За измерване на удовлетвореността от работата се използват различни методи – от стандартизирани въпросници до качествени подходи. Количествените инструменти за измерване, като например стандартизираните въпросници, са убедителни поради съпоставимостта и ефикасността на събирането на данни, така че вътрешните и външните фактори на удовлетвореността от работата да могат да бъдат разглеждани по диференциран начин. За сравнение, качествените методи, като интервюта и наративни подходи, осигуряват по-дълбоко вникване в субективния опит с индивидуалните контекстуални фактори. В статията удовлетвореността от работата е разгледана по-подробно, за да се представи подбор на методи за нейното измерване.*

Ключови думи: *удовлетвореност от работата, методи за измерване, измеримост*

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
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**GENERATION ALPHA AND THE FUTURE WORKFORCE: A THEORETICAL
PERSPECTIVE OF LEADERSHIP EXPECTATIONS**

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Abstract: *The rise of the new Generation Alpha, individuals born between the year 2010 and 2024, will essentially impact the workforce dynamics. This generation consists of digital natives who grow up in a highly connected environment. They are expected to introduce new expectations for leadership and organizational structures. This paper investigates a theoretical framework based on leadership approaches. It examines how to best accommodate Generation Alpha's workplace needs. This theoretical study is based on contemporary literature and generational analysis. The study offers insights into the leadership and organizational strategies that are important for supporting engagement, productivity, and innovation in the changing work environment.*

Keywords: *Generation Alpha, future workforce, leadership, workplace innovation, theoretical framework*

INTRODUCTION

The idea of generational shifts in the workforce has been a subject of academic and corporate discussion for decades (Delulis & Saylor 2021, p. 2). This paper takes a theoretical approach and examine the evolving leadership expectations. These are influenced by the emergence of Generation Alpha. Each generation develops unique characteristics shaped by technological advancements, socioeconomic conditions, and cultural changes. The rise of Generation Alpha, born between 2010 and 2024, represents an important transformation in workforce dynamics and expectations (Kohli & Arora 2024, pp. 2–3). This generation is the first to be raised entirely in a digital world. Their constant exposure to artificial intelligence, automation, and hyper-connectivity sets them fundamentally different from previous generations (Kohli & Arora 2024, p. 7). Research indicates that Generation Alpha will be the most technologically literate workforce to date (Jaiswal 2023, n.pag.). From an early age, they have engaged with intelligent systems, virtual environments, and data-driven decision-making (Kohli & Arora 2024, p. 7). This early exposure to technology shapes Generation Alpha's learning preferences and important impacts. These are cognitive development, problem-solving skills, and expectations for leadership and workplace environments (Kohli & Arora 2024, p. 7; Höfrová 2024, n.pag.). To adapt to this generational shift, organizational must critically rethink conventional hierarchical structures. Additionally, they must adopt agile, tech-driven, and personalized work models. These changes meet the expectations of the future workforce (Jaiswal 2023, n.pag.). A defining characteristic of Generation Alpha is their reduced attention span and preference for on-demand, interactive, and highly immersive content (Kohli & Arora 2024, p. 9). This behavioral shift needs a fundamental transformation in organizational communication strategies, training methodologies, and leadership approaches (Jaiswal 2023, n.pag.). The new and modern workplace must evolve from traditional long-form content and rigid corporate policies to a dynamic, real-time engagement models. These models leverage AI-driven insights to optimize performance and learning experiences. These are customized by individuals' needs (Claassen et al. 2021, p. 3; Tigre et al. 2022, pp. 40–41). Generation Alpha is expected to prioritize sustainability, ethical leadership, and corporate social responsibility. Previous generations often viewed environmental responsibility and ethics as external factors. This new generation will integrate environmental and ethical considerations into their professional decision-making (Jaiswal 2023, n.pag.; Kohli & Arora 2024, pp. 7–8). Companies that ignore green initiatives, diversity policies, and transparent governance will struggle to attract and retain top talent (Jaiswal 2023, n.pag.; Chang 2021, p. 13). Leadership theories must evolve to fit the distinct cognitive, technological, and social characteristics of this generation (Jaiswal 2023, n.pag.; Bass & Riggio 2006, p. XI). Traditional leadership models with rigid hierarchies

and authoritative decision-making will likely fail to effectively motivate Generation Alpha (Bass & Riggio 2006, pp. 224–225). Organizations must adopt transformational leadership to foster innovation and purpose-driven work. Servant leadership emphasizes empathy and collaboration. Adaptive leadership highlights technological adaptability and learning agility (Bass & Riggio 2006, pp. 224–226). This paper combines existing research, industry insights, and theoretical frameworks. It provides a clear analysis of the leadership styles essential for integrating Generation Alpha into the workforce. This paper seeks to provide a foundation for businesses and policymakers to navigate this generational shift successfully (Jaiswal 2023, n.pag.). The discussion will center on key themes such as digital workspaces, flexible work models, continuous learning, and sustainability. Additionally, this paper offers a comprehensive framework for future leadership and workforce development (Claassen et al. 2021, p. 2).

Characteristics of Generation Alpha

Generation Alpha differs from previous generations due to its deep connection with technology, education, and evolving social values (WDR Zukunftsreport 2024, p. 6). These characteristics influence their workplace expectations and behaviors:

- **Digital natives and hyper-connectivity:** Generation Alpha grows in an AI-driven world. They are the first to experience digital full digital integration from early childhood (WDR Zukunftsreport 2021, p. 6). They expect seamless interactions with AI and automation in all areas of life. This makes AI-powered collaboration tools and virtual environments important in workplaces. These tools play a key role in their engagement (Beule & Zauner 2022, p. 161).
- **Personalized learning and adaptability:** Generation Alpha benefits from smart learning platforms and AI-powered educational tools. They value personal career growth and skill building (Bozak 2021, p. 119). Organizations need to move from static training programs to flexible, real-time learning systems. **This approach is important** to sustaining and developing this workforce (Jaiswal 2023, n.pag.).
- **Multitasking and shortened attention spans:** Generation Alpha cognitive processing is shaped by constant exposure to fast digital content. Research shows they prefer short, interactive engagement over traditional, long-form communication (Bonchiş 2022, pp. 124–132). This requires a shift to flexible, modular work structures. Organizations must focus goal-driven performance metrics instead of fixed time allocations (Höfrová et al. 2024, n.pag.).
- **Ethical and socially conscious workforce:** Generation Alpha views environmental and social responsibility as a natural part of their work (Kring et al. 2024, pp. 30–31). They expect organizations to align with environmental-social-governance principles. Businesses that prioritize ethical practices and environmental impact will have a stronger influence on their employment choices and retention (Kring et al. 2024, pp. 30–31).
- **Technology-dependent yet socially fragmented:** Generation Alpha is highly skilled in AI and automation. There are concerns existing about their interpersonal skills and emotional intelligence (Druguş 2022, pp. 1, 6–7). They are fully connected but engage less in face-to-face interactions. Despite digital connectivity, this increases the risk of loneliness (Beule & Zauner 2022, p. 161).
- **Comfort with AI and automation:** Generation Alpha expects automation to handle routine tasks. They do not need to adapt to digital. This enables them to focus on creativity, problem-solving, and strategic roles. Companies must change from traditional control structures to AI-enhanced, dynamic decision-making models (Jaiswal 2023, n.pag.).
- **Entrepreneurial and autonomous mindset:** Generation Alpha is influenced by digital content creation, freelancing platforms, and online business opportunities. This promotes adopting a gig-economy mindset (Ziatdinov & Cilliers 2021, 5–6).

Companies must adapt their Human Resources strategies to support flexible work models. This includes short-term and high-impact projects instead of traditional career paths (Jaiswal 2023, n.pag.). To attract and keep this workforce, organizations must undergo structural, technological, and cultural adaptations. Leadership paradigms must shift toward adaptive, AI-enhanced models, and focusing on clear values. The

next section explores how leadership theories must evolve to fit these generational traits.

Theoretical leadership approaches for Generation Alpha

The leadership approaches for Generation Alpha must differ from those used for previous generations. They need to be adapted to their unique skills and expectations. Generation Alpha is digitally fluent, adaptable and values autonomy. They will thrive under leadership that promotes flexibility, ethics, and technological integration. Several important theoretical leadership methods will be important.

Hierarchical leadership and its limitations

Traditional hierarchical leadership models rely on top-down decision-making and clear authority structures. They have proven effective, in controlled corporate environments (Bass & Riggio 2006, p. 108). These structures create well-defined chains of command, ensuring stability and efficiency. This makes it particularly suitable for industries that require strict compliance and structured workflows (Coddling & Goldberg 2024, pp. 16–17). Studies suggest that this model may be less effective for Generation Alpha. This generation prefers team-oriented and adaptable work environments (Jaiswal 2023, n.pag.). Research suggests that hierarchical leadership models often fail to engage younger employees. Younger employees prioritize autonomy, rapid feedback loops, and purpose-driven work (DeJuliis & Saylor 2021, p. 4). This shift challenges traditional leadership norms. It forces organizations to restructure their frameworks. This fosters innovation, inclusivity, and collaboration (Coddling & Goldberg 2024, p. 35). Hierarchical leadership can hamper innovation and creativity by restricting communication between employees to management. It limits employee-driven problem-solving. Further, it reduces opportunities for new ideas- problem-solving (Coddling & Goldberg 2024, pp. 18–19). Decision-making is concentrated at the top. Employees at lower levels may feel disempowered and hesitant to share new ideas. Organizations struggle to adapt quickly to market changes and technological advancements (Coddling & Goldberg 2024, pp. 18–19). Hierarchical leadership preserves its value in highly regulated sectors. Organizations must select decentralized, participatory frameworks to align with Generation Alpha's demands and collaborative innovation (Bass & Riggio 2006, p. 108; Jaiswal 2023, n.pag.). Companies that do not adapt their leadership strategies may struggle with employee retention. This can also lead to a higher risk of reduced employee retention, lower productivity, and limited innovation capacity (Yukl & Mahsud 2010, pp. 84–85). To maintain a competitive edge, organizations should adopt hybrid leadership models. These can balance the structure of hierarchical leadership with the flexibility of participatory and flexible leadership approaches (Yukl & Mahsud 2010, pp. 87–88).

Adaptive leadership for a dynamic workforce

Adaptive leadership provides a flexible and responsive framework. This is well-suited for the unpredictable nature of modern work environments (Yukl & Mahsud 2010, pp. 80–86). It does not rely on strict authority structures and top-down decision-making. Instead, it helps organizations respond flexibly to change. It also fosters a culture of continuous innovation (Yukl & Mahsud 2010, pp. 81–87). This leadership model prioritizes the following:

- Promoting a culture of lifelong learning and quick skill adaption. This helps organization keep up with evolving technological landscapes (Yukl & Mahsud 2010, pp. 85–89).
- Encouraging employees to develop solutions through experimentation. This fosters agility and resilience (Yukl & Mahsud 2010, pp. 85–89).
- Facilitating a cross-functional teamwork. This enables teams to tackle challenges in real-time (Yukl & Mahsud 2010, pp. 85–88).

Recent studies highlight that adaptive leadership goes beyond reacting to change. It fosters a proactive learning environment. This strengthens employees' ability to navigate uncertainty (Naim 2024, pp. 2099–2105). Adaptive leadership integrates emotional intelligence, psychological dynamics, and inclusive leadership strategies. This supports long-term organizational success (Yukl & Mahsud 2010, pp. 88–90; Naim 2024, pp. 2099–2102; Bass & Riggio 2006, pp. 173–175). Leaders must balance stability with the need of flexibility. Organizations can only thrive in volatile environments by adopting hybrid leadership

models. These models combine structured decision-making with collaborative and responsive leadership approaches (Naim 2024, p. 2095; Yukl & Mahsud 2010, pp. 81–84). Companies can use AI-enhanced structures, and continuous learning to build a strong workforce. This helps employees adapt flexible and drive long-term innovation (Tigre et al. 2023, p. 60; Claassen et al. 2021, p. 2; Naim 2024, p. 2094–2095). Generation Alpha grows up in AI-driven and rapidly evolving digital environments. Adaptive leadership gives them the flexibility to handle uncertainty. It keeps them highly engaged (Höfrová et al. 2024, n.pag.; Jaiswal 2023, n.pag.). Traditional leadership models rely on strict authority and fixed decision-making. These are less effective in engaging younger employees. Studies show that these models are less effective for younger employees. They prefer more independence, meaningful work, and quick feedback (Deluliis & Saylor 2021, p. 4–5; Claassen et al. 2021, p. 3). Adaptive leadership enables businesses to adjust to challenges in real time. This keeps organizations agile and strong in a digital-first economy (Naim 2024, pp. 2100–2101; Yukl & Mahsud 2010, pp. 87–88; Tigre et al. 2023, pp. 58–59). Companies can better manage generational shift by using when AI-enhanced, decentralized teams, and continuous learning initiatives. This helps them stay innovation in the long run (Naim 2024, p. 2102–2104; Claassen et al. 2021, p. 2; Tigre et al. 2023, pp. 58–59).

Transformational leadership: Inspiring innovation

Transformational leadership is highly effective in creating highly motivated and purpose-driven employees (Bass & Riggio 2006, p. 4; Givens 2008, pp. 9–10). This leadership style cultivates a dynamic and innovative work environment. This is emphasized by prioritizing key principles that align well with the expectations of Generation Alpha (Boerner et al. 2008, p. 1439; Nana et al. 2024, pp. 5301–5302). This emerging workforce is defined by technological fluency, a preference for autonomy, and a focus on meaningful work. Transformational leadership provides a valuable framework for managing and inspiring this new workforce (Grzegorzczuk et al. 2021, pp. 20–22; Kring et al. 2024, p. 27, Heyna & Fittkau 2021, pp. 6–8). The core elements of transformational leadership are:

1. **Charismatic influence:** Transformational leaders inspire employees with a clear and motivating vision that aligns with their intrinsic motivations. They build trust and commitment with the team. Leaders can create an environment where employees feel empowered to innovate and take initiative (Bass & Riggio 2006, pp. 44–46; Givens 2008, pp. 9–10).
2. **Intellectual stimulation:** Transformational leaders motivate employees to think critically, find new solutions, and challenge the status quo. Generation Alpha has grown up with fast-changing technological and digital learning. They enjoy problem-solving and constant innovation (Bass & Riggio 2006, pp. 7, 77–79; Boerner et al. 2009, p. 1439).
3. **Individualized consideration:** Transformational leaders mentor employees and provide tailored career development opportunities. This is important for Generation Alpha, who expect personalized learning experiences and flexible career paths. These are tailored to their evolving skill sets (Bass & Riggio 2006, pp. 7, 135–136).
4. **Inspirational motivation:** Leaders connect organizational goals with employees' values. This creates a sense of purpose and long-term commitment. Generation Alpha is more engaged in workplaces that prioritize corporate social responsibility and sustainability into their mission (Bass & Riggio 2006, p. 6; 131; Givens 2008, pp. 8–10).

Generation Alpha responds well to transformational leadership. This leadership style must complement their entrepreneurial mindset. This includes their demand for meaningful work, and preference for collaborative and flexible work environments (Höfrová et al. 2024, n.pag.; Bass & Riggio 2006, pp. 6–7; 135–136). Generation Alpha seeks active participation in decision-making. They expect organizations to encourage innovation rather than impose rigid corporate structures (Claassen et al. 2021, p. 3; Höfrová et al. 2024, n.pag.). Transformational leaders who offer mentorship programs are more likely to retain top talent. Supporting decentralized innovation also increases retention. These are more likely to be successful in retaining top talent from this generation (Bass & Riggio 2006, pp. 127–128, 135–136). The increasing integration of AI and automation in the workplace requires leadership approaches. It balances technological advancements with human-centric management (Ebojoh & Högberg 2024, pp. 16–17, 31–32). Generation

Alpha expects leaders to use digital transformation strategies. This approach selects employee engagement, continuous learning, and ethical decision-making (Claassen et al. 2021, p. 3; Kohli & Arora 2024, pp. 1–2). Companies that fail to adapt may struggle challenges such as lower retention rates, employee disengagement, and an inability. This foster creativity in a rapidly evolving economy (Bass & Riggio 2006, pp. 137–138; Antonopoulou et al. 2021, p. 406).

Servant leadership: Aligning with ethical and social values

Servant leadership focuses supporting employees. It emphasizes on their development, well-being, and personal growth (Ramírez-Herrero et al. 2024, pp. 11–20; Hartono 2024, p. n.pag). This leadership style empowers individuals by creating a sense of community. It shared decision-making, and promotes ethical responsibility (Coddington et al. 2023, p. 9; Hartono 2024, p. n.pag). The core elements of servant leadership:

- **Empathy and emotional intelligence:** Servant leaders actively listen to employees. They understand their concerns and create an inclusive workplace (Ebojoh & Högberg 2024, p. 26; Dörr et al. 2018, pp. 45–48).
- **Commitment to ethical decision-making:** Ethical responsibility is key part of servant leadership. Leaders act with integrity, transparency, and fairness (Liden et al. 2014, p. 10).
- **Employee empowerment and development:** This leadership style emphasizes mentorship and skill-building. It also promotes long-term employee engagement (Ebojoh & Högberg 2024, p. 26).
- **Community orientation:** Servant leaders focus on the well-being of the wider community. They ensure their organizations contribute positively to society and the workplace (Liden et al. 2014, p. 17).

Generation Alpha grew up in a connected and socially aware world. They are likely to react well to servant leadership. This leadership style matches their values of fairness, inclusion, and responsibility in business (Hartono 2024, n.pag.; Ramírez-Herrero et al. 2024, p. 10). Research shows that younger employees are more engaged when leaders show social responsibility. This promotes diversity, and enforce fair workplace policies (Ramírez-Herrero et al. 2024, p. 6). Organizations that apply servant leadership are more likely to attract and retain top talent from this generation. These practices help purpose-driven work environments (Liden et al. 2014, p. 17). Servant leadership influences more than just employee satisfaction. Companies that embrace this approach often experience higher commitment. This leads to greater innovation, and long-term sustainability (Liden et al. 2014, p. 27). Businesses are adapting to digitalization and changing workforce expectations. Servant leadership helps foster a culture of trust, collaboration, and ethical governance (Liden et al. 2014, p. 10). In conclusion, servant leadership is an effective model for managing Generation Alpha. It aligns organizational practices with their core values. This leadership approach emphasizes ethics, inclusivity, and employee empowerment. Companies can build an engaged workforce that thrives in a time of social and technological change (Liden et al. 2014, p. 14; Hartono 2024, n.pag).

The future of leadership: A hybrid model

Workforce dynamics changes rapidly. Leadership models must adapt to new advanced technologies and shifting generational expectations. Strong leadership ensures organizational resilience. This also drives sustained innovation (Ebojoh & Högberg 2024, pp. 25–26; Ebojoh 2023, pp. 3305–3306). Generation Alpha will change workplace engagement. Leadership must combine technological acumen with ethical and human-centered management (Kohli & Arora 2024, pp. 7–8; Astapenko et al., 2024, pp. 1–2). This study introduces a hybrid leadership framework that combines key theoretical models. It provides a foundation for leading the workforce of the future. A hybrid leadership model integrates established frameworks. This approach helps to address the complex needs of modern organizations (Ebojoh & Högberg 2024, p. 31; Ebojoh 2023, p. 3305). The integration of multiple leadership approaches enables businesses stay agile and uphold ethically standards. It promotes a culture of innovation (Ebojoh & Högberg 2024, p. 28–39; Ebojoh 2023, p. 3305). The three primary components of this hybrid method are:

- **Adaptive leadership:** Adaptive leadership offers a flexible framework. This supports the unpredictable nature of modern work environments (Yukl & Mahsud 2010, pp. 80–86). This leadership enables organizations to respond dynamically to change and adopt continuous innovation (Yukl & Mahsud 2010, pp. 81–87).

- **Transformational leadership:** Transformational leadership effectively engages highly motivated and purpose-driven employees (Bass & Riggio 2006, p. 4; Givens 2008, pp. 9–10). It achieves this by focusing principles that match with Generation Alpha's expectations. These include technological fluency, autonomy, and purpose-driven work. This approach creates a dynamic and innovative work environment (Boerner et al. 2009, p. 1439; Nana et al. 2024, pp. 5301–5302).
- **Servant leadership:** Servant leadership is a leadership style that underlines serving employees. It focuses on their development, well-being, and personal growth (Ramírez-Herrero et al. 2024, pp. 11–20, Hartono 2024, p. n.pag). This leadership empowers individuals by fostering a strong sense of community. It encourages shared decision-making and promotes ethical responsibility (Coddington et al. 2024, p. 9; Hartono 2024, n.pag.).

