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SZERKESZTŐSÉG ÉS KIADÓHIVATAL:
1093 Budapest, Fővám tér 8.
t: +36 1 482-5121, 482-5187
www.vezetestudomany.hu

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WORKPLACE SPIRITUALITY AND SOCIAL ENTERPRISE – A REVIEW AND RESEARCH AGENDA

MUNKAHELYI SPIRITUALITÁS ÉS TÁRSADALMI VÁLLALKOZÁSOK – ÁTTEKINTÉS ÉS KUTATÁSI IRÁNYOK

Workplace spirituality is a social movement about purposeful work that has both personal and broader societal considerations. Social enterprises are alternative organizational forms that strive to create value by simultaneously pursuing social, economic and environmental goals. Both workplace spirituality and social enterprise discourses have a value creation orientation for self and others, framed as serving and contributing towards the common good. However, only a few studies have addressed the relevance of workplace spirituality for social enterprises. Based on the literature for workplace spirituality and social enterprise, respectively, this paper argues that these phenomena have a common ground: prosocial motives, doing well (value creation) and being well (flourishing). Workplace spirituality can help preserve social enterprises' integrity, while the social enterprise context can support the incorporation of workplace spirituality to generate positive outcomes. Further studies could explore this potentiality, and the present paper provides some future research suggestions.

Keywords: **workplace spirituality, social enterprise, prosocial motives, value creation, well-being**

A munkahelyi spiritualitás az elhivatott munkával foglalkozó társadalmi mozgalom, amely egyéni és társadalmi kérdéseket is felvet. A társadalmi vállalkozások olyan alternatív szervezeti formák, amelyek a társadalmi, gazdasági és környezeti célok egyidejű megvalósításával igyekeznek értéket teremteni. Mind a munkahelyi spiritualitással, mind a társadalmi vállalkozásokkal foglalkozó szakirodalmi diskurzusra jellemző az értékteremtő elköteleződés, amelyet szolgálatként és a közjóhoz való hozzájárulásként értelmeznek. Azonban csak néhány tanulmány foglalkozott a munkahelyi spiritualitás társadalmi vállalkozásokban betöltött szerepével. A munkahelyi spiritualitás és a társadalmi vállalkozások irodalma alapján ez a cikk amellett érvel, hogy e jelenségek közös nevezőjét a proszociális indíttatás jelenti, vagyis a jót tét (értékteremtés) és a jól lét (gyarapodás). A munkahelyi spiritualitás segítheti a társadalmi vállalkozások integritásának megőrzését, míg a társadalmi vállalkozások kontextusa támogathatja a pozitív eredményeket teremtő munkahelyi spiritualitás kibontakoztatását. E lehetőség feltárása érdekében további kutatások elvégzése szükséges, amelyek irányára jelen tanulmány is javaslatot tesz.

Kulcsszavak: **munkahelyi spiritualitás, társadalmi vállalkozás, proszociális indíttatás, értékteremtés, jóllét**

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Author/Szerző:
Natasha Gjorevska, PhD student, Corvinus University of Budapest, (gjorevska.natasha@uni-corvinus.hu)

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The functioning of organizations within society and the broader environment is taking a turn towards making a positive social and environmental impact by confronting pressing issues through socially responsible and ethical products and services. The relationship between enterprises (and entrepreneurs) and society and the environment is changing, and organizations are increasingly pressured to attempt to address the world's existing sustainability problems and challenges. As a result, there has been a rise in alternative organizations because of their potential for balancing economic performance with achieving social goals. These alternative forms of organizing are known as the third sector, and include social enterprises, hybrid organizations or cooperatives, which strive to find new ways of influencing social and economic development.

This shift towards social enterprises has occurred as a response to so-called 'wicked' problems and grand challenges, such as ecological sustainability, climate change, social cohesion and food insecurity, which require alternative ways to make the world a better place (see Barney et al., 2015). This process of transformation has resulted in heightened consciousness, interrelated awareness and engagement in other-focused actions, which has in turn led to the rise in social enterprises as mutually co-creative shared value partnerships. Scholars have concurrently started to introduce and emphasize the relevance of spirituality for socially responsible entrepreneurship (e.g. Kauanui et al., 2010; Sullivan Mort et al., 2003; Ungvári-Zrínyi, 2014). More broadly, a spiritually informed perspective is seen as beneficial for the fields of management and organizational behaviour because of its potential for humanizing organizational life (Lavine et al., 2014). Although the relevance of spirituality for organizations has been recognized, the focus has predominantly been on large corporations and corporate leaders (Carette & King, 2005; Washington, 2016, in: Driscoll et al., 2019, p. 155–156).

While there have been calls for incorporating spirituality in organizational (especially corporate) life as a measure against exploitative practices, there is a body of critical work on workplace spirituality that questions its beneficial nature in the work context. For instance, Bell and Taylor (2003, p. 332) argue that, paradoxically, in aiming to warrant 'liberation from the constraints of work', workplace spirituality perpetuates these constraints by resulting in more exploitation in the name of fulfilling work. Likewise, other scholars warn against appropriation of performative workplace spirituality to harness economic goals, thus forcing spirituality to serve as a managerial/organizational tool to exploit employee resources (see Case & Gosling, 2010; Lips-Wiersma et al., 2009; Long & Driscoll, 2015; McKee et al., 2008; Oswick, 2009).

There has, however, been little research on workplace spirituality in alternative organizational forms such as social enterprises, where the intra-organizational structure, processes and ownership aspects usually stand in contrast to conventional management practices of hierarchy and control. Such an alternative context offers the possibility of disalienated work (Kociatkiewicz et al., 2020), which aligns with the spiritual perspective of self-work integration in which workers have autonomy and control over their work domain. This opens a promising area of research on workplace spirituality and its potential (mis) use in the social enterprise context. To bring forth the relevance of spirituality for alternative organizational forms, and vice versa, the present paper discusses the connection between workplace spirituality and social enterprise.

The remainder of this paper is organized as follows. First, the main conceptualizations and critical aspects of workplace spirituality are presented. This is followed by an overview of social enterprise and its connection to spirituality. Next the methodology is presented. Then, the mutual characteristics between workplace spirituality and social enterprise are discussed – that is, prosocial motives, doing well, and being well. The paper concludes with a summary and a call for future research on workplace spirituality in social enterprises.

Workplace spirituality

Spirituality is a rich, intercultural and multi-layered concept, which can mean different things to different people. Spirituality is characterized as both personal and universal (Bouckaert & Zsolnai, 2012; Mitroff, 2003). In general, spirituality can be understood as a 'reconnection to the inner self, a search for universal values beyond egocentric strivings, deep empathy with all living beings, and transcendence' (Bouckaert & Zsolnai, 2012, p. 491). Although spirituality is historically rooted in religion, its current use in business is often not associated with any specific religious tradition (Korac-Kakabadse et al., 2002) and even goes beyond the boundaries of institutional religions (Bouckaert & Zsolnai, 2012). Thus, management and organizational scholars have called for a distinction between spirituality at work and religion at work (e.g. Ashmos & Duchon, 2000; Bouckaert & Zsolnai, 2012; Korac-Kakabadse et al., 2002; Mitroff, 2003), noting that spirituality is a broader term that can encompass but also advance beyond religion. This paper follows this approach.