The growing use of artificial intelligence (AI), automation, and decentralized work structures requires leadership models that balance both technological and human complexities (Ebojoh & Högberg 2024, p. 31; Ebojoh 2023, p. 3305). A hybrid leadership framework is well-suited to this challenge. It combines transformational, adaptive, and servant leadership principles. This approach provides a multi-dimensional strategy for managing emerging workforce expectations (Ebojoh & Högberg 2024, p. 30). Leaders who effectively and efficiently implement this method must exhibit:

- **Technological fluency:** Leaders must have a deep understanding of AI-driven decision-making, data analytics, and digital collaboration tools. This optimizes workforce productivity while ensuring ethical oversight (Ebojoh & Högberg 2024, p. 26; Antonopoulou 2021, p. 406).
- **Emotional intelligence and ethical governance:** Generation Alpha prioritizes purpose-driven work and ethical transparency. Leaders must cultivate environments that highlight inclusivity, fairness, and accountability (Ebojoh & Högberg 2024, pp. 31–32; WDR Zukunftsreport 2021, p. 4).
- **Strategic agility:** Organizations must prepare for volatility and complexity. They should adopt leadership practices that focus problem-solving and continuous learning (Bürkle 2023, pp. 15–16; Unkrig 2020, pp. 1–3).

Traditional leadership development models are based on hierarchical and rigid management systems (Bass & Riggio 2006, pp. 224–225). These are insufficient for preparing future leaders to navigate the digital-first economy (Naim 2024, p. 2100–2101; Yukl & Mahsud 2010, pp. 87–88, Tigre et al. 2023, pp. 58–59). Leadership development programs must include key elements to prepare leaders with the skills required to manage Generation Alpha effectively (Kohli & Arora 2024, p. 10; Melchor et al. 2023, p. 42). Leadership development programs must incorporate:

- **Interdisciplinary learning and continuous education:** Organizations should prepare leaders for complex challenges by integrating technological literacy, behavioral sciences insights, and ethical leadership principles into their training programs (Ebojoh 2023, p. 3307; Antonopoulou 2021, p. 406).
- **Reverse mentorship and collaborative learning:** Encouraging knowledge exchange between experienced professionals and younger employees helps bridge generational gaps. It promotes innovative problem-solving approaches (Hoffmann 2018, pp. 158–160; Grzegorzczuk 2021, p. 16).
- **AI-driven simulations and scenario-based training:** By using advanced simulations, leaders can improve their decision-making skills. These simulations expose them to real-world challenges in controlled environments (Melchor et al. 2023, p. 41; Antonopoulou 2021, p. 426).

Critical discussion and future directions

Theoretical frameworks present valuable opportunities for successfully integrating Generation Alpha into the workforce (Kohli & Arora 2024, pp. 6–7). Several key challenges must be addressed to ensure a transition (Coddington et al. 2024, p. 7; Grzegorzczuk et al. 2021, pp. 11–12). These challenges include organizational structures, ethical considerations, intergenerational dynamics, and technological integration (Coddington et al. 2024, pp. 33–34; Ebojoh & Högberg 2024, p. 25). Addressing these complexities is essential for building a resilient and innovative workforce (Ebojoh & Högberg 2024, p. 29; Ebojoh 2023, pp. 3306–3307). This promotes a future of work that is innovative, and resilient (Ebojoh & Högberg 2024, p. 29; Coddington et al. 2024, pp. 32–33).

A major challenge is existing organizational structures must be prepared to meet Generation Alpha's

unique expectations (Kohli & Arora 2024, p. 6; Melchor 2023, p. 42). Many organizations still rely on hierarchical leadership. These are defined by top-down decision-making and rigid authority structures (Coddington et al. 2023, p. 3). Traditional leadership models may clash with Generation Alpha's preference for participatory and decentralized leadership. This generation values collaboration, autonomy, and rapid feedback loops (Coddington et al. 2023, p. 9; Kohli & Arora 2024, p. 9). To meet these expectations, organizations must undergo major cultural and structural changes. Agile work models, cross-functional teams, and flat hierarchies will become an increasingly important (Coddington et al. 2023, pp. 9–10). Leadership development programs should focus on fostering adaptive, transformational, and servant leadership qualities. This aligns with Generation Alpha's values of ethical governance, technological integration, and continuous learning (Waddell 2006, p. 2; Kohli & Arora 2024, pp. 7–8). The growing dependence on artificial intelligence and automation in the workplace presents a range of ethical concerns (Melchor 2023, pp. 41–42; Ebojoh & Högberg, 2024, p. 24). These concerns include employment stability, data privacy, algorithmic bias and the risk of dehumanization processes (Grzegorzczak 2021, p. 19). Generation Alpha is expected to be highly comfortable with AI-driven environments. The ethical implications of these technologies must be carefully managed (Melchor et al. 2023, p. 42; Kohli & Arora 2024, p. 7). Organizations must ensure transparency in AI applications, implement data privacy protections and address algorithmic biases. Ethical leadership models that prioritize fairness, accountability, and social responsibility are essential for the workforce engagement and preserving organizational integrity (Melchor et al. 2023, p. 42; Chang et al. 2021, p. 2). Generation Alpha will enter a diverse workforce with multiple generations. These include Baby Boomers, Generation X, Millennials, and Generation Z (Jaiswal 2023, n.pag.; Kohli & Arora 2024, p. 1; Höfrová 2024, n.pag.). Each generation brings unique values, communication styles and technological skills. This can lead to tensions and misunderstandings (DeJuliis & Saylor 2021, p. 2; Ebojoh & Högberg 2024, p. 25). Managing intergenerational dynamics requires inclusive communication strategies. Leaders must promote mutual respect and encourage knowledge that is shared across age groups (Ebojoh & Högberg 2024, pp. 20–22). Reverse mentorship programs can help bridge generational gaps. Younger employees share technological insights with senior staff that can foster a collaborative innovation (Bozak 2021, p. 122). Generation Alpha's technological fluency creates many opportunities for innovation. It also raises concerns about social fragmentation and emotional intelligence. Growing up in hyper-connected digital environments may reduce face-to-face interactions. This can lead to weakened interpersonal skills (Höfrová et al. 2024, n.pag.; Kohli & Arora 2024, p. 7). Leaders must balance technology use to improve productivity. Work environments should prioritize emotional intelligence, empathy, and community-building (Ebojoh & Högberg 2024, pp. 24–26). Servant leadership should focus on ethical decision-making, employee empowerment, and social responsibility. This approach can help achieve the right balance (Chang 2021, pp. 2–4). The hybrid leadership model combines adaptive, transformational, and servant leadership. This approach addresses the evolving expectations of Generation Alpha. Implementing this model presents several challenges. It requires a careful balance between flexibility and structure. This balance is not always practical for organizations (Krajčík 2023, p. 12; Schwehn 2025, p. 766). Hybrid leadership demands that leaders integrate multiple leadership styles. They must transition between transformational inspiration, adaptive flexibility, and servant leadership principles (Schwehn 2025, p. 763; Foulkrod & Lin 2024, pp. 80–81). Balancing these different approaches can be difficult:

- Leaders may struggle to decide when to use adaptive decision-making and when a more structured leadership approach is necessary (Foulkrod & Lin 2024, pp. 80–81; Schwehn 2025, p. 766).
- Not all managers possess the adaptability required to shift between leadership styles (Foulkrod & Lin 2024, p. 86; Schwehn 2025, p. 770).
- Organizations with rigid hierarchical structures may find it difficult to achieve the level of agility that hybrid leadership requires (Schwehn 2025, p. 766; Krajčík 2023, p. 12).

Without a clear framework, the hybrid model can become inconsistencies. This may lead to employee confusion. It reduces overall organizational effectiveness (Schwehn et al. 2025, p. 766; Krajčík et al. 2023, p. 13). Each element of the hybrid leadership model serves a unique purpose:

- **Adaptive leadership:** This approach focuses on flexibility and responsiveness (Foulkrod & Lin 2024, p. 80).

- **Transformational leadership:** This approach emphasizes vision, motivation, and innovation (Krajčík et al. 2023, p. 12).
- **Servant leadership:** This approach centers on empathy, ethical responsibility, and employee well-being (Foulkrod & Lin 2024, pp. 80–81; Ramírez-Herrero et al. 2024, pp. 11–12).

These approaches complement each other in theory. They might create contradictions in practice. For example:

- Employees used to transformational leadership might expect clear vision and strategy, while adaptive leadership focuses on flexibility and quick decision-making. This leadership encourages decision-making and quick experimentation (Ramírez-Herrero et al. 2024, pp. 11–12; Foulkrod & Lin 2024, pp. 80–81).
- Too much on servant leadership increases employee expectations for personal attention. This can reduce efficiency in fast-paced environments (Foulkrod & Lin 2024, pp. 80–81).
- Leaders may feel pressured to be both authoritative and participatory. This can cause inconsistencies in decision-making processes (Schwehn et al. 2025, p. 770).

Without a clear strategy, hybrid leadership can create unrealistic expectations for leaders and employees (Schwehn et al. 2025, p. 764). Hybrid leadership requires important investment in leadership development. It also needs digital systems improvements, and ongoing training employees (Schwehn et al. 2025, p. 770). Organizations must:

- Organization must train managers to develop the skills needed to navigate the complexities of a hybrid model (Schwehn et al. 2025, p. 764).
- Companies should promote a culture of teamwork and flexibility. Continuous engagement strategies and change management initiatives are essential (Krajčík et al. 2023, p. 12).
- Businesses should use advanced AI tools to support make quick decision-making and manage performance (Krajčík et al. 2023, pp. 12–13).

Small and medium-sized enterprises may struggle to allocate resources for hybrid leadership initiatives. Large corporations with greater financial and technological capabilities are better equipped to implement this model (Schwehn et al. 2025, p. 770). Hybrid leadership is designed to meet Generation Alpha's expectations. It must address the account for the needs of a multigenerational workforce (Ramírez-Herrero et al. 2024, pp. 4; 9).

- Baby Boomers and Generation X prefer structured leadership with clear chains of command (Ramírez-Herrero et al. 2024, pp. 6–7).
- Millennials and Generation Z favor transformational and adaptive leadership. They still value guidance and mentorship (Ramírez-Herrero et al. 2024, pp. 7–9, 12–13).
- Generation Alpha emphasizes self-directed learning, technology-driven collaboration, and a strong focus on ethical leadership (Ramírez-Herrero et al. 2024, pp. 8–9).

Managing diverse expectations within a hybrid framework can lead to tensions. Younger employees prefer digital and flexible work environments, while older employees resist rapid organizational changes (Ramírez-Herrero et al. 2024, pp. 14–15). Hybrid leadership is still an emerging concept. Its long-term effects on workforce engagement, productivity, and organizational stability are insufficiently documented (Schwehn et al. 2025, pp. 763, 770). Most research focuses on individual leadership models, such as adaptive or transformational leadership, rather than their integration (Schwehn et al. 2025, p. 762). This raises several concerns, including:

- The long-term viability of hybrid leadership strategies over extended periods remains uncertain (Schwehn et al. 2025, p. 764).
- The impact of hybrid on leadership effectiveness is unclear. Especially unclear in industries that emphasize stability and compliance (Schwehn et al. 2025, p. 763).
- Employees may become disengaged if leadership transitions are not effectively communicated and managed (Schwehn et al. 2025, p. 763, 770).

Further research is essential to assess the impact of hybrid leadership across different industries and organizational structures (Schwehn et al. 2025, p. 763, 765).

Future research directions

Theoretical approaches and current literature underline key areas for integrating Generation Alpha into the workforce:

1. **Longitudinal studies on leadership adaptations:** Empirical research is needed to evaluate adaptive, transformational, and servant leadership across industries. These studies will offer key insights best practices for managing Generation Alpha. They should evaluate the long-term impact on engagement, productivity, and organizational resilience.
2. **Intergenerational collaboration models:** Research is needed on innovative approaches like reverse mentorship and cross-generational teams. These models can strengthen workplace cohesion and improve knowledge sharing. Studies should evaluate their impact on organizational innovation and employee satisfaction.
3. **Ethical AI integration:** Research must explore the ethical impact of AI and automation in the workplace. It should focus on reducing algorithmic bias and ensuring data privacy. They should also examine how to balance technological efficiency with human-centric values.
4. **Workplace design and digital well-being:** Research should examine how workplace design and digital well-being initiatives that impact Generation Alpha. Studies should focus on mental health, social connections, and work-life balance. Flexible work models, virtual collaboration tools, and wellness programs play a key role in fostering a healthy and engaged workforce.
5. **Impact of sustainability and corporate social responsibility (CSR):** Generation Alpha values sustainability and ethical leadership. Organizations can align with environmental and social values. Future research should examine how initiatives influence talent retention and organizational performance.

CONCLUSION

The integration of Generation Alpha into the workforce brings major changes to workplace culture, leadership expectations and workplace structures. This generation has grown up as digital natives in highly connected world. Their experiences have shaped unique values, strong technological skills, and a preference for ethical, purpose-driven work. Organization must adopt flexible, adaptive, and human-centric leadership models to unlock the full potential of the rising generation. Traditional hierarchical structures trust on authority and top-down decision-making. Those approaches are becoming less effective in connecting with Generation Alpha. Adaptive leadership promotes continuous learning and innovation. Transformational leadership fosters purpose and creativity. Servant leadership aligns with Generation Alpha's emphasis on ethical governance and social responsibility. This shift brings challenges such as intergenerational differences and the ethical concerns related to AI. The need for new technological integration adds to the complexity of this shift. Hybrid leadership is not a universal solution. It has the potential to address the needs of Generation Alpha. Implementing hybrid leadership presents several challenges. These challenges include complexity, different leadership expectations, limited resources, generational differences. A lack of research data further complicates implementation. Organizations need clear guidelines to effectively apply hybrid leadership. Organization must invest in leadership development. They should create structured systems to balance flexibility with stability. Future research should examine how hybrid leadership evolves over time. It should assess its impact on workforce dynamics in an AI-driven economy. Organizations must address these challenges through inclusive communication. They must ensure ethical AI practices. They need to balance technological advancements with human-centric leadership. Future research should examine the long-term effects of leadership changes. It should also explore the ethical use of AI. Sustainability plays an important key role in workforce engagement. Businesses and policymakers must create resilient and innovative workplaces. These workplaces should be inclusive and align with Generation Alpha. Hybrid leadership is essential for managing this generational shift. It combines adaptive, transformational, and servant leadership. This approach supports long-term organizational growth and innovation.

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ПОКОЛЕНИЕ АЛФА И БЪДЕЩАТА РАБОТНА СИЛА: ТЕОРЕТИЧНА ПЕРСПЕКТИВА КЪМ ОЧАКВАНИЯТА ЗА ЛИДЕРСТВО

Резюме: Нарастването на новото поколение Алфа, родените между 2010 и 2024 г., ще окаже съществено влияние върху динамиката на работната сила. Това поколение се състои от дигитални аборигени, които израстват в силно свързана среда. Очаква се те да въведат нови очаквания към лидерството и организационните структури. В настоящата статия се изследва теоретична рамка, основана на подходите към лидерството. В нея се изследва как най-добре да се адаптират нуждите на работното място на поколението Алфа. Това теоретично изследване се основава на съвременна литература и анализ на поколенията. Изследването предлага прозрения за лидерските и организационните стратегии, които са важни за подпомагане на ангажираността, производителността и иновациите в променящата се работна среда.

Ключови думи: поколение Алфа, бъдеща работна сила, лидерство, иновации на работното място, теоретична рамка

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

**CODE OF CONDUCT AS A TYPE OF COMPLIANCE REGULATION ILLUSTRATED
BY THE GUIDELINES OF DEUTSCHE VERMÖGENSBERATUNG AG**

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Abstract: *The English term ‘compliance’ is also used in German to describe a department that ensures adherence to rules and regulations within a company. In many cases, ‘compliance’ is understood as a guideline for behavioural regulations and is also intended to help hierarchical structures to adhere to legal regulations imposed outside the company. By putting such guidelines in writing, every employee can be reached and informed. The easy duplicability of a transcript is also helpful in making new colleagues familiar with existing rules. Such a document is referred to as Code of Conduct. The current publication illustrates compliance regulations based on two companies that (have to) deal with ‘compliance’ responsibilities differently. One of these is entitled ‘Mission Statement of Deutsche Vermögensberatung’ and is intended to illustrate the vision of the founders and members of the Executive Board to the partners of the company and serve as a guide. However, companies with a classic hierarchical structure are expected to provide more than just a Mission Statement, since it does not represent a direct Code of Conduct. An example of such type of company is Generali Group, which a co-operation partner of Deutsche Vermögensberatung AG (DVAG for short) and has published its own clear code of conduct. These two variants are compared and discussed as to why they (should) be handled differently.*

Keywords: *code of conduct, Deutsche Vermögensberatung AG, mission statement, compliance, Generali Group*

INTRODUCTION

When we talk about *compliance* in a company, we usually refer to laws and regulations that are an essential guarantee for the company’s adherence to legal requirements and its commitment to conveying these rules to its employees. However, as there are regular changes to be observed at the legal level, it is not possible for a company to regularly monitor and observe compliance and update it in the event of new legislation. For this reason, certain guidelines are used to communicate new regulations to the lower hierarchical structures; Gabler Wirtschaftslexikon defines such communicating practices as ‘voluntary self-commitment’ (Lin-Hi 2018).

This means that a separate department within a company is usually required to enforce and monitor compliance. Duplicability is ensured in that agreements are communicated unambiguously in writing. Such documents then constitute a so called Code of Conduct. The examples of Deutsche Vermögensberatung AG (DVAG for short) and Generali Group illustrate the difference between a Mission Statement and a Code of Conduct. As an exemplary illustration, the transcripts on dealing with colleagues are also compared.

The theoretical foundation in the next chapter ensures a basic level of knowledge so that the company examples that follows can be properly understood.

A definition of the terms ‘code of conduct’ and ‘compliance’, as well as an introduction to the company itself, should provide the readers with a basic understanding and enable them to comprehend the connections in the methodology.

The two transcripts from the sample companies then set the pace for the methodology.

Like any compact publication, this one can only highlight aspects and does not provide a fully comprehensive evaluation. For this reason, the final chapter provides not only a summary but also an outlook for the author’s forthcoming dissertation that will examine this area in greater depth.

DEFINITION OF ‘COMPLIANCE’

‘Compliance’ is “the claim to absolute conformity with regulations and strict adherence to laws and internal guidelines” (Carlesso 2024).

Should a company department be responsible for compliance with regulations, it is referred to as ‘compliance management’. This type of management supports the integration of regulations and laws into the company’s structure and in time communicates them to all employees and ensures that they are observed. The existence of compliance management within a company minimizes criminal and civil law risks and enhances the possibility of new contracts by public clients, which eventually strengthens the company’s competitive reputation. In addition, rules of conduct can create a more comfortable working environment, whereas organizational arrangements are set up to “monitor, evaluate and take appropriate action” (KMPG AG 2024).

DEFINITION OF ‘CODE OF CONDUCT’

To comply with legal requirements and to be able to replicate these in the lower hierarchical structures, many companies make use of the written form of all regulations in the form of a code of conduct. This is made publicly available to all employees and explicitly referred to. It is intended both to provide employees with specific guidelines and to prevent undesirable activities and changes. Business partners and suppliers are also informed about the code of conduct of a company to guarantee smooth process chains.

Typical issues regulated by a code of conduct are:

- collegial interaction
- dealing with gifts and invitations
- dealing with information (data protection and internal company secrets)
- discrimination prevention
- ecological responsibility
- working conditions and minimum requirements.

The above lead to the following advantages as a result:

- stronger identification with the company as there is no discrimination and ethical values are recognized internationally
- improved external perception through the disclosure of the code of conduct on the homepage
- legally compliant process chains that prevent violations and penalties
- clear communication about breaches of the regulations takes place right from the start.

Should an employee violate the code of conduct, their penalty is imposed by the employer and not by the law, since disciplinary sanctions can be better understood by the employee and implemented by the employer, without having to expect consequences from a work union or the media (Hetzel 2024).

‘DEUTSCHE VERMÖGENSBERATUNG AG’ AND ITS MISSION STATEMENT

The company named in the acronym ‘DVAG’ describes in its mission statement the overarching version which partners should familiarize themselves with.

The fact that DVAG works with self-employed sales agents and thus promotes, among others, self-employed individuals, is not described in more detail below, but is nonetheless considered important since the self-employment of the investment advisors does not require a code of conduct on the part of the company. No sanctions are imposed, as the sales representatives set up their own sole proprietorship by registering their business.

It is therefore interesting to note that although no code of conduct is drawn up, all sales representatives are nevertheless orientated towards a common vision, clarified with the help of a written mission statement:

Everyone working for DVAG is voluntarily guided by the following mission statement:

DVAG’s three values are ‘performance-orientated, human, strong’, defined in the company’s transcripts and illustrated by a diagram. They reflect the vision of the company’s founder, Prof. Dr. Reinfried Pohl, who described it as follows: “In Germany, the concept of investment advice should be inextricably linked with Deutsche Vermögensberatung and the job of investment advisor should be brought closer to that of a general practitioner in the eyes of the public.” (DVAG homepage 2025).

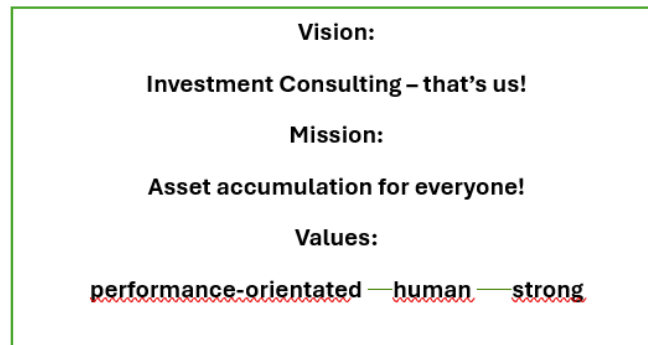


Fig. 1. Vision and model of 'Deutsche Vermögensberatung AG' (2024)

The value 'performance-orientated' describes the mission of small and medium-sized companies as well as private households to fulfil their individual financial wishes and goals with the help of wealth accumulation and protection through concept advice (DVAG 2018, 18). The value of 'human' is understood in two ways. Firstly, it refers to the principle of equal treatment of clients, regardless of their assets (DVAG 2018, 23). Secondly, 'human' also refers to internal cooperation: in this respect, DVAG addresses career opportunities that should be available to every person, irrespective of their gender or origin.

To emphasize the importance of a family community, the Group encourages exchange among colleagues and due to the second-generation management is called a 'family business' (DVAG 2018, 22). The value 'strong' refers to the already wide range of customers and the cooperation with successful financial institutions (DVAG 2024, 26). DVAG was the first financial services provider to position itself on the market with a so-called all-finance strategy and is still the strongest in the industry in terms of sales today, with around 18,500 advisors and commission income of up to €2.24 billion (cash-online 2023).

The Deutsche Vermögensberatung AG Mission Statement can be ordered in the internal shop and is presented to every new partner in a welcome box as soon as the commercial agency or employment contract is signed. It is intended to give career changers and young partners in particular a sense of belonging and to maintain respectability.

DVAG'S COOPERATION PARTNER *GENERALI GROUP* AND THE INFLUENCE OF ITS 'CODE OF CONDUCT' ON SALES REPRESENTATIVES

Owing to the long-time partnership between DVAG and the Generali Group, independent financial advisors work together with the insurance group. The traditional hierarchical structure of the company requires the employment of a large number of staff. There is also a works council and a code of conduct, which is publicly accessible (Generali Group 2024).

The present publication is limited to the sub-chapter 'Work, environment, diversity, equity and inclusion' of the third chapter 'Rules of Conduct'. The Group makes it clear that any kind of harassment and exclusion of employees is prohibited (Generali 2024, p. 11) and that every employee has the responsibility to treat colleagues kindly and work in cooperation. The definition of the company's code of conduct also included the sanctions that result from non-compliance with the guidelines. The example refers to serious consequences and how a witness who experiences or observes a violation should behave (Generali 2024, p. 12). A serious offence can lead to criminal prosecution (Generali 2024, p. 8).

Just as DVAG expects compliance with its mission statement, the Generali Group expects compliance with its code of conduct.

Sales representatives that cooperate with Generali Group are also affected by its code of conduct and, if necessary, receive sanctions. The Code points out right at the beginning that third parties who cooperate with the Group are also bound by its code of conduct (Generali 2024, p. 7).

RESULTS

In summary, it is important, especially for large companies, to establish separate departments for monitoring and compliance with regulations. The company's internal mission statement is made public on the company's website and in cases where a code of conduct is written down, it is also made accessible to the public.

On the one hand, a code of conduct can give the target group a notion about the way a company operates as well as attract new employees who share a similar or even identical work philosophy. The large number of legal requirements and guidelines, especially in the example of financial services, can necessitate the set-up of Intranet and subsequently a Cluster that can facilitate the understanding of the rules and guidelines for employees. In such a way, ignorance of the guidelines can also be avoided. Final questions can then be clarified with the help of a direct contact person within the formed departments.

CONCLUSION AND DISCUSSION

The present analysis describes the difference between a Mission Statement and a Code of Conduct of two large companies and therefore cannot provide an overall insight into the working practices of the Deutsche Vermögensberatung AG Company Group and the Generali Group. For this reason, the analysis of the companies is continued and deepened in a subsequent dissertation. The current publication is not intended to provide assistance in establishing respective codes of conduct or mission statements of companies but is purely for informational purposes. As a final point it can be argued that the DVAG mission statement is a representation of the company's expectations; in truth, however, the values formulated in it should be the guidelines of ethical behaviour of each member of the company. The same applies to the subchapter of the Generali Group AG code of conduct.

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КОДЕКСЪТ ЗА ПОВЕДЕНИЕ КАТО ВИД РЕГУЛИРАНЕ НА СЪОТВЕТСТВИЕТО, ИЛЮСТРИРАН ОТ НАСОКИТЕ НА DEUTSCHE VERMÖGENSBERATUNG AG

Резюме: Английският термин „compliance“ се използва и на немски език, за да опише отдела, който следи за спазването на правилата и разпоредбите в дадена компания. В много случаи „compliance“ се разбира като насока за поведенчески регулации, а също така има за цел да подпомогне йерархичните структури да спазват законовите разпоредби, наложени извън компанията. Чрез писменото представяне на такива насоки всеки служител може да бъде информиран. Лесната дублируемост на запис е полезна и за запознаване на новите колеги със съществуващите правила. Такъв документ

се нарича Кодекс за поведение. Настоящата публикация илюстрира правилата за съответствие въз основа на две компании, които (трябва да) се справят с отговорностите за „съответствие“ по различен начин. Едната от тях е озаглавена „Мисия на Deutsche Vermögensberatung“ и има за цел да илюстрира визията на основателите и членовете на Изпълнителния съвет пред партньорите на дружеството и да служи като ръководство. От дружествата с класическа йерархична структура обаче се очаква да предоставят нещо повече от „Представяне на мисията“, тъй като то не представлява пряко Кодекс за поведение. Пример за такъв тип компания е Generali Group, която е партньор за сътрудничество на Deutsche Vermögensberatung AG (накратко DVAG) и е публикувала свой собствен ясен кодекс на поведение. Тези два варианта са сравнени и обсъдени защо (трябва) да бъдат третираны по различен начин.

Ключови думи: кодекс на поведение, Deutsche Vermögensberatung AG, декларация за мисия, съответствие, Generali Group

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

THE CHALLENGES OF LEADERSHIP IN THE AGE OF LEADERSHIP 4.0

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Abstract: *The age of Leadership 4.0 has brought about major changes and challenges for leaders that are characterised by digitalisation, globalisation and the changing world of work. In the VUCA world, where technological competence requirements are constantly increasing, managers must learn to react quickly to unpredictable developments; in addition to this, the principles of New Work require a reorientation of traditional leadership approaches. The management of hybrid and digital teams is a particular challenge, as is maintaining a balance between autonomy and control. The focus of this publication is therefore specifically on the challenges that management is facing in the age of Leadership 4.0. Firstly, the underlying technical terms are explained in detail so that purposefully selected challenges may be further addressed. Leadership 4.0 requires a holistic change in the attitude and skills of managers. Only those who combine technological, social and strategic skills will be able to lead successfully in the dynamic and digitalised world of work.*

Keywords: *Leadership 4.0, VUCA world, new work, challenge, leadership culture*

INTRODUCTION

Today's world of work is undergoing considerable changes. Triggered by globalisation and digital transformation, corporate competitive pressure is significantly growing. Ongoing digitalisation has proved to be a driving factor in the constantly evolving competitive environment, making the need for constant innovation a major challenge (Hildebrandt, Landhäußer 2017, p. 595).

The number of innovative business models and new global competitors is constantly increasing, whereas the pillars that have historically been regarded as reliable, such as regulatory density, customer base and capital strength, can no longer be considered a given. The increasing use of artificial intelligence is also a driving factor. As a result of these circumstances and the dynamic requirements of the digital world of work, employee management is confronted with numerous challenges in the current age. In this context, the scientific concept of Leadership 4.0 has been established in response to the requirements of the Fourth Industrial Revolution. It addresses the challenges of leadership in the digital age and also takes into account the changing expectations of employees. In addition, new working models, such as hybrid and digital collaboration, are also taken into consideration (Hildebrandt, Landhäußer 2017, p. 617).

The following article examines more closely the problems associated with the implementation of Leadership 4.0 and shows how managers can operate successfully in a complex and dynamic working environment. The aim is to identify key challenges and point out possible solutions. Nevertheless, these are only briefly discussed for the purpose of the current study.

RESEARCH METHODOLOGY

This publication is based exclusively on literature sources that focus on the challenges of Leadership 4.0. The literature research includes existing sources and data from professional journals, specialised books, online articles and studies. Firstly, terms such as Leadership 4.0, VUCA world and New Work are clearly defined in order to ensure sufficient background knowledge. The emphasis then will be on a few selected issues which will be examined from different angles.

DEFINITION OF LEADERSHIP 4.0

The term Leadership 4.0 is used in the context of Industry 4.0 and implies the adaptation of leadership behaviour to the advancing digitalisation of the world of work. The underlying leadership paradigm therefore

responds to the requirements of the fourth industrial revolution, which is prompting a rethink of traditional leadership approaches through the use of artificial intelligence, automation and the internet. In contrast to the previous leadership models, Leadership 4.0 focuses on the integration of technology and people, so that digital expertise, agility and the ability to lead in a dynamic and networked working environment takes central stage. Technological transformation in this context is seen not only as a challenge, but also as an opportunity for innovation (Moskaliuk 2019, p. 13).

In addition to understanding and using technological know-how, characteristic features of Leadership 4.0 include the ability to adapt quickly to technological and organisational changes, the promotion of agile methods which to enable efficient response to changing market requirements, as well as the promotion of sustainability and long-term value creation. Another key component of Leadership 4.0 is the increased use of soft skills, i.e. emotional intelligence for effective communication and conflict resolution. Building empathy and resilience within a team helps to promote personal initiative and focuses on strengthening individual skills. To this end, flat hierarchies are typically used to promote collaboration within interdisciplinary and multicultural teams through transparent communication.

By combining these characteristics, Leadership 4.0 represents a dynamic and integrative approach that takes into account both technological and human aspects in order to ensure successful employee management despite the demands of digital transformation (Moskaliuk 2019, pp. 14–15).

INCREASED COMPETENCE REQUIREMENTS FOR MANAGERS

Leadership 4.0 takes into account not only technological but also cultural changes within an organisation, meaning that the integrative leadership style is faced with numerous challenges. The VUCA model describes the changes of our time, with the acronym VUCA expressing the features and difficulties of modern society and economic systems, which are defined by a high degree of dynamism and uncertainty. Thus, the framework model developed by the US military can be applied to the everyday lives of managers (Bendel 2021).

The term VUCA stands for Volatility, Uncertainty, Complexity and Ambiguity. Volatility refers to the rapid and unpredictable changes in markets caused by technological innovations, environmental conditions and market shifts (Moskaliuk 2019, p. 2).

Uncertainty, on the other hand, refers to the difficulty of predicting future developments, as contradictory or incomplete information makes planning and decision-making more difficult. This is triggered, for example, by uncertain political conditions and unclear future trends (Moskaliuk 2019, pp. 2–3).

Added to the above features is the emerging Complexity, as the networking of different factors leads to interrelationships and interactions that are difficult to understand. This is where global supply chains and digital ecosystems with many stakeholders come into play, making a comprehensive understanding and clear decision-making basis difficult (Moskaliuk 2019, p. 2).

Finally, Ambiguity stands for the scope for interpretation and the challenges of finding clear answers to ambivalent facts. Challenges are posed by different interpretations of the same trend as well as by contradictory signals in data (Moskaliuk 2019, p. 2).

To sum up, the VUCA world describes a reality that precisely identifies the challenges of the current age for which traditional approaches to problem solving and strategic planning are often inadequate, meaning that the leadership required as a result must be fundamentally redefined (Moskaliuk 2019, p. 3).

Another term that aptly outlines the complex requirements of the modern world of work is New Work. The concept is based on social and technological change and describes working models that are built on freedom, self-determination and meaningfulness for employees.

The core elements of New Work include freedom, self-realisation and, above all, finding meaning in one's occupation. New Work also reflects the importance of flexibility, considering working hours and location as important job factors, whereby working practices such as home office or remote work are no longer regarded an exception. Collaboration and employee participation are also closely linked to this, as flat hierarchies place a stronger focus on teamwork with employees also actively involved in the decision-making process. In general, the term New Work lays emphasis on meaning, the idea behind being that work should not only generate economic added value, but also be individually fulfilling, socially relevant and sustainable (Bergk, Rehn 2024, p. 342).

However, the implementation of the elements listed above poses some challenges depending on the respective industry and the existing corporate culture. For example, flexible working hours and home office options can hardly be implemented in skilled trades. There is no doubt that the people-centred approach defined by the term New Work offers a high degree of benefits and innovation, yet there are also problems resulting from it, as implementation depends on the needs and priorities of individual employees (Bergk, Rehn 2024, p. 343).

New Work and Leadership 4.0 are closely linked since the two tendencies both respond to the demands and changes of the modern world. New Work is a response to the demand for far-reaching social change. In addition to demographic change and technological development, this also includes the shortage of skilled labour and the general search for meaning among younger generations. Leadership 4.0, on the other hand, refers to the management style required for this, which responds accordingly to the conditions of the digitalised and networked world of work and therefore plays a key role in the successful implementation of New Work (Bergk, Rehn 2024, p. 342).

The topic of New Work emphasises the importance and necessity of an adapted leadership culture. The challenges of leadership in the age of Leadership 4.0 are discussed below.

MANAGEMENT OF VIRTUAL AND HYBRID TEAMS

Managing virtual and hybrid teams poses a particular challenge in the context of Leadership 4.0, as traditional leadership approaches reach their limits in a digitalised and decentralised working environment. One of the key challenges here is the loss of physical proximity since virtual teams are working groups whose members are geographically separated from each other and rely on technology to be able to work together. Hybrid teams consist of employees who work both on site in an office and remotely, i.e. from home or at another location. Hybrid teams are a combination of traditional office teams and virtual teams. This is an increasingly common model, which has gained great popularity due to digitalisation and the COVID-19 pandemic. To ensure long-term successful leadership despite localised separation, leaders need to take targeted measures so that social bonds are consciously strengthened. This is possible, for example, through transparent communication and digital tools for collaboration (Basel, Spörri 2024, pp. 55–56).

Closely related to this is the buildup of motivation and commitment on the part of employees, as they are potentially isolated when working virtually. In order to prevent being overwhelmed by the multitude of tools, technical disruptions and digital exhaustion, it is advisable for managers to promote digital skills in a targeted manner and to implement the technological infrastructure effectively (Mütze-Niewöhner et al. 2021, p. 14). However, Leadership 4.0 also requires managers to be more adaptable and self-reflective when it comes to leading virtual and hybrid teams. Standard competences such as decision-making skills are taken for granted. Other competences, such as flexibility, are required in order to be able to respond professionally to unforeseen challenges and changing requirements in the area of agile leadership. This illustrates a transformation of the traditional leadership role towards a moderating and networking leadership approach (Mütze-Niewöhner et al. 2021, p. 15).

MANAGING TECHNOLOGICAL CHANGES

Fundamental knowledge of artificial intelligence, Big Data and automation is essential for managers to be able to lead virtual and hybrid teams in the first place. The term Big Data refers to huge amounts of structured and unstructured information generated by humans and machines alike (Lattemann, Robra-Bissantz 2024, p. 388). The challenge for managers is to develop both a broad technological understanding and in-depth digital knowledge without being experts in that particular area. Furthermore, simply implementing the technology is not enough; it should be strategically integrated into the existing business models. The manager's task here is to have a good technical understanding in order to be able to decide to what extent technology serves the company's goals and what added value it actually generates (Mütze-Niewöhner et al. 2021, p. 14).

However, it is not just the technology itself that poses a new challenge; along with digitalisation, an awareness of data security and ethical implications is another core competence for managers in the age of Leadership 4.0, particularly when tackling sensitive data. Growing risks from data misuse and cyberattacks

pose an almost daily challenge to the security of a company (Huber 2024, pp. 169–170).

In conclusion, however, the balance between people and technology has top priority, as technological development supports people's work, but does not replace it. It is therefore the task of the manager to motivate employees and to demonstrate the innovation process and the extent to which technology can have a positive influence on the world of work. The challenges of dealing with technological changes therefore require a combination of strategic foresight, technical understanding and social skills in Leadership 4.0. The core message is not only to implement technology, but to use it consciously and responsibly in the interests of the company and its employees (Huber 2024, pp. 173–174).

BALANCE BETWEEN AUTONOMY AND CONTROL

The above outline makes it clear that Leadership 4.0 presents an individualised leadership model. Hence, managers face the difficulty of taking into account their employees' different needs and abilities in terms of autonomy and control in the work process. As already mentioned, the physical absence of the manager in hybrid and virtual teams poses an additional challenge, as new strategies must be developed to promote the autonomy of remote employees while still maintaining a certain degree of control. Since excessive control leads to the inhibition of intrinsic motivation, while at the same time a high degree of autonomy can lead to excessive demands and disorientation, it is important for managers to establish the optimal middle ground (Mütze-Niewöhner et al. 2021, pp. 18–20).

One approach to overcoming this challenge is to formulate clear objectives and responsibilities so that employees are aware of the framework within which they are allowed to act. A continuous feedback culture also helps to promote employees' personal responsibility and to consistently adapt the existing management style to current circumstances. The balance between autonomy and control requires a paradigm shift in the area of leadership, as clearly defined framework conditions can promote employee autonomy while at the same time regular checks and targeted support could ensure that goals are achieved (Mütze-Niewöhner et al. 2021, p. 17).

RESULTS

Leadership 4.0 is a modern form of leadership that is characterised by the dynamic requirements of the VUCA world and the principles of New Work. These developments bring with them specific challenges that managers need to overcome in order to operate successfully.

Furthermore, Leadership 4.0 faces the task of transforming traditional leadership approaches and developing new skills in order to meet the demands of a dynamic, digital and flexible working world. The key lies in the combination of technological understanding, social competence, and the ability to motivate and lead employees in uncertain times. Successful leadership in this context requires not only new tools and methods, but also a fundamental change in the attitude and mindset of managers.

CONCLUSIONS AND DISCUSSION

In summary, it should be emphasized that leadership in the era of Leadership 4.0 is characterized by structural changes. The present work addresses these by explaining the terms VUCA-World and New Work and then addressing individual challenges in detail.

However, it should be noted that this paper is merely a theoretical analysis and thus practical recommendations for action are only given peripheral consideration. For a company to remain competitive, it is essential that the individual challenges be initially outlined in order to develop suitable management approaches on this basis. The nature of leadership is changing from authoritarian and traditional in style, to digital, agile or transformative. The existing challenges need to be analysed in detail and, ideally, taken into account within the prevailing leadership style to ensure the long-term success of the company.

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ПРЕДИЗВИКАТЕЛСТВАТА НА ЛИДЕРСТВОТО В ЕРАТА НА ЛИДЕРСТВОТО 4.0

Резюме: Ерата на лидерството 4.0 доведе до големи промени и предизвикателства за лидерите, които се характеризират с дигитализация, глобализация и променящ се свят на труда. В света на VUCA, където изискванията за технологична компетентност непрекъснато се увеличават, ръководителите трябва да се научат да реагират бързо на непредвидими развития; в допълнение към това принципите на Новата работа изискват преориентиране на традиционните лидерски подходи. Управлението на хибридни и цифрови екипи е особено предизвикателство, както и поддържането на баланс между автономност и контрол. Ето защо фокусът на настоящата публикация е насочен конкретно към предизвикателствата, пред които е изправено управлението в епохата на Лидерство 4.0. На първо място, основните технически термини са обяснени подробно, за да могат целенасочено избраните предизвикателства да бъдат разгледани допълнително. Лидерство 4.0 изисква цялостна промяна в нагласите и уменията на мениджърите. Само тези, които съчетават технологични, социални и стратегически умения, ще могат да ръководят успешно в динамичния и дигитализиран свят на труда.