Within the domain of work, the interest in spirituality has been welcomed from the 1970s (see Oswick, 2009) and has rapidly increased in the field of management for the last two decades (Houghton et al., 2016; McKee et al., 2008; Oswick, 2009), with the first major study conducted in the 1990s in the corporate context (see Mitroff & Denton, 1999). Like spirituality in general, there is a lack of consensus about the meaning of workplace spirituality, although these terms have been used somewhat interchangeably in the management and organizational research. Workplace spirituality, however, is a narrower term than spirituality and here refers to the expression of spiritual values and beliefs in the work sphere, which invites a plethora of interpretations. As Case and Gosling (2010, p. 263) have noted, workplace spirituality is 'an ephemeral phenomenon approachable from multiple perspectives'.

Based on the literature, several common dimensions of workplace spirituality can be identified that relate to an individual's characteristics or motives, behaviours and

experiences. These can include, for example, connection, compassion, mindfulness, meaningful work, transcendence, interconnectedness, a sense of mission and purpose, a sense of wholeness or a holistic mindset, doing work with broader societal implications, purpose beyond one's self, a sense of calling, eudaimonia and well-being (see Dik & Duffy, 2009; Dolan & Altman, 2012; Duffy & Dik, 2013; Fry, 2003; Guillén et al., 2015; Jurkiewicz & Giacalone, 2004; Mitroff & Denton, 1999; Pawar, 2008; Sendjaya, 2007; Sheep, 2006; Van Dierendonck & Mohan, 2006; Wills, 2009). Ashmos and Duchon (2000, p. 137) provide a three-dimensional framework for spirituality – inner life, meaning and purpose in work, a sense of connection and community – and define workplace spirituality as 'the recognition that employees have an inner life that nourishes and is nourished by meaningful work that takes place in the context of community'. According to Krishnakumar and Neck (2002, p. 154–156), the perspectives on spirituality can be categorized within three positions: the intrinsic-origin view (originating from within, inner consciousness, beliefs and values); the religious view; and the existentialist view (search for meaningful work). The conceptualization of Krishnakumar and Neck (2002) is similar to that of Ashmos and Duchon (2000), although the former advanced a religious perspective to workplace spirituality. The intrinsic-origin view corresponds to the inner life and community dimensions, and the existentialist view is consistent with the meaningful work dimension.

Jurkiewicz and Giacalone (2004, p. 129) define workplace spirituality as 'a framework of organizational values evidenced in the culture that promote employees' experience of transcendence through the work process, facilitating their sense of being connected to others in a way that provides feelings of completeness and joy'. According to Lips-Wiersma et al. (2009), the central notion of workplace spirituality is bringing the physical, intellectual, emotional and spiritual dimensions of the person to the workplace. Sheep (2006, p. 360), meanwhile, offers a convergent definition of workplace spirituality, based on the following four common dimensions:

1. self-workplace integration (a holistic approach to workplace and self, and a personal desire to bring the whole being into work),
2. meaning in work (of the work itself, rather than the work environment),
3. transcendence of self (rising above self to become part of an interconnected whole), and
4. growth / development of one's inner self at work.

In an effort to provide an inclusive framework, Houghton et al. (2016) update and expand the original conceptualizations of Krishnakumar and Neck (2002). Citing various sources, Houghton et al. (2016) suggest that, despite previous concerns about the lack of focused approach to workplace spirituality, definitions of this concept have revolved around the three dimensions originally provided by Ashmos and Duchon (2002), which can serve as a basis for a common definition. The categorization of Krishnakumar and Neck (2002) further contributed to a focalization around the key ideas of consciousness, connectedness and meaning and purpose at work (Houghton et al., 2016). They further note (p. 181) that workplace spirituality can be conceptualized at the individual level (e.g. perceptions of inner life, meaningful and purposeful work, and a sense of community and connectedness); group level (e.g. sense of community); and as an organization-level phenomenon (e.g. spiritual climate or culture as reflected in the organization's values, vision and purpose).

A more recent work on workplace spirituality, described as self-spirituality (Zaidman, 2019), proposes spirituality at work as a radical equality approach to workplace relations and an alternative to the masculine secular organizations, thereby providing a gender-based critique of workplace spirituality. Self-spirituality, according to Zaidman (2019), has the potential for developing relationships based on cooperation, in opposition to secular masculine organizations, thus causing objections and discomfort. This author criticizes masculine ways of knowing and organizing such as rationality, patriarchy and competition, arguing for the acceptance of a more feminine mode of feelings into organizations. Zaidman (2019) suggests that 'feminine' modes of incorporating spirituality into organizations do not allow domestication for masculine, rational or utilitarian purposes of control and dominance and thus, these modes correct for the potential misuse of workplace spirituality.

Overall, workplace spirituality is seen by its advocates as a new paradigm in the field of management and organizations – referred to as 'the spirituality movement' – that focuses on understanding employees' spiritual needs and search for meaning (Guillén et al., 2015; Karakas & Sarigollu, 2013, p. 667) and includes expressions of one's spirituality at work with societal considerations (Sheep, 2006). Nurturing and developing one's spiritual side means offering a source of strength, both on and off the job, and at the same time helping employees to develop, which consequently results in making the workplace a stronger, safer and much saner place to do business (Korac-Kakabadse et al., 2002). Success from a spiritual perspective is about a sense of accomplishment, a balance of work and family, and contributions to both society and to employees (Ashar & Lane-Maher, 2004). This very much connects to the perspective of social entrepreneurship and its goals.

However, other scholars have asserted that spirituality at work is not a new discourse and have provided a more critical outlook on workplace spirituality (e.g. Bell & Taylor, 2003; Case & Gosling, 2010; Long & Driscoll, 2015). For instance, Long and Driscoll (2015) posit that workplace spirituality emerged by borrowing from other organizational studies discourses, while Bell and Taylor (2003) argue that the intent and practices of workplace spirituality are not novel – rather, organizations and spirituality have a long and complex history, particularly rooted in the Protestant values that gave rise to the capitalist work ethic. These authors refer to the work of Weber and Foucault to provide a perspective on the centrality of reli-

gion and spirituality in modern day work and disciplinary practice, which can be appropriated by managers as a tool for obedience and a 'source of pastoral power' (Bell & Taylor, 2003, p. 340–342) to encourage employees' willing compliance in the spiritual organization (Case & Gosling, 2010). This can refer to utilizing spirituality as an organizational resource for fostering employee performance, a source of meaning in whatever work conditions and as a tool to mobilize a process of internalizing the organization's aims and thus, colonizing the self through uncritical service to the organization's interests – all of which, ironically, goes against spirituality's aim of emancipation and eradication of dehumanizing practices.

Similarly, Long and Driscoll (2015) question whether workplace spirituality can offer solutions to organizational issues when it is not a new phenomenon in organizations. These authors' analysis shows that workplace spirituality borrows from organizational discourses, such as positive organizational scholarship (POS), human relations movement, diversity management, leadership and corporate social responsibility (CSR), and carries the same limitations to bring forth ideas about collaboration, participation, inclusion and responsibility to others as valuable goals in and for themselves, beyond being just part of a manager's toolkit. Consequently, the main criticism of workplace spirituality is that spirituality assumes an apolitical and non-controlled organizational context, which creates tensions between releasing or managing spirituality in organizations, emphasizes individual rather than structural level change and works within the current capitalist institutions and economic system rather than challenging it to bring about social change (Bell & Taylor, 2003; Long & Driscoll, 2015). This criticism is concerned with the prevailing individualizing tendencies of the workplace spirituality discourse rooted in Western individualistic logic that focuses on self-improvement and prosperity (enlightened self-interest), which do not question or disrupt the systemic business foundations, which are by nature regressive.

Thus, workplace spirituality is perceived as both a novel and an existing discourse within organizations that can be progressive or alienating and enable both individualizing and totalizing use of power; the latter leading to 'the engineering of the human soul' (Rose, 1990; Townley, 1994, in: Bell & Taylor, 2003, p. 342). Nevertheless, it is possible for workplace spirituality to support 'complementary personal and organizational transformation' (Bell & Taylor, 2003, p. 345), to promote cooperation and compassion and improve the state of workers and work, provided spirituality engages with business and societal level discourses for genuine improvement of work-life conditions (see Long & Driscoll, 2015). In trying to address the debate between instrumentality and ethicality, Sheep (2006) suggests a person-organization fit where workplace spirituality is driven by a worker's preferences to achieve both individual and organizational development, as well as taking a multiparadigm approach in which no one concern or perspective (individual-organization-society) is privileged over another. This paper proposes that an alternative organizational discourse such as social entrepreneurship may be relevant to the discussion of workplace spirituality, as it centres on ideas for alternative ways of organizing founded on inclusion, democratic participation and prioritizing human and planetary interests over economic ones.

Social enterprise

The term social enterprise is used as a broad umbrella for different alternative organizational forms and activities that create social value by providing solutions to social problems. Social entrepreneurship is the process through which a social enterprise is created, and this form of entrepreneurship is viewed as a simultaneous pursuit of social, economic and environmental goals that stems from the interplay of general, mutual and capital interests (Defourny & Nyssens, 2017). This definition encompasses both for-profit and non-profit enterprises, with most of the focus being on non-profits and the creation of social value over economic value (Austin et al., 2006; Dacin et al., 2010; Dees, 1998; Mair & Marti, 2006; Peredo & McLean, 2006, in: Tiba et al., 2018, p. 266; Zahra et al., 2009). According to Teasdale (2012, p. 101), the distinction between social enterprises and other forms of organizations is based on two dimensions: the relative adherence to social or economic goals, and the degree of democratic control and ownership. Teasdale (2012) concludes that the similarity in all of the definitions of social enterprises is the primacy of social aims and the centrality of trading; however, different authors use the term to label different organizational types and practices.

Scholars have argued that the social enterprise is not a new organizational form and that it 'encompasses a large range of organizations evolving from earlier forms of non-profit, co-operative and mainstream business' (Teasdale, 2012, p. 100). Many of these organizational forms have existed for centuries, but the current discourse in academia uses new language for describing them (Defourny & Nyssens, 2010). For example, the neo-liberal discourse promotes businesses as powerful means for achieving social change, which resulted in the construction of a narrative of social enterprises (Dey & Steyaert, 2010). The construction of social enterprises is ongoing and there are competing narratives about what a social enterprise is.

Social entrepreneurship is usually defined as an entrepreneurial activity found in the non-profit, business and governmental sectors to create social value (Austin et al., 2006) and usually targeting local problems with global relevance (Santos, 2012). Santos (2012) develops a positive theory of social entrepreneurship to avoid normative classification on what is social or not and focuses on value creation. In this view, social entrepreneurs are primarily motivated by creating value for society, instead of capturing value, as commercial entrepreneurs do. This focus differentiates social entrepreneurs by how they act: (1) they aim to achieve a sustainable solution (rather than a competitive advantage) and (2) they have a logic of empowerment (instead of control) concerning internal and external organizational stakeholders (Santos, 2012, p. 345).

Kay et al. (2016) propose an alternative conceptual framework for social enterprises and suggest that social enterprise activities should work towards social, environmental and societal impacts while using economic activities as a means to achieve these results. This challenges the commonly addressed triple bottom line (social, environmental, economic) and replaces the economic with a societal impact. Societal impact is about the relationships between individuals and groups, and in this sense, it is distinct from social impact, which is an impact on individuals and groups but not on the relationships between them (see Kay et al., 2016). Societal impact is about prosperity and relationships, and the economic aspect only helps to support this goal, but is not an end goal in and for itself. Advancing the motivational aspects in various forms of social enterprises, Bull and Ridley-Duff (2019) develop a comprehensive framework that explains the underlying moral reasoning behind different orientations of social enterprises ranging from the altruistic or philanthropic to commercial endeavours.

It is thus possible that socially oriented entrepreneurial activities – such as improving the living conditions of communities, societal development or care for the environment – can be spiritually motivated. However, this is not to say that all social enterprises are simultaneously spiritual enterprises. The two can be mutually reinforcing but not necessarily related. In this vein, Ungvári-Zrínyi (2014) emphasizes the importance of spirituality for socially and environmentally responsible entrepreneurship and has stated that organizations should not be considered as money-producing machines, but rather as communities that produce social values and positive outcomes for people and society. The common spiritual themes that relate to entrepreneurship include meaning and purpose, living an integrated life, experiencing inner life and being in community with others (see Kauanui et al., 2010). According to Sullivan Mort et al. (2003), the spiritual or virtue aspect is an important dimension of social entrepreneurship, which distinguishes social from commercial enterprises. Virtues such as compassion, empathy and honesty are characteristic of social enterprise endeavours that aim to make a meaningful contribution to socioeconomic development (Sullivan Mort et al., 2003).

Following Santos' (2012) positive theory of social entrepreneurship, this paper proposes that the need for social value creation can be aligned with spiritually driven motives (doing good for others) and suggests a complementary perspective between spirituality at work and social enterprise. Social enterprises are an example of balancing between commercial logic and the logic of social purpose, with a focus on the latter. This does not mean that there is a trade-off between these goals, because they may be simultaneously achieved; rather, it implies that the emphasis is on shared values and outcomes, instead of solely personal gains. This aligns with the spiritual outlook to work orientation, and this mutuality is addressed next.

Methodology

This paper is based on a review of the workplace spirituality and social enterprise literatures. A narrative literature review was conducted to present a broad overview of the topics investigated and to present perspectives that could stimulate further scholarly dialogues and provide guidance for future research endeavours (see Green et al., 2006). Narrative reviews are not a form of evidence; rather, they are useful for developing new ways of thinking about certain phenomena. The first step in this kind of review is to identify whether there is any published material on the topic to establish the need for such contributions. Therefore, a preliminary search of the literature on workplace spirituality and social enterprise was conducted, which showed that there are no articles published that address the connection between the two phenomena and the existing studies are inadequate to answer the question fully. Thus, the contribution of this review is to illuminate the potential of connecting workplace spirituality and social enterprise and to set forth a research agenda.