Ключови думи: Лидерство 4.0, VUCA свят, нова работа, предизвикателство, лидерска култура

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

A LOOK AT GENERATIONS: GEN Z AND ITS EXPECTATIONS OF LEADERSHIP

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Abstract: *The emergence of Generation Z (Gen Z) on the labour market has had a major impact both on the economy and on the working life itself. Generation Z, born from the mid-1990s onwards, shows many differences to previous generations. With the Baby Boomers and Generation Z, two generations that could not be more different are coming together on the labour market. The Boomers, who grew up in prosperity, have lived by the motto 'live to work', Generation Z on the other hand, fits in best somewhere between smartphones and social media. The guiding principle of this generation is: 'Here is work, there is my life'. In order to remain competitive, companies and managers in particular must adapt to the new generation and their values. The present work provides a detailed overview of the last four generations and highlights different approaches that leaders should consider when working with Gen Z. The literature search is based on sources from journals, textbooks, studies and online articles. Generation Z represents a new type of employees for most companies. They reject work-life blending and because of their so called 'helicopter parents' are often not self-reliant. But Generation Z still has a significant role to play in the future: at 19.7%, this generation proves to be the largest age group as of December 31, 2023. An open and modern corporate and leadership culture is needed in which achievement is recognized. Rigid hierarchies and orders given by superiors no longer work in the same way. The optimal manager of today should lead at eye level and act more as a mentor rather than a boss. Recognition, open communication and honesty are the most important demands that Gen Z places on leaders. Because of the strong urge for self-determination, important factors in the management of Gen Z are also the promotion of responsibility and the ability to share one's own ideas. Successful leaders of the future should be both team coaches and facilitators; a large range of skills and knowledge, good communication skills and flexibility are also a prerequisite.*

Keywords: *Generations, Gen Z, changing values, leadership, recognition*

INTRODUCTION

The emergence of Generation Z in the world of work presents a new challenge, but also brings with it new opportunities. Like all previous generations, this generation also has a significant impact on the working life, the economy and the talent management (Parment 2024). According to international economic forecasts, by 2030 Gen Zers will make up around 30% of the workforce in Germany, the UK, France, Australia, the USA and the Netherlands (Oxford Economics 2021). Combined with the ever-increasing shortage of skilled labour in Germany, these figures make it clear that Gen Z is absolutely relevant for the future of business and management (Statista 2025).

In order to remain competitive in the long term, managers and companies need to move with the times and be open to new generations and their values. Therefore, appropriate management is a key performance driver for a company's success.

RESEARCH METHODOLOGY

This publication is based on a literature review focusing on an overview of the different generations with a focus on Generation Z and their leadership requirements. The literature review includes books, online articles, journals and studies. First, an overview of the existing generations is presented in order to understand how and why they differ. This is followed by a closer look at Generation Z and in particular how leadership needs to develop in the age of the new generation.

RESULTS

Daily working life in many companies is often determined by the different generations employed there, these are the Baby boomers and Generations X, Y and Z. Baby boomers, who were born after the World War II, still characterise the term Baby boomer today. Generation X owes its name to the Canadian Douglas Coupland and his book of the same name, in which he describes generation X and how it feels (Mangelsdorf 2015).

But what exactly does the term *generation* stand for?

Sociology describes the term *generation* as follows: “The totality of people of approximately the same age group with a similar social orientation and a view of life that has its roots in a person’s formative years.” (Mangelsdorf 2015).

Formative years are defined by sociologists as between the ages of 11 and 15, i.e. the years between childhood and puberty. During this time a young adult begins to consciously perceive their environment. This is the time when individual preferences and values are shaped by the perception of political and social events. The shared experience of these events significantly defines the individual generations. Such binding experiences of the formative years are more important than the precise determination of birth dates. Different sources sometimes provide slightly different years of birth, but transitions are always fluid.

A generation is therefore identified when various social conditions shape the development of values, behavioural preferences and characteristics of people of a similar age (Mangelsdorf 2015).

To get a clear idea of the common terms, the individual generations will now be analysed in more detail.

Table 1. Generations at a glance (Mangelsdorf 2015).

Generations in Germany	Years of birth	Age groups (as of 2024)	Formative years
Traditionalists	1922 – 1945	79 – 92 Jahre	1933 – 1960
Babyboomers	1946 – 1964	60 – 78 Jahre	1957 – 1979
Generation X	1965 – 1979	45 – 59 Jahre	1976 – 1994
Generation Y	1980 – 1995	29 – 44 Jahre	1991 – 2010
Generation Z	1996 – ?	28 Jahre und jünger	2007 – ?

The four generations that are part of the working world today are defined in more detail below.

Baby boomers

Baby boomers owe their core characteristics mainly to the traditionalists who raised them – a generation defined by altruism, conformity and respect for authority. In the post-war period, the lives of Baby boomers were largely characterised by optimism and increasing prosperity, in contrast to the gloomy and traumatic youth of their parents. The ‘economic miracle’ and the new social policy revealed previously unimagined opportunities for the baby boomers: they stormed into universities, schools and the labour market, had ambitious goals and either wanted to fulfil their parents’ expectations or rebelled against them. The traditional family framework consisted of a married couple with several children, in which the division of roles was clear: the mother looked after the children at home, the father went to work and provided for the family. The father was regarded as head of the family and made the decisions, while the mother and children complied (Mangelsdorf 2015).

On the one hand, there seemed to be no limits any longer; suddenly travelling abroad was possible and people were walking on the moon. On the other hand, however, the limitations that resulted from the growing prosperity could not be concealed, starting with the Berlin Wall and extending to apartheid in the USA. Over time, the world of work changed from a patriarchal, homogeneous environment to one that was increasingly defined by diversity. An ever larger number of women received higher education, which changed the prospects for women and made them aspire for roles different from that of a mere housewife,

meanwhile migrant workers from abroad also added to social diversity and intensified competition in the low-wage sector. In terms of numbers, Baby boomers are the largest generation in history and therefore learnt early on to assert themselves and work hard. Those who wanted to climb the career ladder had to assert themselves in competition. This made social advancement possible (Mangelsdorf 2015).

Generation X

While the Baby boomers were able to grow up optimistic and carefree in their youth, the next generation, Generation X had to become independent more quickly and spent less time with their parents than any generation before. Mothers began to contribute increasingly to the household income and it became common for both parents to work. Thus the offspring of the 'Golf generation' were often left in the care of their siblings or to themselves. There were more and more patchwork families or single parents, divorce rates rose and the traditional family framework gradually dissolved (Mangelsdorf 2015). Social and political order and stability gave way to certain doubts about existing systems. Trust in institutions and politics was shaken by terrible events such as the Chernobyl disaster, IRA, RAF and ETA terrorism. At the end of the 1980s, the global economy entered a period of crisis, which made Generation X realise that the ever-increasing prosperity of their parents' generation could hardly be achieved. Resignation and disorientation gradually spread; autonomy and independence substituted respect for authority and were viewed as a logical consequence of Generation X's childhood (Mangelsdorf 2015). Technological progress continued to move forward and the desktop computer soon became part of everyday life. The first mobile phones appeared on the market and the advent of email accelerated the pace of work.

High salary, long working days and a prestigious job title were considered professional success, making fashionable luxury such as long-distance travel and expensive cars possible. All ambitious graduates dreamed of the position of management consultant or a banker. It was accepted that one should sacrifice leisure and quality of life for the sake of desirable status symbols and attractive remuneration. Effort as a prerequisite for reward was the world outlook of Generation X. Generation X questioned authority more frequently and demanded that respect first be earned, both from individuals and from politicians and companies alike. A trend towards the formation of social groups and individualization began; many no longer wanted to 'belong'. Young people increasingly rejected the established socio-political and moral values of their parents' generation and so the era of protesting punks, nuclear power opponents and eco-movement supporters began (Mangelsdorf 2015).

Generation Y

For the Baby boomers the future still looked rosy, for Generation X more depressing, and Generation Y wondered if a future existed at all. At the face of pollution threats, global warming, school shootings and natural disasters, Generation Y chose to enjoy life. Unlike their ancestors, they did not express their fears in resignation or frustration. The parents of Generation Y didn't get much attention as children, that is why they wanted to do better with their own offspring. From an early age Generation Y's were showered with recognition, attention and appreciation. The well-meaning parents of the new Generation Y stopped at nothing to provide their kids with good education and to make their path to adult life as smooth as possible. Generation Y children were praised and rewarded for every little effort they made and when in doubt, their parents even allowed them to decide about family holidays (Mangelsdorf 2015).

The numerous studies that have been carried out confirm some important characteristics of Generation Y, for example, the ability to use freely new technologies and the Internet, as well as their tendency to differentiate between their own lives and the world around them. Because of the many opportunities available, people now have the chance to consider different paths of life. The young members of Generation Y get inspired by the endless possibilities of modern society to plan their life and future in new ways (Parment 2013).

Generation Y, now grown up, has high expectations in terms of co-determination and recognition. They often rely on the advice of their parents and are irritated when managers and superiors at work do not offer the same support and protection that they are used to receiving at home. It's not by accident that their parents have gained the nickname 'helicopter parents', as they tend to circle over their brood like helicopters.

Generation Y sees work as an opportunity for self-development and fulfilment that should be designed in such a way as to fit into their current life model. Due to the fast pace of everyday life, the Ypsilonians strive for immediate fulfilment of their needs and goals. ‘Waiting’ does not exist in their world. This generation has grown up with the internet and their everyday life is determined by technological achievements and multimedia communication. Immediate feedback is demanded. Although the ‘spoilt’ Ypsilonians have been raised without feeling the lack of anything, they display a great need to optimise the world and to find meaning and inner fulfilment. Despite all the distractions of everyday life, they seek content and emotional connection that go beyond the superficial (Mangelsdorf 2015).

Generation Z

In some cases, it is still difficult to define Generation Z precisely. On the one hand, because they are partly similar to Generation Y and on the other, because they are still in the middle of their formative years.

Similar to the Ypsilonians, Generation Z has been growing up in a world of abundance. For the most part, they have lacked nothing in terms of material comfort, even though the number of children in Germany that live on the edge of poverty is increasing. This generation is growing up in relative prosperity and secure political conditions, and they also benefit from a wide range of educational opportunities (Mangelsdorf 2015). Both Gen Z and the previous generation tend to have a pronounced international outlook, an embracing attitude towards foreign cultures and a high level of education (Geibel, Tiffert 2020).

The most significant event in the life of this generation has been the wide spread of the Internet, which is why they are often referred to as ‘Generation Internet’. The unlimited access to information in every part of the world and the spread of social media platforms have led to a natural use of new communication technologies (Geibel, Tiffert 2020).

At the same time, Gen Z is part of a large and globalised world that is characterised by conflicts, environmental disasters and financial crises. In this context, the family serves as a safe haven while its framework can be structured more diversely than ever before, from patchwork families to single-parent families that often replace the traditional family concepts. All parents have something in common though – they want to enable their children to grow up carefree (Mangelsdorf 2015). It is not surprising then that their offspring should become accustomed to being constantly protected, pampered and catered for and that their resulting need for a secure and carefree life should be taken for granted (Mangelsdorf 2015).

In a study of 12,000 participants conducted by Celepedia in 2016 it was found out that Gen Z place the highest value on friendship, partnership and family. These were followed by values such as security, self-fulfilment, professional success and financial independence (Bödeker, n.d.).

Labour market expectations

For most companies, Generation Z represents a new type of employees that reject work-life blending and because of their helicopter parents are often regarded as less independent (Rosenstiel et al. 2020). The question that arises here concerns the importance of Gen Z for the companies of today and its relevance for the labour market of the future (Bürkle 2023).

A closer look at the age groups in Germany clearly shows the importance of this generation for the future. With a share of 19.7% of all inhabitants in Germany, Gen Z proved to be the largest age group as of 31.12.2023 (Statista 2024), a sure sign for its significant labour market potential.

Generation Z and the Baby boomers represent two segments of the labour market that couldn’t be more different. On the one hand, the boomers who grew up in prosperity and followed the principle ‘live to work’; on the other hand, Gen Z, who as digital natives, live between smartphones and social media. They are guided by the motto: ‘Here is my work, there is my life.’ (Jäger, Randstand 2021). Generation Z is often accused of being picky and lazy. A survey of all older generations (traditionalists, Baby boomers, Generations X and Y) showed that over two thirds of the participants believe that Gen Z is less productive at work than the other generations. 49% of Gen Z themselves shared this opinion. However, the other side of the coin also needs to be considered: the majority of Generation Z put a high value on being successful at work (Statista 2024a).

A study conducted in 2021 aimed at establishing those values that are particularly important to

Generation Z when it comes to organising their lives. For this purpose, 1059 employees aged 16 and over were surveyed (Jager, Randstand 2021).

Table 2. Generation clash? What is particularly important when organising your life? (Jager, Randstand 2021).

	Generation Z	Babyboomer
Material prosperity	83%	87%
To feel needed	68%	76%
To have a lot of free time	53%	27%
Self-fulfilment	56%	43%
To make a career	53%	36%

The study clearly shows that material wealth and the notion of ‘feeling needed’ play an important role both for Gen Z and the Boomers. Leisure time, self-fulfilment and career, on the other hand, are particularly important for the young Generation Z.

The conclusion is that members of the younger generation should not be tarred with the same brush; similarly, when it comes to superior management at work, they also have different needs and expectations from those of previous generations (Statista 2024a).

Expectations of the managers

Gen Z shows a skeptical attitude towards hierarchies and instructions issued from superiors, its representatives demand transparency in terms of communication and decisions. While Generation Y strove for freedom and flexibility, Generation Z has a strong need for structure, clearly defined working hours and a fixed personal workplace. Work and leisure time are strictly separated. Should these requirements not be fulfilled by the employer, Gen Z staff are likely to resign and move on. This internet generation is considered the most disloyal generation that the labour market has ever known (Geibel, Tiffert 2020).

Gen Z strives for a modern and open leadership culture in which performance is recognised and valued (Statista 2024a). The most frequently mentioned characteristic for the ‘perfect manager’ is the ability to do his/her job on the principle of equality (Bürkle 2023b quoted from Bürkle;Tawadrous). Increasingly more young people of today are looking for ‘mentors rather than bosses’ (Bürkle 2023b cited by Rabhansel & Scholz).

Apart from this, Gen Z’s pronounced need for self-determination emphasizes the promotion of responsibility and the personal contribution of new ideas. According to a study by SwissSkills, these two characteristics ‘only’ come in third place. The most important requirement for a superior has to do with acknowledgement, which also includes respect and trust. Open communication and honesty are also at the top of the list. It is important for men to be able to contribute their own ideas (31%) and participate in decisions (18%), while equal rights (25%) are very popular with women (Stamm 2023).

Table 3. The 3 most important managerial qualities for Gen Z.

Values such as trust, respect, etc.
Honesty and open communication
Contributing with personal ideas
Promoting personal responsibility
Clear and well-structured instructions
Participation in decision-making
Regular feedback
Equal treatment
Directness
Sympathetic support in case of personal difficulties

Future requirements profile

The role of the new generation in the labour market and the rapid world changes have placed new demands on managers and have resulted in some changes in their area of expertise:

- In the future, instead of the “best professional” we will be looking for a coordinator, which means the leader will become a consultant, coach and moderator of the team.
- Interdisciplinary-minded generalists will be needed to drive innovation. Strictly located career in one department will not be enough to develop broader professional horizons; the motto here will be: personnel development.
- Communication skills will be of particular importance for managers, Generation Z values appreciative communication with regular feedback.
- Confident and skilled employees cannot perform well under pressure over time. More importance will be attached to leadership as a role model, also on authentic behaviour, persuasiveness and motivation.
- In an increasingly fast-moving world, agility is becoming ever more important; managers will be required to cope with changes at ever shorter intervals. Existing business processes should be continuously optimised. As ‘change managers’ leaders will have to steer and shape these change processes successfully, to embrace innovations and convince employees to do the same (von Rosenstiel et al. 2020).

CONCLUSIONS/DISCUSSION

In conclusion, it can be argued that Generation Z presents new challenges to the world of work which managers and companies need to acknowledge if they want to remain competitive in the long term. Each generation has grown up differently and experienced different peaks and crises. The values of Generation Z show that traditional hierarchies and strict instructions issued from senior managers will no longer be accepted. Generation Z demands a clear separation between work and leisure time and wants an open management culture which acknowledges performance. Therefore, the future role of managers will be that of mentors and role models rather than superiors.

In summary, it can be argued that the latest transitions in terms of generations offer enormous opportunities for companies and managers to establish themselves in the market in the long term, provided that they are willing to accept these and adapt to them.

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ПОГЛЕД КЪМ ПОКОЛЕНИЯТА: ПОКОЛЕНИЕТО Z И НЕГОВИТЕ ОЧАКВАНИЯ ЗА ЛИДЕРСТВОТО

Резюме: Навлизането на поколението Z (Gen Z) в работната сила оказва голямо влияние върху икономиката и професионалния живот. Поколението Z, родено от средата на 90-те години на миналия век, показва много разлики с предишните поколения. С бейбибумърите и поколението Z на пазара на труда се срещат две различни поколения, които не биха могли да бъдат по-различни. Бумърите – израснали в благоденствие – живеят под мотото „живей, за да работиш“, докато поколението Z е някъде между смартфоните и социалните медии. Това поколение живее според мотото: „Тук е работата, там е моят живот“. За да останат конкурентоспособни, компаниите и по-специално мениджърите трябва да се адаптират към новото поколение и неговите ценности. Този документ предоставя подробен преглед на поколението и показва различни подходи, които мениджърите трябва да вземат предвид при работа с поколението Z. Литературното проучване се основава на източници от търговски списания, специализирани книги, проучвания и онлайн статии. Поколението Z е нов тип служители за повечето компании. Те отхвърлят съчетаването на професионалния и личния живот и понякога са трудно независими поради родителите хеликоптери. Въпреки това поколението Z е значителен фактор за работните места в бъдеще: с 19,7% това поколение е най-многобройната възрастова група към 31 декември 2023 г. Те искат отворена и модерна корпоративна и управленска култура, в която резултатите се признават. Строгите йерархии и инструкциите отгоре вече не работят по същия начин. Идеалният мениджър ръководи и действа по-скоро като ментор, отколкото като началник. Признателност, открита комуникация и честност са най-важните изисквания на поколението Z към мениджърите. Поради ясно изразеното желание за самоопределяне насърчаването на поемането на отговорност и възможността за принос на собствени идеи също са важни фактори в управлението на Gen Z. Успешните мениджъри на бъдещето са треньор и модератор за екипа, имат добри комуникационни умения, генералисти са и могат да действат гъвкаво.

Ключови думи: поколения, Gen Z, промяна в ценностите, лидерство, оценяване

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ОБЩЕСТВЕНИ КОМУНИКАЦИИ И ИНФОРМАЦИОННИ НАУКИ
PUBLIC COMMUNICATIONS AND INFORMATION SCIENCES

**THE DEVELOPMENT OF MODERN LEADERSHIP STYLES
THROUGH DIGITALISATION**

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Abstract: *The digital transformation has not only influenced leadership styles and models but has also fundamentally changed the structure of organizations. It has led to an expanded competitive environment for companies and altered profit distribution through new business models. Professor Dr. Isabell Welpé, holder of the Chair of Strategy and Organization at the Technical University of Munich, has accompanied several companies in restructuring their leadership approaches by integrating digitalization into the process. Traditional leadership styles have been reconsidered, and Welpé has co-authored several readings, both with and without her research team, to highlight the consequences of the digital age concerning corporate hierarchies. Generally, a development in corporate governance has emerged that has far-reaching implications for the overall market. New startups place great emphasis on customer retention and utilize digitalization to develop a precise understanding of the individual needs of their target audience. Instead of replicating the entire value chain, they focus on analyzing its end. Highly skilled professionals working freelance for various companies are integrated into this process, with so-called “clickworkers” taking on tasks traditionally performed by permanent employees. These freelancers specialize in capturing the specific needs of end customers and offering tailored products. Moreover, today’s end customers unconsciously play an active role in the work process by directly providing companies with suggestions for new products and improvements to be implemented. For instance, Tchibo presents newly developed designs for voting on its homepage, leaving decision-making to its target audience. Professor Dr. Thorsten Petry authored a guide on successful leadership in times of the digital economy. Both Welpé and Petry aim to provide insights into this type of leadership. Subsequently, a discussion will address the advantages and disadvantages that have arisen and how existing challenges can potentially be overcome.*

Keywords: *Leadership style, Digitalization, Digital Leadership, Management*

INTRODUCTION: THE CHANGING ECONOMY DUE TO DIGITALIZATION

The increase in digitalization can no longer be denied today. The advancement of AI and other programs, as well as the transition from analog media to the digital world, demonstrate an ongoing upward trend. KPMG published a paper on revenue growth and increased customer acquisition when successfully managing digitalization. The goal is to simplify workflows and strengthen customer and employee loyalty. Social media content and systems that monitor and analyze customer satisfaction are at the forefront of companies’ focus. KPMG surveyed 115 firms, finding that over 50% already utilize digitalization for revenue enhancement and believe that new technological innovations are expected across all departments within a company (KPMG 2015, p. 9). Digitalization can be understood in two ways: On a technical level, it refers to “the preparation of information for processing or storage in a digital system”. When considering all consequences of digitalization, it can be defined as a technological development that enables a transformation process for companies, resulting in organizational, strategic, and sociocultural changes (Petry 2019, p. 23). If customers and employees respond positively to technological developments, companies must also adapt to continue establishing themselves successfully. For example, if a company’s target audience frequently engages with social networks, advertising is best placed there. The most successful companies of the 21st century represent platform-based businesses that connect online user groups (e.g., Meta Platforms Inc.) for interaction while also communicating with the offline world via the internet for faster process handling (e.g., Uber) (Petry 2019, p. 25). If digitalization is indeed the solution for increasing company profits, leaders must be willing to market their products or services online while also digitizing workflows to

keep pace with internet speed. To underscore this situation, Petry defines the VUCA environment in which leaders now operate (Petry 2019, p. 46).

THE “VUCA-ENVIRONMENT”

The acronym stands for Volatility, Uncertainty, Complexity, Ambiguity. Volatility refers to instability; frequent changes should be expected. If this is not possible, flexibility is required to quickly adapt to situations. Uncertainty represents opaque situations that necessitate information-seeking behavior; leaders should be prepared to experiment amid ignorance. Complexity pertains to balancing fundamental rules that need establishment with processing mechanisms designed to address atypical situations that cannot be reduced to basic rules. Ambiguity signifies contradictory environments where hypotheses must be tested and mistakes reflected upon (Bendel 2021). In such a VUCA environment, forecasting business development becomes increasingly challenging; particularly in the digital age do all four components simultaneously impact a company. According to Petry, this necessitates a change in corporate leadership structures; previously successful analysts who adhered strictly to long-term planning must now be “reconsidered” (Petry 2019, p. 46).

THE MODERN LEADERSHIP STYLE OF “AGILE LEADERSHIP”

According to Petry, the VUCA environment leads to new expectations placed upon leaders – one core aspect being agility – which has given rise to a new leadership style: Agile Leadership. This style describes the ability to embrace change and adapt current situations accordingly; it is part of modern leadership paradigms. Agility – originally a term from software development – describes within the VUCA environment a leadership theory characterized by constant adaptability. The Haufe publishing house refers both to organizational structures and processes as well as management behaviors necessary for adapting radically changing conditions effectively. Role modeling replaces authoritative leadership as traditional hierarchies dissolve; high-ranking positions should act as pioneers by embodying corporate vision through their actions.

Instead of rigid directives being imposed from above, only frameworks are established allowing employees room for individual development experiences. Self-responsibility is cultivated within cross-functional teams where decisions are made directly by team members engaged in self-organized work processes – creating space for progressive ideas which can be trialed without immediate repercussions.

Although this leadership style may initially resemble transformational leadership theories predating digitalization, agility remains distinct: Leaders operate on equal footing with their employees while fostering an environment conducive to agile work practices.

By enabling direct implementation of new ideas based on lessons learned from mistakes – and possessing an inherent capacity for rapid adaptation amidst external changes – agile leaders exemplify modern management principles (Rutz 2017).

SHARED AMBIDEXTROUS LEADERSHIP

In today’s fast-paced world driven by digitalization, Petry discusses implementing “shared leadership”, also referred to as “ambidextrous leadership”, which aims at enhancing efficiency through quick decision-making processes alongside self-leadership capabilities among team members.

The demands placed upon leaders increasingly exceed what any single individual can offer; thus agile leadership seeks not only strengthening employee capabilities but also facilitating individualized growth opportunities.

Shared leadership delegates managerial responsibilities among those team members possessing requisite competencies – aiming towards mutual guidance within teams striving toward common goals while distributing responsibilities equitably.

The definition of ambidexterity describes executing tasks equally skillfully with both hands; applied within organizations it denotes leaders’ ability balancing innovation against efficiency demands – allowing room for errors while simultaneously establishing guidelines around which teams orient themselves.

This blend between establishing routines alongside encouraging free expression gave rise shared

ambidextrous leadership – a model redistributing tasks focused on empowering employees alleviating burdens from managers while amplifying partners' strengths.

Team leads assume responsibility implementing efficiency – or innovation-enhancing ideas within set parameters alongside hierarchical direction defining boundaries whilst horizontal collaboration fosters creative freedom among peers undertaking projects together.

Inter-team exchanges are strengthened yet guided towards intended outcomes through established frameworks (Rudolf, Bruch 2023).

A study conducted at St. Gallen University under Prof Bruch examined 646 work areas across 73 companies regarding creativity – versus efficiency-promoting management styles revealing positive impacts from modern “Shared Ambidextrous Leadership” on both performance metrics related efficiency gains alongside willingness towards innovation initiatives within firms.

Combining open idea exchanges exploring novel thought structures along with implementing frameworks guiding team member interactions yielded ten percent higher ambidextrous behavior amongst staff members – with emotional exhaustion decreasing eleven percent while organizational performance rose nearly identically (Rudolf, Bruch 2023).

Another success factor highlighted by the study is the changing role of the leader. The leader is seen as an inspiration, uniting efficiency with creativity by communicating an overarching goal that every employee can identify with, based on their contributions along the hierarchical structure. Due to the particularly flat nature of the hierarchy, the leader becomes a team member. Such role modeling is believed to enable more employees to adopt leadership roles and even identify with them. A social fabric emerges among team members that is more interconnected than in traditional leadership styles (Rudolf, Bruch 2023).

RESULTS

In the digital age, rapid growth of companies is encouraged, and communication within the value chain is enhanced. Employees are informed more quickly, and there is now the possibility of spatial separation despite high revenue-generating work. However, the labor market is also burdened by the fact that negative aspects within a company can be communicated just as swiftly, making it easier to poach strong employees through digital means. Consequently, new leadership approaches are being sought to strengthen employee retention while leveraging digitalization. Flat hierarchical leadership methods allow employees to grow by expressing creativity and working more efficiently through digitalization. This ambidexterity in leadership fosters employee satisfaction, which in turn boosts company revenue and counteracts employee turnover. The vision is exemplified and integrated into the structure to provide partners with a “why” for their activities and present a common goal. The paths to achieving this goal are freely selectable within established frameworks, allowing innovations to emerge from employees themselves that aim to improve processes in the future. The combination of efficiency and creativity delivers a new way of working that emphasizes freedom for employees.

CONCLUSION

The described leadership style, as well as the impact of digitalization on entrepreneurship, will be elaborated upon using sources that express clear opinions. The investigation into ambidextrous leadership was conducted by St. Gallen University and not personally by the author of this publication. While various readings confirm the theory that digitalization enables more efficient work processes, such statements can never be absolute. Similarly, no single leadership style can serve as a solution for every company; validation within one's own organization is necessary.

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РАЗВИТИЕ НА СЪВРЕМЕННИ УПРАВЛЕНСКИ СТИЛОВЕ ЧРЕЗ ДИГИТАЛИЗАЦИЯ

Резюме: Цифровата трансформация повлиява не само на стиловете и моделите на ръководство, но и променя из основи структурата на организациите. Тя е довела до разширяване на конкурентната среда за компаниите и променя разпределението на печалбата чрез нови бизнес модели. Професор д-р Изабел Велпе, титуляр на Катедрата по стратегия и организация в Техническия университет в Мюнхен, е съпровождала няколко компании в преструктурирането на техните лидерски подходи чрез интегриране на цифровизацията в процеса. Традиционните стилове на ръководство са преразгледани, а Велпе е съавтор на няколко четива както с изследователския си екип, така и без него, за да подчертае последиците от цифровата ера по отношение на корпоративните йерархии. Като цяло в корпоративното управление се появява развитие, което има дългосрочни последици за целия пазар. Новите стартъпи поставят голям акцент върху задържането на клиентите и използват цифровизацията, за да развият точно разбиране на индивидуалните нужди на целевата си аудитория. Вместо да възпроизвеждат цялата верига на стойността, те се съсредоточават върху анализа на нейния край. Висококвалифицираните специалисти, работещи на свободна практика за различни компании, се интегрират в този процес, като така наречените „кликери“ поемат задачи, традиционно изпълнявани от постоянни служители. Тези служители на свободна практика са специализирани в улавянето на специфичните нужди на крайните клиенти и предлагането на продукти, съобразени с тях. Нещо повече, днешните крайни клиенти несъзнателно играят активна роля в работния процес, като директно предоставят на компаниите предложения за нови продукти и подобрения, които да бъдат внедрени. Например Tchibo представя новоразработените дизайни за гласуване на своята начална страница, като оставя вземането на решения на целевата си аудитория. Професор д-р Торстен Петри е автор на ръководство за успешно лидерство във времената на цифровата икономика. И Велпе, и Петри имат за цел да предоставят информация за този вид лидерство. Впоследствие ще се проведе дискусия, в която ще бъдат разгледани възникналите предимства и недостатъци и как съществуващите предизвикателства могат потенциално да бъдат преодоляни.

Ключови думи: лидерски стил, цифровизация, цифрово лидерство, управление

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THE MANAGEMENT PARADOX AND ITS EFFECT ON SCHOOL

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Abstract: *This study explores the management paradox and its impact on school principals, highlighting the challenges they face in balancing conflicting demands such as autonomy vs. centralization, control vs. flexibility, and innovation vs. stability. The research identifies key paradoxes within the education system and examines how school leaders navigate these contradictions while striving to maintain effective leadership. Using a qualitative research approach, the study investigates different leadership strategies, organizational structures, and external pressures influencing school management. The findings suggest that understanding paradoxes as inherent organizational dynamics rather than obstacles can empower principals to develop adaptive strategies, fostering both innovation and institutional stability.*

Keywords: *management paradox, school leadership, organizational challenges, educational governance, adaptive strategies*

INTRODUCTION

School principals operate in a dynamic environment characterized by multiple, often conflicting demands. The management paradox emerges as a central theme in their leadership, requiring them to balance opposing forces such as decentralization and governmental oversight, innovation and tradition, and individual autonomy and collective decision-making. The Israeli education system, like many others worldwide, faces a tension between granting school principals increased decision-making power while maintaining centralized policies. This paradox creates challenges in leadership, motivation, and institutional management. By examining the nature of paradoxes within school administration, this study aims to provide insights into how school principals can navigate these challenges effectively.

RESEARCH METHODOLOGY

This study employs a qualitative research design, incorporating literature reviews, case studies, and interviews with experienced school principals. The research is structured around the following key components:

- **Literature Review:** Analysis of existing research on management paradoxes, educational leadership, and decentralized governance.
- **Case Studies:** Examination of real-world examples of school principals managing paradoxes in Israeli schools.
- **Interviews:** Semi-structured interviews with school principals, focusing on their perceptions of paradoxes and strategies for balancing conflicting demands.

By synthesizing these data sources, the study aims to identify patterns in leadership behaviour, policy adaptation, and resilience among school principals navigating paradoxical challenges.

Distinguish between different types of paradoxes. Management scholars have gleaned foundational understandings from the realms of philosophy and psychology regarding the handling of paradoxes. Initially, they looked to prominent philosophers to glean insights on navigating and evolving through encounters with paradoxes. Subsequently, researchers investigated how organizations confronted paradoxes and managed them. From this exploration, they identified distinct and meaningful patterns in addressing paradoxes. This endeavor led to the development of six fundamental principles for addressing and evolving through paradoxes within organizational contexts (Schad 2016).

The six foundational elements (building blocks) of paradox within the science (study) of management are as follows:

- a. Categories – These encompass various types of paradoxes that underscore the tension between divergent elements and highlight their inherently contradictory nature.
- b. Interconnections – This pertains to how the diverse contradictions within an organization are interrelated and function within the same framework. Paradoxes are not discrete entities; rather, they mutually influence one another and the organization.
- c. Collective Approaches – This aspect underscores the importance of incorporating diverse internal and external factors into the organization's understanding of paradoxes. It emphasizes the necessity for coordination and collaborative efforts among different stakeholders to leverage organizational paradoxes effectively.
- d. Individual Perspectives – This segment delves into the emotional and cognitive approaches of individual actors in response to organizational paradoxes, examining their reactions and behaviours accordingly.
- e. Outcomes – This section evaluates the outcomes resulting from various responses to paradoxes within the organizational context.
- f. Dynamics – This component explores the recurring cycles characteristic of a paradoxical reality. Paradoxical tensions give rise to repeated patterns of interaction within an organization.

These foundational principles enable us to comprehend the inherent paradoxes within organizations and prepare ourselves to confront the associated challenges. When considering the broader education system, particularly focusing on the educational landscape in Israel, these fundamental concepts aid in identifying the obstacles encountered by school principals.

In general, in organizational settings (Smith W. K. 2011), conflicting demands manifest in various forms, impacting organizational processes and decision-making. Examples of such conflicting demands include:

Collaboration-Control: Organizations often grapple with the tension between fostering employee collaboration for innovation and teamwork while maintaining control over processes and outcomes to ensure efficiency and effectiveness.

Individual-Collective: Striking a balance between the needs and aspirations of individual employees and the collective goals of the organization can lead to tensions regarding autonomy, teamwork, and organizational performance.

Flexibility-Efficiency: Finding an equilibrium between adaptability to changing market conditions and maintaining operational efficiency and resource utilization poses a challenging paradox for organizations.

Exploration-Exploitation: Organizations must navigate the tension between exploring new opportunities for growth and innovation while leveraging existing resources and capabilities to maximize current performance and profitability.

Profit-Social Responsibility: Balancing the pursuit of financial profitability with social and environmental responsibility can give rise to tensions surrounding ethical decision-making, stakeholder interests, and long-term sustainability.

These conflicting demands introduce complexity, ambiguity, and uncertainty into organizational processes, necessitating the development of strategies to effectively manage these tensions. Adopting a dynamic equilibrium approach, which embraces paradoxical tensions, fosters creativity and learning, and allows for flexibility and resilience, is crucial for achieving long-term success (Teece D. J. 1997).

The internal and external paradox within schools. The internal and external paradox within schools is evident in the decentralization policy implemented by the Ministry of Education in Israel, which significantly impacts the authority and autonomy of school principals. This policy shifts decision-making power from centralized systems to individual schools, thereby augmenting administrators' (principals') authority, autonomy, and discretion. Consequently, principals are tasked with assuming leadership roles and shouldering increased responsibilities within their respective schools (Eden 1998).

This move towards decentralization empowers principals with greater control over decision-making processes within their schools. They possess the autonomy to make decisions concerning curriculum, staff management, and resource allocation based on the specific needs of their school community. This expanded

authority enables principals to customize educational programs and initiatives to better address the unique challenges and opportunities present in their schools.

As a result, there is an expectation placed on principals to foster growth and stability within their schools. To achieve this, administrators must first and foremost motivate their staff, particularly teachers, to collaborate in leading the school towards shared goals. However, they often encounter motivational challenges among teachers due to various reasons (Golding 1993):

Limited Incentives: Teachers may lack sufficient incentives to undertake additional work or responsibilities beyond their regular duties.

Burnout: The demanding nature of teaching can lead to burnout among teachers from the pressures of their regular workload.

Fear of Consequences: Teachers may fear negative repercussions, such as increased workload or testing, if they take on additional responsibilities.

This dynamic highlights the expectation from both supervision and external factors for school principals to drive progress, while simultaneously facing resistance or reluctance from the educational staff to embrace the changes being promoted (source). These factors underscore the importance of collective approaches and individual strategies embedded within the educational institution.

Consequently, principals find themselves in a dilemma where they strive to push forward, sometimes independently, while also recognizing the significance of collaborative efforts (Gibton 2002). Zhang (2015) identifies five dimensions of paradoxical leader behaviour that reflect the seemingly conflicting, yet interconnected behaviours that leaders engage in, in order to manage a quality organization that functions even in paradoxical situations:

- a. Balancing self-focus with focus on others
- b. Maintaining both distance and closeness
- c. Applying uniform treatment to subordinates while allowing for individualization
- d. Enforcing work requirements while providing flexibility
- e. Maintaining control over decisions while granting autonomy.

The challenge that schools' principals face is the difficulty of working in a public setting, which does not allow compensation and personal reward, with a team that does not always want the change it is trying to lead. It should be emphasized that different systems in the world cracked the system and found a way to allow the teacher in a system of conditions for growth and growth "only as a teacher" within the school (Darling-Hammond 2017). The Israeli education system has not yet cracked the possibility of personal growth within the system as a teacher compared to other systems in the world (Darling-Hammond 2017). Considering this, there is difficulty in giving personal expression to the growth of each of the team within the formal system of the principal.

In addition, principals see themselves as an autonomous system and the policy of decentralization and restructuring of schools in Israel. However, in Israel, unlike some other countries, decentralization is characterized by informal changes, which are rarely accompanied by legislation, and therefore not accompanied by an open public debate (Sergiovanni 1995) concerning decentralization and restructuring policies in Israel.

This situation leaves school principals in a position where they are expected to advance schools in line with decentralization principles mandated by the central government, yet at times, lack the necessary tools to enact internal changes, such as motivating teaching staff, and external changes, such as formal authority for structural changes (Gibton 2002).

Looking at the paradox from a different angle. Lewis (Lewis 2000) proposes a framework for comprehending paradoxical tensions and their management, along with reviewing studies exploring paradoxes that hinder change and expansion. Examples of common paradoxes in organizational studies encompass tensions between authority and democracy, discipline and empowerment, and formalization and discretion. These paradoxes underscore the coexistence of seemingly contradictory elements within organizations, such as the simultaneous need for control and flexibility, or the dual emphasis on efficiency and creativity. Moreover, learning paradoxes involve the tension between traditional and innovative modes

of thinking and acting, while organizational paradoxes highlight simultaneously conflicting demands for performance, empowerment, and formalization.

Principals can transcend merely labeling paradoxes as problematic by utilizing the paradox framework as a thought-provoking tool or perspective to examine apparently surprising findings of organizational life. This framework aids principals in addressing existing tensions, understanding why they may fuel cycles of reinforcement, and managing paradoxes to foster change and comprehension. By actively seeking out paradoxes or explaining anomalies as they arise, principals can deepen their understanding of conflicting emotions, demands, and practices, which are more aligned with the paradoxical nature of individuals, groups, and organizational life, especially within their own organization.

A principal entrenched in the reality of inherent paradoxes can view the paradox not as an obstacle or crisis, but rather as a component that enables them to rethink the situation from a different angle. Lewis discovered that administrators who approach problems from a unique perspective often find creative solutions to these challenges.

When a administrator opts to integrate both creative and conformist teachers into the educational team, research suggests that including a mix of creative and conforming members enhances the team's radical innovation, while an imbalance towards detail-oriented members beyond a certain proportion hampers it (Cress 1997). Creative members elevate conflict within a task but impede meeting team standards, whereas conformists struggle to handle a task when it has a conflict within it but bolster the team's adherence to standards. The study identified specific ratios of different styles that influenced task conflict, team strength, and compliance with team standards. However, only team intensity mediated the impact of styles on team innovativeness (Leifer 2001).

The research concluded that team intensity mediated the effect of conformists on team innovativeness. Conformist team members contribute to team innovation by reinforcing group harmony, cohesion, and their team's confidence in successfully achieving performance goals.

As per the theory, creative members hinder adherence to standards, whereas detail-oriented and conformist members enhance it. However, this adherence, in turn, impedes the team's radical innovation (Livne-Tarandach 2004).

In light of the above, it appears imperative for the school principal to construct a team with the appropriate blend that enables them to address conflicts while also maintaining cohesion and precision in detail. Additionally, team strength serves as a crucial factor that, in turn, contributes to the ability to confront the challenges of the educational team with various factors and facilitates creativity and innovation.