The literature search on both workplace spirituality and social enterprise was conducted by using the following databases: EBSCOhost Business Source Premier, Emerald Insight, Sage journals, Springer, Taylor & Francis Online, Wiley Online Library and ScienceDirect. Relevant journal articles were searched using the words 'workplace spirituality' or 'spirituality' and 'social enterprise' in title/abstract/keywords and, alternatively, with either of the term appearing anywhere, when the search for both terms in the title/abstract/keywords produced zero results (see the Appendix). The results that appeared in the databases were filtered based on the criteria explained below.

Publications that did not mention (workplace) spirituality or social enterprise, or both, in either the title, abstract or keywords were excluded. The resulting articles were checked for the topics and questions they addressed and were assessed based on their suitability to be included in this review. For instance, a word search was performed within each publication to assess the relevance of spirituality in a social enterprise publication or social enterprise in a spirituality publication. The publications that had only a few mentions of spirituality and/or social enterprise (i.e. under five) within the body of the text were also excluded from this review.

Upon filtering the articles, only a few publications fitted the search criteria in terms of addressing both spirituality at work and social entrepreneurship sufficiently as core research theme/s. These publications do not explore the conceptual connection between the two fields, but rather provide evidence about specific spiritual (religious) principles or practices and the contexts of social enterprise. For instance, the case study of Haskel et al. (2012) describes an Egyptian caregiving social enterprise that illustrates the integration of spiritual and religious inspired values for community transformation and social impact. Waddock and Steckler (2013) illuminate how social entrepreneurs are guided by purpose and how they can engage in spiritual practices through retreats as spiritual spaces

for inspiration and connection. Gamble and Beer (2017) examine performance measurement in non-profits informed by Buddhist spiritual practices and identify three essential principles. Finally, Gjorevska (2019) theorizes about spiritually informed motives for engaging in social enterprise endeavours.

The abovementioned publications were not sufficient for exploring the key features that connect workplace spirituality and social entrepreneurship, so additional publications were identified from review papers on each topic. For workplace spirituality, several databases were searched (EBSCOhost including Business Source Premier, Emerald Insight, Springer, Sage Journals, ScienceDirect, Taylor & Francis Online and Wiley Online Library) using the following keywords: 'workplace spirituality' (in title) and 'review'. The initial selection began with peer-reviewed articles in English, some of which appeared in the search results across several databases. These articles were used as a starting point in the analysis of workplace spirituality. For instance, Houghton et al. (2016) appeared in almost all of database search results; the following articles appeared in more than one or two databases: Vasconcelos (2018), Long and Driscoll (2015), Case and Gosling (2010), Oswick (2009), Pawar (2009) and Sheep (2006). Following this, works referenced in these publications were explored. The publications used as a starting point for the social enterprise literature were articles from renowned authors in this field that addressed the typology and discourse of social enterprise, such as Defourny and Nyssens (2017), Teasdale (2012) and Santos (2012).

Workplace spirituality and social enterprise

Both workplace spirituality and social enterprise are multifaceted and fluid phenomena that lack a clear or overarching definition, and both perhaps should not be simplified to one single definition. This opens possibilities for further investigation into our understanding of these concepts and their interrelation. While there are a relatively solid number of articles about (workplace) spirituality and social enterprise, respectively, the studies on the connection between them are limited. Regarding entrepreneurship in general, Kauanui et al. (2010) provide evidence of spiritually driven motives among entrepreneurs, while Balog et al. (2014) show that there is a rich connection between entrepreneurship and spirituality. The study of spirituality within the entrepreneurial context shifted from macro-level outcomes (firm performance) in the 1980s to more micro-level outcomes (motives, well-being) in the mid-2000s (see Balog et al., 2014). With respect to spirituality in the social enterprise context, the existing studies have mainly focused on leadership perspectives and motivational aspects (e.g. Miller et al., 2012; Ungvári-Zrínyi, 2014). Thus, there is still little evidence about the intersection between workplace spirituality and social enterprise, and more studies are needed to examine the potential of bridging these phenomena.

Within the literature, there are perspectives on the dark side of workplace spirituality (e.g. Ashforth & Pratt, 2003; Case & Gosling, 2010; Lips-Wiersma et al., 2009; McKee et al., 2008) and on the dark side of social entrepreneurship (e.g. Chell et al., 2016; Dacin et al., 2011; Talmage et al., 2019), albeit without consideration of both phenomena jointly. Like workplace spirituality, the critical issues with respect to social entrepreneurship involve exploitation for private gain, corrupt use of resources, mission drift or failure (see Talmage et al., 2019, p. 135). Nevertheless, workplace spirituality and social enterprises have the potential to expose and find alternatives to existing socio-economic inequalities to improve the conditions of work workers and society. Therefore, this paper focuses on the common ground between workplace spirituality and social entrepreneurship that is potentially generative of positive outcomes for workers, members of society and beyond (e.g. the natural world). The proposition of this paper is that workplace spirituality has the capacity to support the social value orientation of social enterprises and prevent them from falling into exploitative practices for material gains, while social enterprises can in turn, correct for the potential misuse of spirituality that could result in disregarding the material conditions.

On the one hand, workplace spirituality could be a corrective measure to restore balance between the material and non-material aspects, provided it is practised to make genuine improvements to work and social conditions, with democratic engagement of stakeholders and accountable management (as outlined by Long & Driscoll, 2015, p. 959). In this way, workplace spirituality can prevent social enterprises from reverting to prioritizing economic goals and competitiveness. This comes from the possibility that the 'social' in social entrepreneurship is not necessarily inherently ethical, and that during challenging circumstances, social entrepreneurs may be prone to mission drift (e.g. Chell et al., 2016). Dacin et al. (2011), for example, warn about the danger of privileging the achievement of economic goals (revenue) to the point of neglecting social value creation or making it symbolic solely to serve economic goals. Incorporating spirituality at work can support alternative ways of organizing based on cooperation and mutuality, rather than competition and utilitarianism (see Zaidman, 2019), which maintains a focus on value creation for self and others and, thus, helps sustain the social enterprise's purpose. For instance, Gamble and Beer (2017) show that not-for-profit social enterprises that integrate spiritual practices (individual/organizational awareness, connectedness and higher meaning) can mitigate the overemphasis on profit in performance management. Engaging in spiritual activities, such as reflective practices, can 'generate self-, other- and system- awareness' that can support commitment to social change by allowing individuals to become aware of and connected to a bigger set of issues in the broader system (Waddock & Steckler, 2013, p. 297). Furthermore, the integration of (spiritual or religious) values can support engagement in social enterprise activities and sustain commitment to community transformation and development (see Haskel et al., 2012).

On the other hand, the social entrepreneurship context could provide a workplace spirituality practice that

accounts for material and work environment factors. This is because of the danger of spiritual symbolism that could result in organizations taking advantage of workers and co-opting them to endure adverse working conditions, as some scholars have warned (see Ashforth & Pratt, 2003; Bell & Taylor, 2003; Case & Gosling, 2010; Long & Driscoll, 2015; May et al., 2004; McKee et al., 2008). Social entrepreneurship could be a corrective measure in such cases, as alternative organizational forms tend to be based on the principles of democratic control and decision-making, solidarity and responsibility (see e.g. Parker et al., 2014; Pearce, 1994; Teasdale, 2012). For instance, alternative organizations such as cooperatives provide workspaces that are worker controlled and owned, which enables disalienation or 'being at home' at work (see Kociatkiewicz et al., 2020). In this way, within the context of social enterprises, workplace spirituality and social entrepreneurship can have a complementary, mutually reinforcing relationship, which may be a promising avenue for future studies.