Strategies to support managers in navigating organizational paradoxes

Hatch (2002) found that one can use several strategies for identifying and addressing paradoxes within the duties of the principal. These include narrative, psychodynamic, and multi-paradigm approaches.

Narrative approaches concentrate on everyday organizational life, aiming to uncover self-evident contradictions. Psychodynamic approaches delve into the underlying psychological forces and unconscious dynamics contributing to paradoxes. Multi-paradigm approaches involve integrating multiple perspectives to grasp the complexity of paradoxical phenomena. These strategies aid in identifying and interpreting tensions, as well as conceptualizing, mapping, and theorizing paradoxes, ultimately fostering a deeper understanding of paradox within organizational contexts.

When Principals adopt a perspective that acknowledges the framework of paradox within the organization and views the work within the school accordingly, they can employ these strategies to lead their teams internally while also referring external factors. For instance, consider the narrative approach: it allows us to perceive reality, which at times might present itself, as expressing the tension between central and local governments as a space filled with self-evident contradictions. Each entity advocates for its respective agendas, with the central government as a regulator striving to ensure uniformity and equal educational opportunities nationwide, while local authorities prioritize enhancing the quality of education within their jurisdictions. On the contrary, the local government will push for education which will be as good as possible in the local realm. The head of the local government is at times elected to promote the local education system.

In this conflict, the principal is often found in the range as someone who tries to respond to the national needs of the system on the one hand and trying to respond locally to the local demands of the community and of course the local government on the other hand. When a Principal recognizes this space as a reality that must be acted upon, it reduces the accompanying tension and allows him to leverage it for enhancing school performance. Recognizing this inherent contradiction within the system alleviates the constant pressure to find a solution and empowers the principal to navigate between national and local priorities. An organization that embraces this complexity and paradox as inherent elements can effectively address challenges and find solutions (alternative: An organization that knows how to provide a solution from the understanding that this is complex and paradoxical built into the organization).

In the psychodynamic approach, discussions frequently arise between parents and team members regarding effective strategies for interacting with and supporting children. A child experiencing difficulties often projects onto their parents a sense of parental inadequacy, possibly stemming from similar childhood experiences or an inability to grasp the complexity of the situation. This may be due to various factors such as: religious or communal backgrounds, etc. Conversely, the teacher may also encounter frustration when unable to effectively engage with the child, sometimes resorting to seeking quick solutions to remove the child from the classroom.

Conversations with parents are inherently emotional rather than purely professional. Principals can discern the underlying currents beneath such exchanges, recognizing the paradoxes they create in developing collaborative work plans involving parents, teachers, and principals.

In the medical field, emergency room doctors navigate tensions related to effective communication by understanding the various dimensions of communication (Putnam 2016). This involves the exchange of clear and timely information, maintaining professionalism and empathy in interactions with patients and colleagues, and managing the fast-paced, high-pressure environment of the ER. Strategies for managing these tensions may include training in effective communication skills, establishing protocols for information sharing and decision-making, and fostering a culture of open communication and collaboration among healthcare team members (Dean 2014).

These actions can also assist teaching staff in comprehending the complexities faced by individuals who may be experiencing crises as seriously as those encountered in an emergency room. A school principal who grasps the underlying dynamics can engage in effective and empathetic dialogues with all stakeholders. Furthermore, interventions such as process consultation, facilitating dialogue, and storytelling can aid in involving stakeholders, fostering shared understanding, and navigating the intricacies of change (Denis 2012). It's imperative to consider the unique organizational context and customize interventions to address specific challenges and opportunities for change (Larson 2005).

In the third multi-paradigm approach, principal may find themselves addressing all the aforementioned factors gathered around one table: the Ministry of Education, local authorities, educational staff, and parents. In such a broad forum, each participant arrives with a desire to advocate for a particular topic or plan. The principal must anticipate and reconcile the sometimes-conflicting desires of the various parties, striving to unite them in collaborative efforts.

Key strategies for managing cultural differences and internal tensions in strategic alliances include forming partnerships based on shared understanding of goals, pre-emptively addressing conflicts, establishing clear communication channels, and cultivating trust and mutual respect between partners (Cunliffe 2016). By recognizing the needs of all stakeholders and providing them with a platform, principals can foster common alliances and bridge divides between parties.

The paradox as a tool to improve processes and thinking

Paradoxical frameworks contribute to increasing personal creativity through several psychological processes. The study (Miron-Spektor 2011) indicates that adopting paradoxical frames evokes a sense of conflict and increases people's complex thinking, which leads to increased inquiry, sensitivity to unusual associations and the creation of new connections between seemingly contradictory elements. This process increases the thought processes of differentiation and integration, as expressed in the level of integrative complexity of people, which in turn increases personal creativity. The sense of conflict experienced when

adopting paradoxical frameworks may affect job satisfaction, well-being and motivation to engage in a creative task, but it also leads to the identification of creative connections between seemingly unrelated stimuli and the discovery of hidden insights (Tierney 1999).

Paradoxical frameworks play a crucial role in fostering personal creativity through various psychological mechanisms. Research conducted by Miron-Spektor (2011) suggests that embracing paradoxical perspectives triggers a sense of conflict, prompting individuals to engage in more complex thinking. This heightened cognitive processing encourages increased exploration, sensitivity to extreme situations, a greater openness to unconventional associations, and the formation of novel connections among seemingly contradictory elements. Consequently, this cognitive process enhances both differentiation and integration, as evident in the elevated level of integrative complexity observed in individuals, ultimately fostering personal creativity. While the experience of conflict arising from adopting paradoxical frameworks may impact factors such as job satisfaction, well-being, and motivation for engaging in creative tasks, it also facilitates the recognition of creative associations between seemingly disparate stimuli and the revelation of latent insights (Tierney 1999).

Moreover, paradoxical frameworks foster a concept known as “paradoxical inquiry”, where conflicting elements are exposed and explored, leading to the discovery and testing of alternative solutions. This method enhances individuals’ capacity to address strategic contradictions, ultimately yielding fresh perspectives on existing issues. Research consistently demonstrates that paradoxical perspectives boost creativity (DeFillippi 2007).

Paradoxical frameworks contribute to enhancing individual creativity by eliciting a sense of conflict, fostering complex thinking, and encouraging exploration and the formation of new associations, thereby resulting in heightened creativity.

The dynamic equilibrium model of organizational dynamics posits that paradoxical tensions are inherent and enduring within organizations. It elucidates how purposeful and cyclical responses to paradox over time facilitate sustainability, which encompasses peak performance in the present while ensuring future success. The model proposes that organizations can manage paradoxical tensions by simultaneously embracing them rather than attempting to resolve them (Smith W. K. 2011). This approach involves four key steps: stress identification, stress acceptance, stress reframing, and stress alignment. According to the model, this virtuous cycle fosters sustainability by promoting creativity and learning, fostering flexibility and resilience, and unlocking human potential (Jarzabkowski 2007).

RESULTS

The study reveals several key paradoxes influencing school leadership:

1. **Autonomy vs. Centralization:** While decentralization grants principals more authority, the lack of legislative backing results in limited actual control over systemic decisions.
2. **Control vs. Flexibility:** Principals are expected to enforce educational standards while also fostering creativity and adaptability in their schools.
3. **Innovation vs. Stability:** School leaders must encourage pedagogical innovation while maintaining structured, stable learning environments.
4. **Collaboration vs. Individual Responsibility:** Principals must balance teamwork among teachers and staff while ensuring accountability at the individual level.

Findings suggest that principals who embrace paradox as an integral part of their role—rather than a problem to be solved—develop more adaptive, creative, and sustainable leadership strategies. These include distributed leadership models, collaborative decision-making frameworks, and enhanced stakeholder engagement. The study underscores the need for professional training programs, leadership development initiatives, and policy reforms to better equip school principals for navigating paradoxical challenges in educational management.

CONCLUSION

This study highlights the management paradox as a fundamental challenge in school leadership, emphasizing the complex and often contradictory demands placed on school principals. The findings reveal that principals must navigate tensions between autonomy and centralization, control and flexibility, innovation and stability, and collaboration and individual responsibility. These paradoxes create unique challenges that require adaptive leadership, strategic thinking, and resilience.

The research suggests that school principals who embrace paradox as an inherent aspect of their role—rather than viewing it as a problem to be solved—develop more effective leadership strategies. Key approaches include distributed leadership, collaborative decision-making, and fostering a culture of adaptability and innovation. Additionally, stakeholder engagement, professional development, and policy reforms are essential in supporting principals as they manage these complexities.

To strengthen the role of school principals in handling paradoxes, educational policymakers and administrators should invest in leadership training, mentorship programs, and structural reforms that promote a balance between centralized oversight and school autonomy. By equipping principals with the necessary tools to manage paradoxes constructively, educational institutions can foster more resilient, innovative, and high-performing school environments.

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УПРАВЛЕНСКИЯТ ПАРАДОКС И ЕФЕКТЪТ ВЪРХУ УЧИЛИЩЕТО

Резюме: Изследването разглежда управленския парадокс и неговото въздействие върху директорите на училища, като подчертава предизвикателствата, пред които те са изправени при балансирането на противоречиви изисквания като автономия срещу централизация, контрол срещу гъвкавост и иновация срещу стабилност. Изследването идентифицира ключови парадокси в образователната система и изследва как училищните лидери се справят с тези противоречия, стремяйки се да поддържат ефективно лидерство. Чрез качествен изследователски подход проучването изследва различни лидерски стратегии, организационни структури и външни фактори, които влияят на управлението на училищата. Резултатите предполагат, че разбирането на парадоксите като присъщи организационни динамики, а не като пречки, може да даде възможност на директорите да развиват адаптивни стратегии, насърчаващи както иновацията, така и институционалната стабилност.

Ключови думи: управленски парадокс, училищно лидерство, организационни предизвикателства, образователно управление, адаптивни стратегии

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HOW ATTACHMENT CONTROLS OUR STRESS LEVELS: INSIGHT INTO BRAIN RESEARCH

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Abstract: *This systematic literature review highlights the formative effects of early childhood attachment experiences on stress regulation and physiological adaptability later in life. Our analysis of studies from leading scientific databases emphasises that individuals with secure attachment histories show more efficient cortisol regulation and faster return to baseline stress hormone levels. The article reveals the neurobiological mechanisms underpinning these processes, in particular the functions of the prefrontal cortex, amygdala and hippocampus in emotional and stress-related processing. Further findings show that the benefits of secure attachments persist into adulthood. These insights emphasize the urgency of developing educational practices based on biological evidence to promote effective stress management strategies from childhood onwards and thus strengthen emotional and mental health in the long term.*

Keywords: *Bonding experiences, Stress regulation, Cortisol regulation, Neurobiological mechanisms, Early childhood development*

INTRODUCTION

The way in which we experience emotional connections significantly influences our ability to deal with stress. In an era where *stress* has become a ubiquitous buzzword, the profound biological processes that actually occur when we experience stress are often overlooked. Studies show that our earliest attachment experiences – the quality of the relationships we form with the ones who take care of us as children – play a fundamental role in shaping our stress responses (Sroufe et al. 2009). Recent research from neuroscience in conjunction with Bowlby's (1969) traditional attachment theory sheds light on how these early childhood interactions and secure attachment experiences with caregivers shape not only our emotional responses but also our physiological stress regulation throughout life (Dannlowski et al. 2011).

The neurobiological mechanisms that mediate these effects are profound. Research, e.g. by Siegel (2012), shows that secure attachment experiences can positively influence the development of the prefrontal cortex and the limbic system, particularly the amygdala and the hippocampus. These brain regions are crucial for emotional processing and stress regulation (Gunnar and Quevedo 2006). The interactions that a child experiences with their carers can thus shape the neuronal architecture responsible for the regulation of stress hormones such as cortisol and the synthesis of oxytocin, the so-called bonding hormone (Hostinar et al. 2013; Rass 2017). These hormonal processes are crucial for our body's ability to adapt to psychological stress and directly influence our ability to cope with stress and emotional stability.

The influence that attachment experiences exert on these hormonal processes could open up innovative perspectives on mental health and development. Researchers have suggested that by improving the quality of attachment in the early years of life, through targeted educational and psychological interventions, long-term positive effects on stress management and overall mental health can be achieved (Cassidy and Shaver 2016). These findings could help to facilitate the development of personalised care strategies that promote attachment skills and improve stress management.

An increased focus on fostering secure attachments in childhood and understanding the underlying neurobiological processes offers new opportunities to strengthen psychological resilience and emotional health across the lifespan.

RESEARCH METHODOLOGY

The research methodology for this article was based on a systematic literature review aimed at gaining comprehensive insights into the interactions between attachment experiences and stress regulation. The

literature review followed a well-defined methodology that focused on selecting and analyzing academic publications that investigate the relationships between early childhood attachment experiences and physiological stress responses.

Methodology of the literature review:

1. Search strategy: Leading scientific databases such as PubMed, PsycINFO and Google Scholar were searched to identify relevant literature. The search terms included combinations of “attachment theory”, “stress regulation”, “cortisol”, “oxytocin”, “prefrontal cortex”, “limbic system” and similar terminological variations.
2. Inclusion criteria: Studies and literature were included that provide empirical data on the effects of attachment experiences on stress regulation, as well as reviews that present theoretical models or summaries of existing research findings. Particular emphasis was placed on papers that combined neuroscientific approaches with psychological and educational perspectives.
3. Data analysis: The selected studies were systematically analysed to extract their methods, main findings and conclusions. This information was critically analysed to provide a comprehensive picture of the current research landscape and to understand how attachment experiences shape the physiological basis of stress management.

RESULTS

The results of the literature review impressively illustrate that early attachment experiences have a decisive influence on physiological stress regulation. A large number of studies analyzed as part of this review consistently show that individuals with secure attachment have a more effective regulation of stress hormones such as cortisol compared to insecurely attached individuals:

The study by Gunnar and Quevedo (2006), which investigated the effects of attachment styles on the stress response in children, provides important insights into the biological mechanisms underlying these processes. In their research, Gunnar and Quevedo (2006) used a sample of children of different ages who were exposed to various experimentally induced stressful situations. This could be a separation experience from the carer or a cognitively challenging task. The children’s reactions were quantified by measuring the cortisol level in their saliva before and after the stressful situations. The study found that securely attached children showed a significantly faster reduction in cortisol levels after the stressful event than insecurely attached children. In securely committed children, cortisol levels normalized more quickly, indicating a more efficient activation and subsequent deactivation of the hypothalamic-pituitary-adrenal axis (HPA axis). The mechanisms underlying these processes involve several key areas of the brain that are involved in the regulation of emotions and stress (McEwen 2013):

1. Prefrontal cortex: The prefrontal cortex (PFC) plays a crucial role in the regulation of the HPA axis, particularly in the assessment of stressors and the initiation of appropriate responses. In securely attached children, the PFC is better able to modulate the stress response by more effectively controlling the activity of the amygdala, a key center for emotional responses.
2. Amygdala: The amygdala is significantly involved in processing emotional stimuli and triggering stress responses. Studies such as this one have shown that secure attachment is associated with a less reactive amygdala in stressful situations, suggesting that securely attached children are less emotionally vulnerable to potential threats.
3. Hippocampus: The hippocampus is important for providing feedback to the HPA axis to terminate the stress response. It helps to assess and store information about stressors and plays a role in inhibiting cortisol production after the stressor has ended. In securely attached children, a well-functioning hippocampus supports a rapid return to normal cortisol production and promotes long-term stress resilience.

The findings of Gunnar and Quevedo (2006) emphasize the importance of secure attachment for the development of effective coping skills. This study contributes to the understanding of how early childhood experiences influence neurobiological development and lay the foundation for coping with psychological stress later in life.

Another striking example is provided by a research study by Sroufe et al. (2009). In their longitudinal study, Sroufe et al. (2009) comprehensively investigated the long-term effects of secure attachment

experiences on stress regulation and emotional development. In this research, children were followed from early childhood to adolescence to observe the development of their emotional and physiological responses to stress. The study started with a group of children aged five years who grew up in a care environment classified as supportive. This environment was defined by the emotional availability and responsiveness of the carers, which is considered an indicator of secure attachment. When the children were ten years old, they were subjected to a series of stressful testing situations, such as academic exams and social challenges, while their cortisol levels were measured. The results showed that children who had experienced secure attachments in their early years had significantly fewer emotional problems at the age of ten and lower cortisol levels during the stressful tests. This suggests that secure attachment experiences have a lasting effect on the ability to cope with stress. In particular, it was observed that these children had more efficient physiological stress regulation, which was manifested in a faster return to baseline of their cortisol levels after the stressor ended. The researchers attributed these effects to increased neuronal connectivity in the prefrontal cortex and limbic system, which are crucial for emotional regulation. The prefrontal cortex, known for its role in decision-making and emotional control, and the limbic system, which includes the amygdala and the hippocampus and is directly involved in emotional processing, were strengthened in their development and function by the secure attachment experiences. This study by Sroufe et al. (2009) thus confirms that early social interactions and the quality of attachment experiences are decisive factors for the development of effective stress management strategies. Promoting secure attachments in childhood can therefore have long-term positive effects on emotional health and stress management in later life.

The scientific literature also confirms that this improved stress regulation not only persists in childhood, but also in adulthood. Adults with secure attachment histories show better emotional and hormonal adaptability in challenging life situations. A 2013 study by Hostinar et al. examined the long-term effects of secure attachment experiences from childhood on stress responses in adults. This research provides valuable insights into how early childhood social experiences influence the physiological mechanisms that respond to stress in adulthood. Hostinar et al (2013) conducted a prospective longitudinal study that followed participants from early childhood into adulthood. The study measured participants' cortisol levels in response to standardized stress tasks to assess the efficiency of their stress-related hormone regulation. The researchers grouped participants based on the quality of attachment they had experienced in childhood with their primary caregivers, distinguishing secure and insecure attachments. The results showed that adults who had experienced secure attachments as children produced significantly less cortisol in response to stress compared to those with insecure attachment experiences. They also returned to their baseline hormonal states more quickly after stressful events. These findings also strongly suggest that secure attachment in childhood is associated with more effective regulation of the endocrine system in adulthood, which improves stress management.

The authors of the study explain that the improved stress regulation in securely attached adults is mediated by a more efficient function of the hypothalamic-pituitary-adrenal (HPA) axis. Secure attachment may lead to optimised neural development during critical developmental periods in childhood, which promotes a healthier response of the HPA system to stress later in life. This includes improved feedback regulation between the amygdala, hippocampus and prefrontal cortex, which work together to modulate HPA axis activity (Hostinar et al. 2013).

CONCLUSION

Summarizing the results of the studies on the impact of early attachment experiences on stress regulation highlights the critical role of attachment security in the development of physiological stress coping mechanisms. Secure attachment promotes efficient regulation of stress hormones such as cortisol and supports the synthesis of oxytocin, which is essential for emotional well-being and stress resilience (Rass 2017).

Studies such as those by Gunnar and Quevedo (2006) and Sroufe et al. (2009) illustrate that securely attached children experience a faster normalization of cortisol levels after stressful events, an indicator of effective activation and deactivation of the HPA axis. This is supported by increased neuronal connectivity in the prefrontal cortex and limbic system, which according to McEwen (2013) are essential for emotional

regulation. In addition, research by Hostinar et al. (2013) shows that these effects persist into adulthood and provide a stable basis for long-term emotional health and stress management.

Interdisciplinary research emphasizes that oxytocin, often referred to as the 'bonding hormone', also plays a key role in this dynamic. Secure attachment in childhood leads not only to an adaptive cortisol response, but also to increased levels of oxytocin, which promotes social bonding and stress reduction (Gunnar & Quevedo 2006). These hormones work together to create a robust network for emotional stability and stress resilience that accompanies individuals through all stages of life

The latest research reveals that secure attachment experiences are not only desirable but essential for the development of effective stress coping mechanisms. Yet despite this clear evidence, as comprehensively outlined by Bowlby (1969), many educational systems still seem reluctant to integrate such crucial findings into their practices. The need to implement early childhood interventions to promote secure attachments is unequivocally emphasized by science. These interventions could have profound long-term positive effects on physiological and emotional health. So why is pedagogy lagging behind this body of knowledge? Siegel (2012) stresses that educational institutions and care programs need to acknowledge the scientific evidence and proactively develop programs that realize these life-changing benefits. Only by embedding these biologically based insights into everyday educational practice can we hope to raise future generations to be more resilient and emotionally healthy individuals.

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КАК ПРИВЪРЗАНОСТТА КОНТРОЛИРА НИВАТА НА СТРЕС: ПОГЛЕД ВЪРХУ ИЗСЛЕДВАНИЯ НА МОЗЪКА

Резюме: Този систематичен литературен преглед подчертава формиращите ефекти на преживяванията на привързаност в ранното детство върху регулирането на стреса и физиологичната адаптивност в по-късен етап от живота. Нашият анализ на проучвания от водещи научни бази данни подчертава, че лицата със сигурна история на привързаност показват по-ефективна регулация на кортизола и по-бързо възстановяване на изходните нива на хормоните на стреса. Статията разкрива невробиологичните механизми, които са в основата на тези процеси, по-специално функциите на префронталната кора, амигдалата и хипокампуса при обработката на емоциите и стреса. Допълнителни констатации показват, че ползите от сигурната привързаност се запазват и в зряла възраст. Тези прозрения подчертават спешната необходимост от разработване на образователни практики, основани на биологични доказателства, които да насърчават ефективни стратегии за справяне със стреса още от детството и по този начин да укрепват емоционалното и психичното здраве в дългосрочен план.

Ключови думи: *преживявания, свързани с връзката, регулиране на стреса, регулиране на кортизола, невробиологични механизми, ранно детско развитие*

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INTRODUCTION TO TRAFFIC PSYCHOLOGY AND INDIVIDUALLY SELECTED
TRAFFIC PSYCHOLOGY TOPICS

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Abstract: Fastenmeier and Gstalter (2021, p. 8) describe traffic psychology as the science of the behavior of road users. In summary, traffic psychology is an application-oriented discipline. It attempts to transfer the basic findings of psychology to mobility and road traffic (Fastenmeier & Gstalter 2021). Current research topics in traffic psychology include, among others, distraction in traffic, aggression in traffic, and for example the special group of older road users. Discussions often take place about older road users as a high-risk group. According to current studies, for instance, age alone does not justify doubts about driving ability (Fastenmeier & Gstalter 2021, p. 165). However, when the actual mileage is taken into account and a distinction is made between frequent and infrequent drivers, a different picture emerges. Irrespective of age, infrequent drivers who cover less than 3,000 kilometers a year have a significantly higher accident risk than frequent drivers who cover more than 3,000 kilometers a year. Among frequent drivers, senior citizens have the lowest accident risk. On the other hand, senior citizens aged 75 and over, who drive less than 3,000 kilometers annually, have an elevated risk of accidents.

Keywords: Traffic psychology, distraction in traffic, aggression in traffic, older road users

INTRODUCTION

“Traffic psychology is concerned with the experience and behavior of people in traffic, transportation, and mobility systems and the underlying psychological processes” (Vollrath & Krems 2011, p. 14). Traffic psychology has a long scientific tradition and is one of the oldest psychological disciplines. Some of the first empirical studies in psychology dealt with traffic-related issues (Münsterberg 1913). Since then, traffic psychology in German-speaking countries has focused on the diagnosis, counseling, rehabilitation, and retraining of drivers with driving problems. A small area of research and practice focuses on mobility, behavior in road traffic, road safety, vehicle and road environment design. Overall, this is an interdisciplinary field, an innovative research area with its own methodology and theoretical approaches. It is therefore worth considering a more detailed definition:

“Traffic Psychology can be understood as a cross-sectional discipline of general and applied psychology with strong links to industrial and engineering psychology. Its cognitive interest is fundamental, application-oriented, and thus practice-oriented. The focus is on the experience and behavior of people in traffic and transportation systems and the underlying psychological processes. It is an innovative research field with its own methodology and theoretical approaches. From the beginning it has had a strong interdisciplinary orientation. In particular, there are points of contact with engineering, medicine, and law” (Fastenmeier 2019). Overall, traffic psychology is therefore an applied discipline, as it aims to “apply the basic findings of psychology to transportation and mobility” (Fastenmeier 2019). In short, Fastenmeier and Gstalter (2021, p. 8) describe traffic psychology as the science of the experience and behavior of road users.

RESEARCH METHODOLOGY

Fields of Traffic Psychology

The domains of activity in transportation psychology are very diverse and can be roughly divided into three areas. These are based on the subfields of occupational psychology:

1. analysis and evaluation of people, activities, and the transportation environment
2. implementation in design, intervention and development
3. analysis, design and intervention with regard to the effects and consequences of the transport system.

To answer traffic-psychological questions, e.g. how often road users are distracted by smartphones and how dangerous this is, different research-methodological approaches are used: surveys, interviews, observations, simulator and laboratory studies, naturalistic driving behavior observations, as well as accident statistics.

The research methodology will principally consist of selected descriptive case studies from the practical work of assessment in the field of traffic psychology. For this purpose, interviews will be conducted, transcribed, and then evaluated and interpreted using qualitative content analysis according to Mayring (2015). Seven individual cases from the daily work of traffic psychology were selected, which are intended to illustrate the various facets of aggressive behavior in traffic.

RESULTS

Individually Selected Traffic Psychology Topics

A primary responsibility of traffic psychologists is to analyze traffic behavior. The subsequent section, therefore, will provide a comprehensive overview of individually selected traffic psychology topics.

Distraction in traffic

Distraction is an often underestimated source of danger in traffic. Active participation in road traffic, whether as a cyclist, pedestrian or driver, requires full concentration and attention at all times. A brief moment of inattention can lead to risky driving, dangerous traffic situations or even accidents. Distractions can come in many forms: visual, auditory, physical, and cognitive: reading a text message, for example, involves elements of visual, cognitive and physical distraction. The consequences can be poorer vehicle control, delayed reactions and less attention to relevant visual information, e.g. missing important information due to too short a look at the road, narrowing of the field of vision and increased mental stress. People often try in vain to compensate for the effects of distraction by driving more slowly.

Aggressive behavior in traffic

The atmosphere on the roads is often characterized by tension and hostility. Headlines such as these are frequently reported in the media. Aggressive behavior can manifest in various forms, including jostling, tailgating, and flashing lights. This phenomenon appears to be pervasive in daily life. To develop a scientific approach to understanding and addressing aggressive behavior in road traffic, it is essential to address the following questions: What is the definition of aggressive behavior? What is the prevalence of aggressive behavior in road traffic? What measures can be taken to reduce aggression?

Definition of aggression in traffic

Aggressive behavior can be conceptualized as a motivation to inflict physical or psychological harm upon objects or individuals. The current emotional state and triggers of aggression can play a role in this. Herzberg and Schlag (2006) proposed a two-type taxonomy of aggression in road traffic: instrumental aggression, defined as a form of aggressive behavior that entails the acceptance of harm, and affective aggression, characterized as hostile behavior aimed at deliberately inflicting harm on others. Notably, the scientific community has yet to reach a consensus on a unified definition of aggressive behavior.

A more neutral term is “traffic climate”, which refers to how road users perceive and evaluate interactions in road traffic. This concept focuses not only on negative aspects, but also on positive interactions (e.g., considerate behavior) (Holte 2021).

There is no reliable data on the extent of aggressive behavior in road traffic and its risk potential. Reports of an increase in aggression may be influenced by media coverage and public awareness, not necessarily reflecting actual changes. Regular surveys on the traffic climate provide more useful information for road safety work.

What causes aggressive behavior in traffic?

The etiology of aggressive behavior in the context of road traffic is multifaceted, with the primary causes attributable to either individual characteristics or situational factors (Klimmt et al. 2014). Among

the individual-level factors, gender and age have been demonstrated to influence aggression in road traffic. Specifically, young men exhibit a higher propensity for aggressive behavior compared to female and older road users. Furthermore, personality traits such as carelessness, anger, impulsiveness, and a narcissistic personality structure have been identified as contributing factors to aggression. The willingness to act aggressively can be heightened by strong negative feelings, such as anger or rage. Additionally, a lack of impulse control and empathy have been identified as significant contributors to aggressive behavior.

Furthermore, an aggressive and confrontational approach to stress has been shown to be associated with an increased frequency of traffic violations and a higher probability of involvement in accidents (Evers 2009). However, it is not yet possible to directly determine how often aggressive driving is the cause of an accident.

Older road users

The increasing number of older road users has brought with it a challenge for society: ensuring their safe mobility for as long as possible (Fastenmeier & Gstalter 2021, p. 149). This project is very important because it helps people be more active in their communities and improves their lives. When thinking about stopping to drive and having mandatory fitness-for-driving tests based on age, it is important to consider how this might affect the quality of life of the elderly. For instance, research has shown that older people who stop driving report a decrease in the frequency of trips, an increase in depressive symptoms, and a decline in cognitive abilities and physical functioning. In view of these results, it is important to prioritize maintaining older adults' ability to drive, while emphasizing the importance of road safety. It is also noteworthy that older adults are increasingly cycling and walking, underscoring the need for comprehensive strategies that address the interplay between mobility, age, and road safety.

Accident analysis

The investigation of accident statistics reveals that older road users are involved in a significantly lower number of accidents when compared to other age demographics. The risk of being involved in an accident, as measured by accidents per kilometer driven per year, is comparable to that of individuals between the ages of 25 and 29. However, when the risk of fatality is considered, it is analogous to that of individuals between the ages of 21 and 24. However, this risk remains significantly lower than that observed among the particularly vulnerable 18 to 20-year-olds. The heightened risk of fatality in accidents can be attributed, at least in part, to the increased vulnerability of older individuals, a phenomenon referred to as the "frailty bias". A distinction can be made between two groups: those who drive less and those who drive more. Notably, infrequent drivers, defined as those who travel less than 3,000 kilometers annually, exhibit a considerably elevated mileage-related accident risk in comparison to frequent drivers, who travel more than 3,000 kilometers per year. Among frequent drivers, senior citizens demonstrate the lowest accident risk. The heightened accident risk observed among senior citizens is confined to infrequent drivers, particularly those aged 75 and above. The reduced mileage among older drivers is primarily attributable to alterations in driving habits, such as the transition to retirement and the potential decline in performance resulting from illness or advanced age.

Loss and compensation of performance

Aspects of cognitive performance demonstrate a tendency to decline with age. Sensory abilities are often reported to be reduced by older people, including reduced contrast perception, slowed dark adaptation, increased sensitivity to glare, and a slowed speed of accommodation. Cognitive functions are often impaired by older people, including the efficiency of the usable field of vision, information processing speed, the fading out of irrelevant stimuli, the switching of attention between tasks, and the estimation of speed. Motor skills are also impacted, manifesting as reduced speed and limited mobility of the cervical spine. A significant challenge for many older individuals is the processing of complex traffic scenarios. The leading causes of accidents involving older individuals include failure to yield at intersections, incorrect lane changes, and improper turns or lane changes. As individuals age, the probability of developing medical conditions also rises, frequently necessitating medication. These changes can have a detrimental effect on

road safety. However, it is crucial to note that the decline in performance cannot be regarded as affecting all areas of functioning, nor as a universal decline in abilities that affects all individuals. Consequently, chronological age alone is not a reliable predictor of an older individual's performance and accident risk. Instead, it is the correlation between age-related deficits and often gradual illnesses that lead to an increased safety risk in traffic.

Another theoretical framework pertains to the concept of selective optimization through compensation (SOC), proposed by Baltes and Baltes (1989). This model elucidates a process of effective adaptation to the challenges associated with the aging process. The SOC model is predicated on the life-span concept, which posits the occurrence of gains and losses during the course of aging. In the SOC model, the concepts of aging and success are not regarded as mutually exclusive. The prevailing cultural narrative often portrays aging as a period of decline, marked by losses and limitations, while youth is often associated with upward mobility, success, and gains. According to Baltes and Baltes (1989), reserves and resources are present in old age and can be further developed. The SOC model posits three central adaptation processes: selection (choosing, focusing), optimization (practicing, training), and compensation (tricking, balancing). These processes will be elaborated upon using a practical example. The pianist Arthur Rubinstein, who demonstrated the capacity to perform his piano compositions with a seemingly consistent level of proficiency, irrespective of his age. This ability was attributed to the implementation of specific strategies: he curated his performance repertoire to encompass a select number of pieces (selection), he engaged in more intensive and focused practice regimens for the remaining pieces (optimization), and he strategically played passages that were followed by faster passages more slowly, thereby creating the perception of increased speed (compensation).

In general, older adults tend to compensate for existing deficits, which involves adapting to age- or illness-related performance declines and adjusting their behavior accordingly. This may include reducing driving frequency, avoiding rush hour, and driving more slowly. The loss of performance due to age and illness increases the risk of accidents if adequate compensatory measures are not in place. The prerequisites for adequately compensating for reduced performance include recognizing and accepting one's own deficits, correctly assessing one's own fitness to drive, and knowing alternative forms of mobility.

Possible measures to improve road safety

A mandatory fitness test for older car drivers over a certain chronological age cannot be justified on the basis of accident figures and scientific findings, as the benefits of such tests, which are already carried out in many countries, have not yet been proven. Strict measures mean that senior citizens increasingly participate in traffic as cyclists or pedestrians and are therefore less protected than in a car. This can have the effect of increasing the risk of accidents for older people.

There do not appear to be any individual personal or biographical characteristics of older drivers that could be used to predict an increased risk of accidents. Nor do medical tests and results of psychometric performance tests allow any predictions to be made about this, as there is a lack of scientific evidence for a criterion-valid prediction of the practical driving competence of older drivers based on test results.

If an older person's driving competence is in question, a driving behavior observation drive is currently considered the gold standard and therefore the best method to check driving fitness. A supplementary practical driving test as part of a driving behavior observation test is therefore often recommended to further check the driver's ability to compensate. This can then be used to check whether any psycho-physical performance deficits identified by the test psychologist can be compensated for by a careful and experienced driving style when participating in real road traffic.

CONCLUSION

Future strategies for improving the road safety of older people should not only focus on their performance deficits, but above all on their individual safety potential. These include: Compensatory behavior, experience, safety-related attitudes, greater safety awareness, ability to learn.

Approaches to improving the road safety of older road users include, for example Targeted advice and voluntary health checks by doctors, for example, offering voluntary driver training, providing tools for better self-assessment ("self-test"), better labeling of potential impairment due to medication, reducing

mobility requirements, for example, removing barriers, finding simple solutions in traffic planning and control, support through driver assistance systems.

The active mobility of senior citizens as cyclists and pedestrians should also be strengthened. Here, training programs can help senior citizens to “dare” to get on their bikes or feel safer as pedestrians. However, the traffic environment should also be designed in such a way that senior citizens can move around safely (e.g. sufficiently long green phases at traffic lights, safe crossing points, wide cycle paths).

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ВЪВЕДЕНИЕ В ПСИХОЛОГИЯ НА УЧАСТНИЦИТЕ В ТРАФИКА И ОТДЕЛНО ИЗБРАНИ ТЕМИ ОТ ПСИХОЛОГИЯТА НА УЧАСТНИЦИТЕ В ТРАФИКА

Резюме: „Психологията на движението се занимава с преживяванията и поведението на хората в системите за движение, транспорт и мобилност, както и с лежащите в основата им психологически процеси“ (Vollrath & Krems 2011, с. 14). Fastenmeier и Gstalter (2021, с. 8) описват психологията на движението като наука за поведението на участниците в движението. В обобщение, психологията на движението е дисциплина, ориентирана към приложение. Тя се опитва да пренесе основните открития на психологията към мобилността и пътното движение (Fastenmeier & Gstalter 2021). Актуалните изследователски теми в психологията на пътното движение включват, наред с другото, разсейването в пътното движение, агресията в пътното движение и например специалната група на по-възрастните участници в движението. Често се водят дискусии за по-възрастните участници в движението като високорискова група. Според актуални проучвания например възрастта сама по себе си не оправдава съмненията относно способността за шофиране (Fastenmeier & Gstalter 2021, с. 165).

Ключови думи: психология на движението, разсейване на вниманието в движението, агресия в движението, по-възрастни участници в движението

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РОЛЯТА НА НЕПРАВИТЕЛСТВЕНИТЕ ОРГАНИЗАЦИИ (НПО) В БЪЛГАРИЯ ЗА СЪВРЕМЕННОТО ОБЩЕСТВЕНО-ИКОНОМИЧЕСКО РАЗВИТИЕ

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Резюме: В тази разработка е направен обзор на гражданския сектор в България, като са използвани обобщени данни от различни аспекти в дейността на неправителствените организации в контекста на развитието на гражданското общество в България. Изследването е посветено на актуален и значим проблем. Важността на нестопанските организации за социално-икономическия живот се повишава, което предпоставя необходимостта от оценка и анализ на тяхното представяне. Дейността им обаче не е свързана с постигането на икономическа изгода, а с позитивно въздействие за обществото. Тази особеност обуславя стремежа на нестопанските организации да изразходват своите ресурси ефикасно и ефективно. Извършен е анализ на НПО като сложно социално явление чрез определяне на оптималните връзки в „третия сектор“.

Ключови думи: НПО, икономика, развитие, гражданско общество, история

УВОД

Приоритетите, реалностите и постиженията на неправителствените организации (НПО) в България преживяват съществени промени през последните години. Това изследване предоставя информация за дейността, за силните и слабите страни на НПО сектора, както и препоръки за неговото бъдеще.

Фокусът на изследването е върху ролята на НПО в процеса на развитие на България. Направен е задълбочен преглед и оценка на ресурсите на НПО сектора за изпълнение на неговите задачи, както и анализ на бъдещите предизвикателства и възможности за устойчивото развитие на НПО сектора в България.

Голямо предизвикателство за НПО е неефективността и корупцията в държавните институции. Социалната политика се явява като следващ приоритет за НПО. Те смятат, че групите, които страдат най-много от правителствените политики, са младите хора, които развиват т.нар. „култура на емиграция“, както и малцинствата.

Съществуват ценности и концепции, свързани с ориентирано към хората развитие, но те се проявяват по-скоро като настроения и нагласи, отколкото като ясно дефинирани стратегии за развитие.

Важно заключение от този преглед е, че държавата преодолява своето негативно отношение към НПО и е започнала да ги използва като източник на експертиза, която допълва съществуващите в правителството. Приносът, който държавата търси от тях, е да предават посланията на правителството на целевите си групи.

Казаното дотук показва, че секторът се е утвърдил като алтернатива и партньор на държавата.

1. Теоретико-методологични рамки на НПО

В последните десетилетия икономиката и технологиите се развиват с високи темпове. Създават се условия за възникване и задълбочаване на социалното неравенство и несправедливостта, както и на различни проблеми в сферите на екологията, здравеопазването, достъпа до образование. Обикновено предприетите мерки са неефективни и ненавременни. При оползотворяването на ресурсите е налице ниска ефикасност и липса на прозрачност.

В тази действителност възниква необходимостта от съществуването на формирания, които да допринесат за решаването на посочените проблеми. В съвременните условия организациите с нестопанска цел¹ имат специфично място и роля в социално-икономическия живот. Те извършват своята дейност в т.нар. „трети сектор“² (отделен от частния и публичния) и се утвърждават като алтернативен доставчик на обществени блага. Според поддържания от Агенцията по вписванията Търговски регистър и регистър на юридическите лица с нестопанска цел (ЮЛНЦ) в България има регистрирани над 26 хил. НПО, от които над 70% са сдружения.

Приоритизирането на устойчивото развитие в световен план предоставя на нестопанските организации повече възможности да постигат позитивно социално въздействие. То от своя страна допринася за нарастването на значението им за обществото.

НПО са основните субекти на гражданското общество, чрез които то съществува и функционира. Свидетелствата за първообрази на НПО датират от преди новата ера. Но бурното им развитие и повишаването на степента им на организираност започват едва в средата на миналия век. В условията на планова икономика България изостава от световните тенденции. Затова динамичните процеси при нестопанските организации у нас протичат основно в края на XX в. и началото на XXI в. Тези формирания са все още относително нов и недостатъчно изследван субект. Те са в начален стадий на своето развитие, но вече са утвърдили ключовата си роля.

Съществен принос за развитието на нестопанските организации се явява присъединяването на България към Европейския съюз. То увеличава достъпа до ресурси и улеснява международните партньорства. От своя страна това допринася за изграждането на капацитет и повишаването на устойчивостта.

Нестопанските организации не се стремят към печалба, а към постигане на позитивно социално въздействие. За да максимизират положителния ефект за обществото, организациите следва да управляват своите ресурси ефикасно, ефективно и прозрачно. Такова управление се явява и конкурентно предимство, чрез което се привличат донори. В публикацията синонимно се използват понятията дарители, спонсори и донори. Това са лицата, които осигуряват средства на нестопанските организации чрез предоставянето на финансиране.

Съществуват няколко фактора, които пречат на ефективността на НПО сектора, като: ограничено участие, неустойчивост, липса на солидарност и свързаност в рамките на сектора, както и корупция, особено по отношение на разпределението на фондовете от ЕС.