The underlying beliefs that have led to the emergence of social enterprises are similar to those of organizational spirituality and illustrate a paradigm shift from the understanding of businesses as primarily serving their commercial interests. This is due to the realization that businesses do not operate in isolation from the society they are part of, which brings the prosocial orientation to the fore. Social enterprises give primacy to social purpose before profit (Teasdale, 2012) and to value creation for stakeholders before shareholders (Santos, 2012). Social entrepreneurship has gained momentum for its ethically, socially inclusive and responsible ways of producing goods and services (e.g. Kay et al., 2016). Similarly, the literature on spiritual motives in the workplace suggests that spiritual individuals prioritize value creation over value capture (Kauanui et al., 2010); aim to contribute to society (Fry, 2003); care for multiple stakeholders (Avolio et al., 2004, Benefiel, 2005; Fry, 2003; Reave, 2005; Stone et al., 2004; Zsolnai, 2011); and consider the quality of their organization's products (Pruzan, 2008). Considering that most research around workplace spirituality centres on motives, (leadership) behaviours and organizational and/or individual outcomes, these common aspects of workplace spirituality are compared to similar themes in social entrepreneurship and grouped into motives, practices and well-being outcomes (see Table 1).

In terms of motives, both workplace spirituality and social entrepreneurship encompass prosocial or other-oriented motives that support the goal of giving to others by feeling a unity or interconnection. In terms of practices, both phenomena are focused on doing well for others and self, doing good in and for itself, contributing to the greater good and looking beyond immediate self-interest, which supports purpose orientation and value creation. With respect to well-being, both workplace spirituality and social entrepreneurship not only contribute to experiencing heightened form of well-being, but also a more meaningful and long-lasting one (flourishing), which comes from service to others and meaningful work, and both seek to maximize well-being for all stakeholders, or as many as possible. These common aspects are addressed in the following sections.

Prosocial (other-oriented) motives

This aspect refers to individual entrepreneurs' and workers' motives for work and engaging in social enterprises. Within the domain of (workplace) spirituality, motivational aspects are addressed as in a self-transcendent, other-focused orientation to work (e.g. Ashmos & Duchon, 2000; Guillén et al., 2015; Koltko-Rivera, 2006; Mitroff & Denton, 1999; Tongo, 2016). The basic assumption of the spirituality movement is that human beings are not driven solely by self-interest (intrinsic and extrinsic motives), but also by *others-interest* – that is, humans have transcendent motives (Guillén et al., 2015). The essence of transcendent or prosocial work motivation lies in a spiritually induced process, driven by a selfless need to improve the lives of employees, the community, society and the environment (Guillén et al., 2015; Sheep, 2006; Tongo, 2016; Ungvári-Zrínyi, 2014). The spiritual motivation in the workplace is thus based on the idea of connecting to others, a sense of holism (e.g. Ashmos & Duchon, 2000; Mitroff & Denton, 1999) and seeing work as a calling (broadly defined as a sense of purpose beyond the self; Fry, 2003) that has primarily other-oriented motives to help or advance others in some way (Dik & Duffy, 2009; Duffy & Dik, 2013).

Table 1

Common aspects of workplace spirituality and social entrepreneurship

	Workplace spirituality	Social entrepreneurship	Common aspects
Motives	Compassion; prosocial/ transcendental motivation; interconnectedness; a sense of mission/purpose/calling; holism	Prosocial orientation; other-regarding; compassion; holistic mindset; inclusiveness	*Prosocial motives*
Practices/ behaviours	Common good – doing work with broader societal implications; purpose beyond one's self; cooperation; meaningful work	Value creation – social, societal, environmental, economic; achieving sustainable solution; meaningful contribution; cooperation	*Doing well(value creation)*
Outcomes/ experiences	Eudaimonia; well-being; flourishing	Empowerment; multi-stakeholder well-being	*Being well (flourishing)*

Source: own research

Within the field of social entrepreneurship, similar notions of other-orientation have been expressed. For instance, Santos (2012, p. 349) challenges the divisive distinction between 'self-interest' and 'other-regarding' behaviour and states that there is growing evidence 'of economic actors that behave as if motivated by a regard for others (creating social enterprises, volunteering in charities, and pursuing social missions in their organizations)'. Kauanui et al. (2010) provide evidence of a prosocial, spiritual motivation among entrepreneurs, labelled as 'make me whole', albeit not solely among social entrepreneurs, which supports the presence of spiritual motives in entrepreneurship. Bull and Ridley-Duff (2019) develop a motivational matrix in social enterprise business models that distinguishes between who directs the activities (self-directed or directed by others) and who benefits (the self or others). Depending on the specific social enterprise form, the activities can be motivated by prosocial, mutualized (reciprocal) and individualized outcomes. This framework helps explain how motivations in social enterprise drive individual and/or collective action, as well as the response to social challenges.

Prosocial motivation thus appears to be a common aspect in workplace spirituality and social enterprise. However, more research evidence is needed to explore the role of spirituality in maintaining prosocial orientation, especially during challenges, as well as whether a social enterprise setting (and what kind) can sustain a spiritual workplace in times of crisis. Would there be a difference or change in motives between stable and challenging times? These are some questions that could be explored further regarding the motivational aspects of spirituality in social enterprises.

Doing well (value creation)

This aspect can be linked to individual, group and organizational level practices. This perspective is about doing what is good for the sake of doing it, for itself. The same perspective translated into organizational contexts means creating more 'relational goods' than 'positional goods', which comes down to helping one another instead of competing at and through work. As a result, discovering and constructing the self through work is becoming more important than advancing the self in the organization, which explains the increase in organizational spirituality and social enterprise initiatives.

Within the workplace spirituality discourse, Benefiel (2005) provides an example of a spiritual journey for individuals and organizations and shows that spirituality at work involves giving to and serving others even when it does not seem profitable or convenient. This account resembles social entrepreneurship's primacy of social service over economic gains. Within the social enterprise discourse, scholars have conceptualized a social enterprise as an economic activity that seeks to maximize well-being for all (see Kay et al., 2016), which resembles the spiritual perspective of giving to others. Kay et al. (2016) also suggest that social enterprise can and should contribute to individual and community well-being. Value creation, community service or serving the common good (framed here as doing well) are topics present in both the workplace spirituality (e.g. Bouckaert & Zsolnai, 2012; Fry, 2003; Sheep, 2006; Ungvári-Zrínyi, 2014) and in the social enterprise literatures (e.g. Defourny & Nyssens, 2017; Kay et al., 2016; Santos, 2012).