Основните функции, които НПО изпълняват, могат да бъдат класифицирани в различни категории. По-долу са представени някои от присъщите им функции, които не изчерпват всички насоки на тяхната дейност, но могат да ни помогнат по-добре да разберем тяхната същност и сфери на действие и влияние:

- *Компенсираща* – стимулиране и насочване на гражданската енергия при преодоляване на недоразвитостта на социалната инфраструктура.

- *Масовизираща* – води до приобщаване към ценностите на гражданското общество на възможно най-голям брой субекти с цел разширяване и управление на гражданското пространство.

- *Информационно-комуникативна*:

- изява на различни убеждения;

- предоставяне на услуги, свързани с внасяне на промени на личността и обществото.

- *Социално-благотворителна и подпомагаща функция*.

- *Съхраняваща* – запазване и развитие на националните традиции.

Тези основни функции на НПО формират **целите**, които преследват отделните организации. Целите от своя страна предопределят насоките на действие, както и резултатите, които се опитват да постигнат, тяхната обществена значимост и социално предназначение.

2. Развитие на НПО

По света има над 10 милиона неправителствени организации³, които, ако бяха отделени в самостоятелна държава, ще образуват петата най-развита икономика⁴.

Неправителствените организации играят ключова роля във формирането и прилагането на

демократичните принципи в обществото. Техният авторитет произтича от отговорната и градивна роля, която играят. Независимостта е едно от основните и съществени свойства на НПО. За работата на една НПО е важно намирането на партньори и съмишленици при реализиране на нейните цели.

НПО започват да играят все по-важна роля в процесите на управление. Затова изучаването на ролята и значението на неправителствените организации е необходимост за съвременната наука. По-голямата част от тях са създадени за решаване на конкретни проблеми или работят в рамките на конкретен проблем. Днес тези организации активно се занимават с въпроси, свързани с предоставянето на хуманитарна помощ, защитата на човешките права и опазването на околната среда, осигуряването на мир и сигурност, участват в образователни програми и спортни проекти. Те предоставят анализ и експертна оценка на различни, включително глобални проблеми, действат като механизъм за „ранно предупреждение“ и допринасят за наблюдение изпълнението на задълженията на участниците по различни споразумения.

Но въпреки положителната роля на НПО в тяхната дейност има определени проблеми. Основните заключения относно ресурсите на сектора показват, че значителна част от интелектуалния и експертен потенциал на страната е концентриран в НПО. Информацията и знанията, генерирани в сектора, са силен ресурс. Въпреки това държавата продължава да бъде безразлична към ресурсните нужди на НПО. Безспорен факт е, че човешките ресурси на НПО сектора са недостатъчни, като повечето НПО наемат до пет души. Затова се отдава голямо значение на партньорствата като ценен ресурс. Относно качествените характеристики на човешките ресурси на сектора най-важни са: високата мотивация, образованието и високата експертиза.

Сред нематериалните ресурси за изключително важна в сектора се счита информацията. Добрата репутация също се счита за важна, като НПО често се асоциират с независимост, обществено благо, помощ, благотворителност и т.н. Гъвкавостта и уникалността са едни от най-важните качествени аспекти на нематериалните ресурси.

За бъдещата устойчивост на НПО сектора е необходимо създаването на стратегическа рамка за устойчивост на НПО, основана на три мерки: **ефективност** (устойчиво развитие), **продължителност** (чрез продължаващи дейности) и **самостоятелност** (чрез самостоятелни институции). Фактори, които възпрепятстват устойчивостта, са, че НПО секторът не е структуриран, липсват средства за вътрешна комуникация и обмен на информация. За да има ясна идентичност и положителен имидж, секторът трябва да насочи усилията си към привличане на масова подкрепа от обществеността.

Много важен фактор за успешното функциониране на НПО е партньорството с държавните институции. Основната цел на държавната подкрепа за неправителствените организации е формирането на нов модел на отношения при прилагането на социалната политика, предоставяне на ефективна помощ на социално ориентирани неправителствени организации чрез активно сътрудничество с тях, включването им в решаването на социално значими проблеми, предоставяне на информационна, консултативна, методическа, организационна и техническа подкрепа, както и помощ чрез държавни социални поръчки.

НПО исторически са имали проблеми с финансовата подкрепа заради липсата на разбиране за тяхната полезност. В България те имат някои възможности за успешно развитие и обществена подкрепа, които трябва да се използват:

✓ **Печеливши дейности:** НПО имат възможност да участват в печеливши дейности, които могат да осигурят ценни ресурси за тяхната устойчивост. Тези дейности ще позволят на НПО да бъдат финансово независими между проектите и да генерират собствено финансиране. Участието в обществени поръчки е друг възможен източник на доходи, въпреки че в момента има малко поръчки, в които НПО могат да участват поради спецификата на тяхната дейност. Очаква се броят на такива поръчки да нараства, особено за консултантски услуги като оценка на въздействието върху околната среда и медийни стратегии.

✓ **Предоставяне на социални услуги:** с последните изменения в **Закона за социалното подпомагане** общините са задължени да провеждат конкурси за предоставяне на социални услуги, в които НПО могат да участват. Тази практика е добре развита в Западна Европа и някои източноевропейски страни като Полша. Въпреки че в България тази практика е все още в началото

си, тя представлява важна възможност за НПО да предоставят услуги и да получават финансиране в замяна.

✓ **Дарителско финансиране и данъчни облекчения за дарения:** България предлага сравнително щедри данъчни облекчения за дарения (отстъпка до 10% от годишния приход), което може да бъде възможност за НПО да събират средства. Въпреки това дарителската култура в България е слабо развита и НПО получават само малка част от общите дарения. НПО трябва да провокират общественото съзнание за ползите от даряването и активно да промотират въздействието на своята работа.

✓ **Финансиране от ЕС:** европейските фондове и програми представляват нарастващ източник на финансиране за българските НПО. С улесняване на достъпа до тези механизми НПО трябва да увеличат своето разбиране за тези възможности за финансиране, като гарантират, че могат ефективно да кандидатстват за тях и да управляват тези ресурси.

Текущото изследване предлага добра отправна точка за по-дълбока и по-систематична дискусия относно устойчивостта на българските НПО. Ще е необходимо допълнително изследване и обсъждане, за да се подкрепят усилията и да се помогне на сектора да стане по-осведомен за важността на устойчивостта във всичките ѝ три аспекта – ефективност, продължителност и самостоятелност, за успешното развитие на България в краткосрочен и дългосрочен план.

3. Социални функции на НПО

Правна среда на сектора на НПО в България

НПО в България оперират в рамките на правната структура, дефинирана от **Закона за юридическите лица с нестопанска цел** (ЗЮЛНЦ). Изпълнителната власт има ограничени правомощия да се намесва в дейността на фондациите. Законът позволява производствена дейност за НПО, но с ясни ограничения: тези дейности трябва да бъдат допълнителни и свързани с основната (некомерсиална) дейност на организацията, а приходите трябва да се използват за постигане на нестопанските цели.

Фондацията се различава от сдружението, тъй като няма членове и се управлява чрез решения на основателя.

Регистрации и административни изисквания

Освен съдебната регистрация, НПО трябва да преминат през няколко допълнителни административни процедури, включително:

1. Регистрация в BULSTAT: Единен идентификационен номер за юридически лица.
2. Данъчна регистрация: НПО трябва да се регистрират в местната данъчна дирекция по място на седалището.
3. Социално осигуряване: НПО с нает персонал трябва да се регистрират в Националния осигурителен институт.
4. Противодействие на изпирането на пари: НПО трябва да приемат вътрешни правила за предотвратяване на пране на пари и финансиране на тероризъм, които се регистрират във Финансовото разузнаване.
5. Защита на лични данни: НПО, които събират личните данни, трябва да се регистрират в Комисията за защита на лични данни.

Въпреки че тези регистрации са стандартни за всички юридически лица, те въвеждат допълнителна административна тежест за НПО. Едно от предложените решения е създаването на единен регистър, който обединява всички тези административни функции, за да се улесни процесът за НПО.

ЗЮЛНЦ създава по-структурирана и прозрачна правна среда за НПО в България. Въпреки това секторът все още се сблъсква с бюрократични предизвикателства, особено по отношение на регистрационните изисквания и неяснотата относно дейностите за печалба. За да продължи да расте и да се развива, секторът се нуждае от допълнителни опростявания и изясняване на въпросите, свързани с печелившите дейности. Освен това опростяването на административните процеси и подобряването на сътрудничеството с държавата биха могли да повишат ефективността и устойчивостта на НПО в България.

4. Как НПО помагат?

Обхватът на проблемите, с които се занимават тези организации, е обширен. Те предоставят на населението необходимата помощ, а също така играят ролята на посредници. НПО насърчават включването и адаптирането в обществото на социално уязвими слоеве от населението, както и на хора със специални нужди. В трудни житейски ситуации хората могат да получат помощ от тези организации. НПО помагат със специализирана социална рехабилитация на хора, която е насочена към подобряване на техните комуникации и включване в обществото. Неправителствените организации също имат принос в превенцията на заболяванията.

Важно е да се отбележи, че според териториалния обхват на дейност процентно НПО се разпределят както следва:

- Местен – 19%;
- Регионален – 46%;
- Национален – 24%;
- Международен – 11%.

Функциите на НПО в социалната сфера могат да бъдат разпределени в следните направления:

- промяна на менталитета на хората при оценката на отговорностите на държавата и гражданите по въпросите на социалната защита и социалните гаранции;
- насърчаване на съзнателни, балансирани действия за самостоятелно решаване на проблеми и отхвърляне на изчаквателна, пасивна позиция;
- облекчаване на социалното напрежение в обществото;
- преразпределение на отговорността за решаване на социални проблеми между държавата и обществото;
- запознаване на хората с възможности за самопомощ и взаимопомощ;
- формиране на активна жизнена позиция сред населението;
- повишаване на правната грамотност и обучение на хората за прилагане на законите на практика;
- осъзнаване от населението на техните права и придобиване на умения за тяхното осъществяване;
- привличане на извънбюджетни средства за социални проекти (основно от чужди източници);
- фокус върху най-належащите социални проблеми в конкретен регион, в конкретно населено място;
- разясняване на населението на същността и целите на социалните реформи и трансформации, извършвани от властите;
- упражняване на обществен контрол върху ефективността на управлението.

За да увеличат шансовете си за устойчивост, българските НПО трябва да се съсредоточат върху няколко ключови области:

➤ **Подобряване на имиджа и доверието на обществеността:** НПО трябва да работят по подобряване на имиджа си, за да изградят обществено доверие. По-добрият имидж ще увеличи доверието на държавата и гражданите, като направи НПО по-привлекателни като партньори за държавни инициативи. Доказвайки своята стойност, НПО могат да влияят върху държавната политика и да получават по-добра подкрепа за своите дейности.

➤ **Засилване на ангажимента към общността:** НПО трябва да бъдат дълбоко свързани с общността си и да отговорят на конкретните нужди на хората. Ако НПО могат да докажат, че реално решават проблеми, те ще могат да получат подкрепа, включително финансова, от общността.

➤ **Предоставяне на обществени услуги и партньорства с държавата:** НПО трябва да поемат повече отговорности за предоставянето на обществени услуги, особено в области като социална помощ, образование и здравеопазване. Държавата трябва да бъде насърчавана да плаща за тези услуги, тъй като НПО могат да ги предоставят по-ефективно и на по-ниска цена благодарение на доброволците и непреследването на печалба. Този процес вече се развива в социалната сфера, но трябва да се насърчава и в други области на обществения живот.

➤ **Насърчаване на дарения чрез по-добър маркетинг:** за да насърчат повече дарения, НПО

трябва да се съсредоточат върху подобряване на маркетинговите си стратегии. Това включва по-добра комуникация на положителното въздействие, което даренията могат да имат. Ангажирането на обществеността и показването на конкретните ефекти от даренията ще увеличи вероятността хората да даряват.

➤ **Търсене на държавна подкрепа за работата им в обществена полза:** НПО трябва да настояват за допълнителна държавна подкрепа под формата на данъчни облекчения за печеливши дейности или директна институционална подкрепа. Тази подкрепа ще помогне на НПО да развият своя капацитет за обслужване на обществени нужди, като същевременно запазват финансовата си устойчивост.

Чрез тези стъпки българските НПО могат значително да подобрят своята устойчивост и ефективност, позиционирайки се като ключови партньори както в публичния, така и в частния сектор.

ИЗВОДИ

Обобщавайки гореизложеното, могат да бъдат направени следните изводи, заради които НПО са жизненоважни за всяко демократично гражданско общество, в това число и за България:

1. Днес има много убедителни примери за ефективната общественополезна работа на неправителствените организации. С развитието на гражданското общество трябва да бъдат осигурени социалното благополучие и социалната стабилност. Това е взаимен процес, в който обществената инициатива трябва да се използва в интерес на обществото. Нито държавата, нито НПО могат да бъдат самодостатъчни независимо един от друг.

2. Потенциалът на неправителствения сектор е очевиден, но за съжаление, властите все още не го използват пълноценно за успеха на извършваната работа, за спечелване на доверието на населението, за изпълнение на своя мандат. Има нужда от развитието на мрежа от НПО в цялата страна. Колкото повече обществени организации са създадени за справяне със социалните проблеми в обществото, толкова по-слаб ще е натискът върху властите по тези въпроси и толкова по-успешен ще е пътят към постигане на социален мир в страната като цяло.

3. През последните години значително се разшири наборът от форми и методи за взаимодействие между държавата и НПО, като: участие в работата на консултативни и съветателни органи, обществени изслушвания, граждански форуми, подаване на жалби, предложения, механизми за обществен контрол, експертно участие на НПО в оценката на държавните програми и качеството на публичните услуги, система за безвъзмездно финансиране на проекти на НПО и др.

4. Днес неправителствените организации са основен партньор в реализирането на много общественозначими инициативи. Особено търсени сред населението са проекти в области като: подкрепа за социално уязвими слоеве от населението, подкрепа на детски инициативи, укрепване на обществената хармония и националното единство, постигане на цели в областта на образованието, науката и спорта, опазване здравето на гражданите.

5. Насърчаването и мотивирането на НПО не само спомага за стимулиране на тяхната работа, но подобрява живота на хиляди хора чрез формирането на активно и социално отговорно общество. Изпълнението на мащабни програми, увеличеното финансиране и подкрепата за гражданските инициативи позволяват не само да се подобри качеството на живот на населението, но и да се укрепят институциите на гражданското общество, развивайки техния потенциал и роля в решаването на социалните проблеми.

ЗАКЛЮЧЕНИЕ

Появата на съвременните неправителствени организации (НПО) е част от еволюцията на гражданското общество в демократична среда. В България развитието на НПО е отражение на социалните и политическите промени. Резултатите от институционализирането на третия сектор свидетелстват както за гражданска активност, така и за съществуващите предизвикателства и рискове за този сектор. Най-сериозната заплаха за третия сектор е процесът на „поглъщане“ на НПО, който се подхранва от два фактора. От една страна, нараства натискът от страна на висши публични служители за подкопаване на гражданската природа на НПО, подриване на тяхната функция на

контрол и използването им за политически цели. От друга страна, ръководителите на НПО често са тези, които започват корупционни практики, осигуряващи им преференциално отношение при получаване на финансиране от държавата или ЕС.

Продължаващата симбиоза между властите и бизнес сектора, както и между публичните служители и неправителствените организации води до компрометиране на автономията, целостта и институционалното развитие на третия сектор. Новите инициативи целят борба с корупцията и лошото управление на местно и национално ниво, тъй като такива корупционни практики вредят на гражданските права и интереси. В резултат на това в началото на XXI в. гражданското общество отново има възможност да се идентифицира с достойни каузи и да възстанови своите източници на легитимност.

Над всичко необходима е национална политика за развитието на гражданското общество, която да постави партньорството между институциите на държавата и НПО на приоритетно място. Тя трябва да установи нов баланс между техните права и отговорности и да осигури устойчиво финансово осигуряване. НПО и правителството трябва да работят съвместно към тези цели, като всяка страна поеме своята част от отговорностите.

Много важен елемент в развитието на НПО е саморегулацията от страна на самите организации на гражданското общество, за да се справят с риска от политическо вмешателство и търсене на печалба. НПО трябва да прилагат строги вътрешни политики и практики, които да запазят тяхната независимост от политическо влияние и да им осигурят фокусиране върху тяхната мисия, а не върху генериране на печалба. Повишената прозрачност, редовните одити и публичното отчитане могат да помогнат за изграждане на обществено доверие и за укрепване легитимността на НПО.

Фокусирането върху законодателни промени, саморегулационни практики и повишена прозрачност ще доведе до намаляване на рисковете, свързани с развитието на гражданското общество в България и до укрепване на неговата роля като независим и ефективен партньор в общественото развитие.

Важно е да се отбележи, че българските НПО имат значителен опит в работата с международни партньори, както и в страните, които ще бъдат приоритетни получатели на помощ, и в ключови тематични области на развитие. Така, международната помощ на България би могла да бъде предоставяна ефективно чрез партньорство между правителството и гражданските организации с опит в развитието.

В съвременните условия нараства необходимостта от съществуването на формиранията с идеална цел в световен мащаб и в частност в България, както и ролята и значението на НПО за локалното, националното и международното развитие.

Те могат да бъдат обобщени в следните направления:

- Ролята и мястото на организациите с идеална цел през XXI в. са да бъдат основен партньор на икономиката и на обществото;
- Секторът от организации с идеална цел може да допринесе за локалното развитие, като: дефинира нови стоки и услуги, отговарящи на специфичните нужди на хората от съответния регион; улеснява интеграцията между отделните структури и създаването на нови работни места; подобрява местната атмосфера и атрактивността на региона, в който се намира съответната организация; подпомага местните структури за постигане на по-голяма автономия; подпомага развитието на региона в дългосрочен план.

В потвърждение на тезата за повишаване ролята на организациите с идеална цел за развитието на обществото е и изводът, направен при разработката на проекта „Третата система и заетостта“: *„Дори една инициатива с идеална цел първоначално да е насочена към отделни индивиди или група хора и да е предназначена за покриване на техните индивидуални потребности, в крайна сметка „печели“ цялата общност“.*

БЕЛЕЖКИ

1. В теорията и практиката в България и по света се използват различни понятия за означаване на тези специфични субекти, сред които: неправителствени организации (НПО или NGO), организации от третия сектор, организации, чиято цел не е печалба (NPO), нестопански организации, организации с идеална цел, организации с нестопанска цел, юридически лица

с нестопанска цел, нестопански предприятия и др. Те имат близък обхват, който не е напълно идентичен. Този проблем е разглеждан в различни разработки, но не е категорично решен. Авторът използва синонимно понятията: юридически лица с нестопанска цел (ЮЛНЦ), организации с нестопанска цел (ОНЦ), нестопански организации и организации от третия сектор. Тяхното значение е ограничено до обхвата на субектите, учредени по реда на Закона за юридическите лица с нестопанска цел (ЗЮЛНЦ) – фондации и сдружения. Извън обхвата на изследването попадат изключенията от Закона – читалища и организации, които извършват политическа, синдикална или присъща на вероизповеданията дейност.

2. Понятието „трети сектор“ в контекста на сектора, в който нестопанските организации осъществяват своята дейност, не е утвърдено в България. В чужбина обаче то е широко разпространено. Авторът счита, че то следва да придобие гражданственост и у нас. Понятието се позовава на концепцията, че този сектор се явява различен от частния и от публичния, но има допирни точки с всеки от тях. Това разбиране е от ключово значение за изследването.

3. Според данни на The Global Journal.

4. По данни на Центъра за изследвания на гражданското общество към университета „Джон Хопкинс“.

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THE ROLE OF NON-GOVERNMENTAL ORGANIZATIONS (NGOs) IN BULGARIA IN MODERN SOCIO-ECONOMIC DEVELOPMENT

Abstract: This paper provides an overview of the civil sector in Bulgaria, using aggregated data from non-governmental organizations that show various aspects of the development of civil society in Bulgaria. The study is dedicated to a current and significant problem. The importance of non-profit organizations for socio-economic life is increasing, which presupposes the need to assess and analyze their performance. However, their activity is not related to achieving economic benefit, but to a positive impact on society. This feature determines the desire of non-profit organizations to spend their resources efficiently and

effectively. An analysis of NGOs as a complex social phenomenon is carried out by determining the optimal relationships in the “third sector”.

Keywords: *NGOs, economy, development, civil society, history*

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