A promising avenue for future research could involve exploring spiritual workplace practices in social enterprises (different forms, contexts) in terms of how value is created, as well as what kind of value and for whom. What are some of the ways in which social enterprises that are spiritual could maximize value for all or most stakeholders? How could spirituality protect against social enterprises' mission drift, and vice versa, how could social enterprises guard against the misuse of workplace spirituality? How would a spiritual social enterprise respond to crises and aim to address all or as many goals as possible (social, societal, environmental, and economic)?

Being well (flourishing)

This aspect can be linked to individual, group, organizational and extra-organizational perspectives. Workplace spirituality (including spiritual leadership) has been associated (mainly from organizational and leader/employee perspectives) with many beneficial outcomes such as high morale, commitment, ethical behaviour and less stress (Fry, 2003; Giacalone & Jurkiewicz, 2003; Karakas, 2010; McGhee & Grant, 2017; Mitroff & Denton, 1999), as well as better leadership, increased creativity and productivity and reduced turnover (Sendjaya, 2007, p. 105). Despite the limitations of these perspectives, the spiritual paradigm is a promising approach for creating better societies by enhancing the well-being of multiple stakeholders (Tencati & Zsolnai, 2012; Vasconcelos, 2015, 2018).

In most organizational research, the relevance of well-being has been assessed through the perspective of performance and how managers can redesign work practices to support employee and organizational well-being for performance reasons (Grant et al., 2007). In contrast, workplace spirituality scholars address well-being as a valuable outcome in itself (Korac-Kakabadse et al., 2002, McKee et al., 2008, Ungvári-Zrínyi, 2014). Spirituality is seen as part of the eudaimonic approach to well-being (e.g. Van Dierendonck & Mohan, 2006; Wills, 2009). Eudaimonia is about excellence, human flourishing (for more details see for example Aristotle, 2014) and living life (including work life) in accordance to inner beliefs, values and potentials for achieving worthy goals or making a significant contribution, which gives meaning to one's existence (Van Dierendonck & Mohan, 2006; Wills, 2009). Similarly, spiritual well-being is a lifelong dedication and attunement with the self, the community, the environment and the sacred (Van Dierendonck & Mohan, 2006). This means living in harmony and unity with the self, as well as with others. Thus, spirituality includes eudaimonic, pro-other well-being concerns. The 'other' could be understood broadly as humanity, society, the environment and other living beings.

Social enterprises, likewise, aim to facilitate well-being at various levels. Kauanui et al. (2010) show that spiritually oriented entrepreneurs, as opposed to financially oriented ones, benefit from heightened well-being. Munoz et al. (2015) provide evidence that social enterprise supports both reflective and experiential types of well-being. These authors also state that well-being can be experienced beyond the space of the social enterprise, stemming from the human and social capital development of people and communities. Thus, well-being outcomes transcend social enterprise members and users, or the social enterprise as a whole, and extend to broader communities and to other areas of life. The social value creation can result in personal, mutual or public benefit (Bull & Ridley-Duff, 2019). Social enterprises, therefore, can have a wider role in supporting flourishing, as they can enhance place-based well-being, as well as contribute to socioeconomic development (e.g. Kay et al., 2016; Munoz et al., 2015). This is similar to the spiritual approach; however, future research could explore these potentials in spiritual social enterprises.

Certainly, the work that organizational members do is not distinct from the rest of their life, and it impacts how individuals understand and express themselves, and how they experience their life as a result of the work they do (Chalofsky, 2003). Beyond the individual level, it is important to consider the wider benefits of the work performed in and for organizations. This is something that workplace spirituality and social entrepreneurship have in common, which is a potential for further study. For instance, how could a balance between giving to self and to others or balancing manifold (often competing) goals be achieved in a spiritual social enterprise?

Conclusion

Social enterprises offer a work context in which organizational members can reconcile their (spiritual) beliefs with a career in business. This type of work context may alleviate potential tensions that may arise between individual beliefs and what is (seen as) socially acceptable at work. These issues are equally relevant for both individual experiences of well-being at work and collective well-being through creating work that serves people and communities better, thus, generating positive outcomes for the individual, the community and society.

Social enterprises seem to be a promising way of organizing, compared to conventional businesses, due to their ingrained social purpose as part of their business model, rather than just a social responsibility initiative. These contemporary initiatives indicate that today's workforce wants to imbue meaning in organizational life beyond solely pursuing an income. Thus, work becomes more than a source of paycheque: the workplace becomes a space for discovering and constructing the self and an opportunity to serve others. Therefore, social enterprises can be a supportive context for workplace spirituality that aligns the need for value creation with spiritually driven motives (doing good for others). Moreover, workplace spirituality can support the preservation of the integrity of social enterprises' purpose. The spiritual perspective on the understanding of the social enterprise and the complementarity between the two fields could be a promising future research agenda.

This paper has presented the main characteristics of alignment between workplace spirituality and social enterprises based on a review of the literature (although this was not exhaustive). The paper raised questions for further exploration within each aspect of complementarity between workplace spirituality and social enterprise (motives, practices, outcomes). Future studies could thus look at whether – and if so, in what way – social enterprises in different contexts and cultures manifest work spirituality. It would also be relevant to explore spirituality in social enterprises in different industries and sectors. Beyond the motivational aspects, looking into specific practices, ways of organizing and cooperation within and beyond the organization will improve our understanding of the potential implementation of spirituality in social enterprises. Finally, the topic of well-being – for whom and by whom – deserves attention. It would be especially important to include a perspective beyond individual entrepreneurs or leaders such as organizational members in various roles and positions. The voice of the employee is still lacking in the management and organization literature in general, and likewise, in the workplace spirituality and social enterprise research. This perspective could, however, bring invaluable insights.

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FANNI TÓTH

HIDDEN PREFERENCES IN SOCIAL RESPONSIBILITY – THE ANALYSIS OF ERSTE SEEDS CORPORATE SOCIAL RESPONSIBILITY PROGRAMME

REJTETT PREFERENCIÁK A TÁRSADALMI FELELŐSSÉGVÁLLALÁSBAN – AZ ERSTE SEEDS VÁLLALATI TÁRSADALMI FELELŐSSÉGVÁLLALÁSI PROGRAMJÁNAK ELEMZÉSE

Banks are usually active in creating and operating corporate social responsibility (CSR) programmes for different reasons. This paper analyses the Erste Bank SEEDS programme, which is dedicated to entrepreneurs promoting social welfare in Hungary. A total number of 68 social entrepreneurs were selected from 203 applicants to participate in the programme. To detect the success factors, the paper examines all proposals with content analysis. Then, using a bivariate logistic regression, the research estimates the probability of getting selected and identifies three critical factors: the potential social impact, financial sustainability and the life cycle of the product or service. These results hint to the bank caring about social impacts but only if financial sustainability is assured. Some social activities (community building, health or sustainable lifestyle) are less preferred than others (employment). The main contribution of the study is to present how corporate social responsibility programmes can be analysed and what hidden requirements may be incorporated within them.

Keywords: **CSR, logit model, social entrepreneurship, content analysis**

A bankok vállalati társadalmi felelősségvállalása (CSR) különböző okokra vezethető vissza. A tanulmány az Erste Bank SEEDS programját vizsgálja, amely szociális jólétet elősegítő vállalatoknak szól Magyarországon. A 203 jelentkezőből összesen 68 társadalmi vállalkozás került a programba. A bekerülés sikertényezőinek felderítése a jelentkezők pályázatainak és értékelésük tartalomelemzésével, majd logisztikus regresszió segítségével a kiválasztás valószínűségének elemzésével valósul meg. Az elemzés a programba kerülés szempontjából három kritikus tényezőt tár fel: a társadalmi hatást, a pénzügyi fenntarthatóságot és a termék vagy szolgáltatás életciklusát. A bank tehát valóban törődik a társadalmi hatás elérésével, de csak abban az esetben, ha a projekt megvalósíthatósága és pénzügyi fenntarthatósága biztosított. Néhány terület, mint a közösségépítés vagy a fenntartható életmód, kevésbé preferált szemben a munkahelyteremtéssel. A tanulmány fő hozzájárulása annak bemutatása, hogy hogyan lehet elemezni a vállalati társadalmi felelősségvállalási programokat, és milyen rejtett követelmények lehetnek beépítve azokba.

Kulcsszavak: **CSR, logit modell, társadalmi vállalkozások, tartalomelemzés**

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Author/Szerző:
Tóth Fanni, PhD student, Corvinus University of Budapest, toth.fanni@uni-corvinus.hu

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Engagement in a corporate social responsibility (CSR) programme can be beneficial for a bank. Gangi, Meles, D'Angelo and Daniele (2019) analysed the relationship between the bank's environmental engagement and its risk, and pointed out that a bank with more sensitivity towards environmental issues exhibits less risk. Liang, Chang and Shao (2018) compared the banks listed on the Dow Jones Sustainability Index (DJSI) with non-DJSI banks and discovered that listed banks were more cost efficient. Miralles-Quirós, Miralles-Quirós and Redondo-Hernández (2019) revealed that commercial banks increased their social responsibility to reinforce creditability and stakeholders' trust. The association between CSR and financial performance was examined by Wu and Shen (2013): they found a positive association. However, they also indicated that CSR is negatively associated with non-performing loans.

If the application is a precondition for participation in the CSR programme, it is essential to define and implement a selection process. Unfortunately, only a limited number of research papers on the evaluation of applications are available. One of these is a comparative study published by the European Commission (2012). This paper analysed project selection processes in six different EU member states, for three themes, across fourteen operational programmes financed by the European Regional Development Fund from 2007 to 2013. The objectives were to assess the effectiveness and efficiency of project selection processes, to identify good practice examples and to propose recommendations. According to this report, the eligibility criteria or exclusion criteria are clearly distinguished from the quality criteria. The quality of the projects can be evaluated by qualitative assessment involving external evaluators or scoring methods.

The Interreg IPA Cross-border Cooperation Programme Hungary-Serbia was approved by the European Commission in 2015, and it funded co-operation projects of non-profit organisations. According to its final evaluation report (Interreg IPA, 2019), the programme's selection process consisted of four parts. After checking the eligibility of applicants, a quality assessment was carried out by two external assessors, whose selection was also a strict procedure. Applicants received their final scores as an average of the two assessments. In the case of significant differences in the scores, a re-assessment process was incorporated into the phase of definition of the projects list. After approval of the final project list, the applicants got feedback about their project proposals.

The grants manual of the Horizon 2020 work programme (European Commission, 2015) also highlights the importance of external, independent experts in the evaluation process. The evaluation extends to the following criteria in this programme: excellence, impact and quality and efficiency of implementation. For each criterion, the assessors graded applicants from 0 to 5, with 5 being the best score.

In this paper, binary logistic regression is used to predict the probability of applicants' failure or success in the Erste SEEDs programme in Hungary. The research also aims at identifying the "hidden" requirements, those which were not explicitly formulated in the call for applications.

An excellent example of a CSR Programme is the Erste SEEDS' (Social Enterprise Establishment and Development Support) non-profit enterprise development programme launched in 2017, which can be interpreted as a social innovation. The Erste SEEDS was a one-and-a-half-year long investment-readiness and social entrepreneur development programme in Hungary. It aims to support participants to develop a social business model on their own. Social entrepreneurs can also obtain investor relations through the bank and are prepared for further financing with bank loans. Moreover, this programme targeted reduction of inequality and improvement of the quality of life of the people in need.

Application was only possible for social entrepreneurs in 2017. There was no other prerequisite for the application. It was not only available for existing organisations, but also for those who only had an idea to create a social impact.

The practical implementation of useful concepts, for the community, is often hindered by the fact that the idea owners do not have experience in setting up, operating or developing an organisation. Therefore, the primary goal of the programme was not only the financial support, but also to enhance knowledge. The Erste SEEDS programme was created to overcome the pitfalls and challenges of new organisations and to expand the business of existing organisations.

The successful applicants or participants of the programme took part in training sessions, a mentoring program and had the chance to receive a non-refundable grant to launch or develop their businesses. The social initiatives supported, until now, included aid to disabled persons and people living in extreme poverty, and developing physical and mental health. (Erste Bank Hungary Ltd., 2017a; Erste SEEDS, 2020)

The programme was founded by Erste Stiftung and received financial support from the European Union Programme for Employment and Social Innovation (EaSI). The 36-month program offered strong strategic support for the first 18 months. During the implementation of the programme, Erste Bank was assisted by advisory firms and 91 volunteers, 13 of whom were members of student organisations of the Corvinus University of Budapest and their alumni network (Erste Bank Hungary Ltd., 2017a; Erste Bank Hungary Ltd., 2018).

The current study aims to reveal the characteristics which have boosted the probability to be admitted successfully as a participant and examines the hidden preferences of the Erste SEEDS programme in 2017. In the analysis, a total of 203 applications were involved, of which 68 were successful. The evaluation was carried out with the involvement of experts, and the four-eyes principle was applied in the evaluation process. Thereby, the database comprises not only the short descriptions of the projects but also the written assessments of two reviewers for every application.

This study uses two methodological approaches. The first part is a qualitative research method, in which the content analysis is performed. Using this method allows the creation of indexes for the extension of social activities and social impact, or economic feasibility as potential success factors. Additionally, some other factors – life cycle of the products or services – were identified, which can be categorised clearly during the analysis. The second part builds on a quantitative research method, where the data generated in content analysis were examined with bivariate logistic regression to find the success factors of the participants in Erste SEEDS programme.

The relevance of this paper lies in the lack of similar researches, which address the relationship between the odds of enrolment in a development programme and success factors for social entrepreneurs. This study may provide guidelines and a solid basis for social entrepreneurs to prepare for an application, and the case study highlights which projects have the preference of being selected. The paper is structured as follows: after introducing the research data in Section 2, the methodological descriptions and the results obtained will be presented in Section 3, and the paper ends with the drawing of inferences in Section 4.

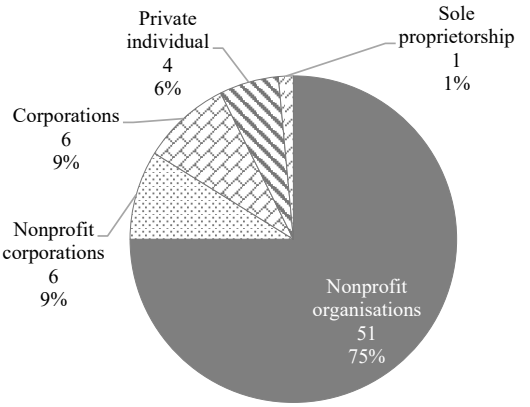
Research Data

During the analysis, the table of the tender evaluation of the applicants (Erste Bank Hungary Ltd., 2017b) was examined. Here, a summary of all the applicants' ideas or projects can be found, and the judgments are also included. The judgments were formed by Hungarian experts: they consist of two parts for each project: strengths and weaknesses or risks, which are also listed in detail, in the table.

Figure 1 shows the distribution of participants (68 successful applicants) by legal status, these data are not available in case of non-participants. Seventy-five percent of the enterprises are non-profit organisations, and only one participant works as a sole proprietor. Private individuals need to be explained, as not all participants were ready to form a legal organisation before the programme. Many activities are started from a private initiative and some people keep working in their "normal" job and besides this for social purposes. Only when there is a business case can these people quit their job and devote themselves entirely to the social activity, in which SEEDS grants can support them.

Figure 1.

Number and proportion of participants distributed by legal status



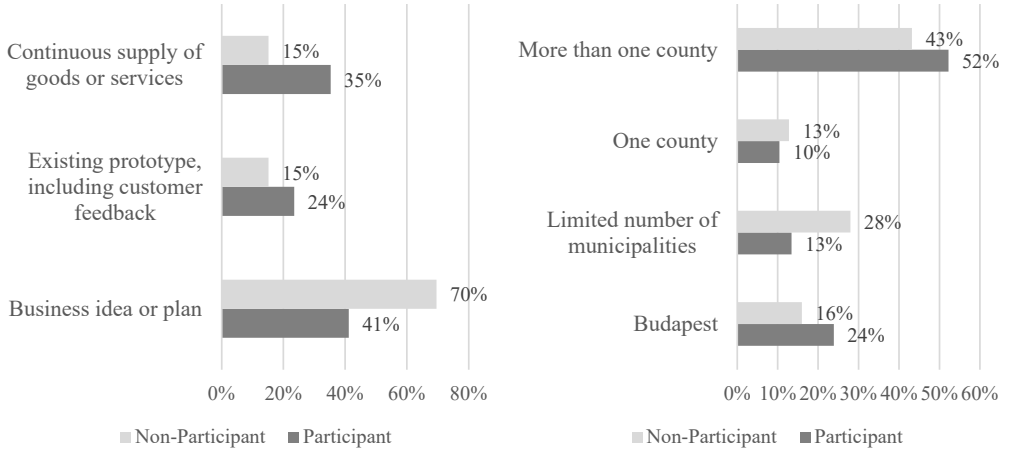
Source: own compilation, based on Erste Bank Hungary Ltd. (2017a)

Many of the participants are working in several social activities simultaneously, and most of them operate in manufacturing. The topic chosen by most applicants is people with disabilities. There is a wide range of ideas, which include the recruitment of people with disabilities to the development of accessible gardens and parks for people with reduced mobility. Extreme poverty is the second most-chosen topic. The primary focus here is to solve the problem of employment in different regions of Hungary.

Some other essential elements need to be highlighted: the table (Erste Bank Hungary Ltd., 2017b) also displays

Figure 2 and 3.

The life cycle of the applicants' projects and geographical scope of possible social impact distributed by participation



Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

the geographical scope of the potential social impact, the main topics and the life cycles of projects. The latter variable can be divided into three categories: first one, the business idea or plan, where the implementation phase of these projects is entirely missing; second, the existing prototype, including customer feedback; and the last one is the continuous supply of goods or services. Based on the geographical scope, the extent of the possible social impact of the implemented projects can be assessed. Following are the geographical extension categories in this sample: Budapest, a limited number of municipalities, one county and more than one county.

Figures 2 and 3 show the distribution of participants and non-participants, based on the life cycle and geographical scope of their projects. The successful participants have relatively more developed projects (life cycle of the products or services) than the rest of the sample. Out of the 68 participants, 24 were already in the continuous supply of goods or services phase at the time of application and 16 had an existing prototype and customer feedback. These represent 35.3 and 23.5 percent, successively, while 69.6 percent of non-participants still have only an idea. According to the Chi-square test, there is a significant association between the applicants and the life cycle of their projects ($p=0.01$).

Related to geographical extension, it seems that the only significant difference occurs for those projects where just a narrow scope of society is affected by the possible social impact. Only 13.4 percent of the participants' projects reach a limited number of municipalities compared to the 28 percent of non-participants' projects. The social impact is more effective when it reaches its target group on a large scale when it has a wide geographical scope. Two categories were created: if the geographical scope of a project was broader (Budapest, one county or more than one county), the dummy value is 1 and 0 otherwise. In this case, there is a significant association between the applicants and the geographical scope of their projects, according to the Chi-square test ($p=0.05$).

Analysis and Results

Content Analysis

Qualitative content analysis is "a research method for the subjective interpretation of the content of text data through the systematic classification process of coding and identifying themes or patterns" (Hsieh & Shannon, 2005, p. 1278). In this study, a qualitative research method is used to process data for further quantitative analysis, to enhance a more profound understanding of topics and draw inferences from them. The usefulness of combining the two methods was also underlined by Weber (1990).

Zhang and Wildemuth (2005) determined the process of qualitative content analysis in eight steps: (1) prepare the data, (2) define the unit of the analysis, (3) develop categories and a coding scheme, (4) test your coding scheme on a sample of text, (5) code all the text, (6) assess your coding consistency, (7) draw conclusion from the coded data and (8) report your methods and findings.

The content analysis of this study is based on these eight steps; the process will be presented accordingly. The text analysis relies on the table of the tender evaluation of the applicants (Erste Bank Hungary Ltd., 2017b). The table contains the extracts of applicants' tenders and the assessment of two reviewers per tender. Before the analysis, the following questions arose: (1) What is the extent of the social impact that should be reached by each project? (2) What social topics do the projects target? (3) How detailed is the business plan of social organisations? (4) Are the inputs available to implement the projects? (5) Is there a potential demand for the products or services? The last two questions became interesting because of the economic feasibility of the projects.

To answer these questions, a questionnaire of IFKA NKft. (2020) (developer of a scoring system of social enterprises) was used as a coding scheme, and an own coding scheme was also developed to be able to assess the business side of the organisations. The codes of the questionnaire were transformed during the analysis. Some topics were excluded from the model, and some new ones were added due to the new themes emerging. The coding schemes of social activity and social impact extension are as follows. Relating to the aspect of content, the extension of social activity was divided into nine categories, as visible in Table 1.

Table 1.

Categories of the extension of social activity

Signed by	Extension of social activity
A1	Employment
A2	People with disabilities, social inclusion
A3	Human, social, public service
A4	Education, competence development, awareness-raising
A5	Protection of environment, health, sustainable lifestyle
A6	Local products, services, retail, preserving heritage, rural tourism
A7	Community building
A8	IT support
A9	Fundraising for charity purposes, including reinvestment of profit

Source: own compilation, based on IFKA NKft. (2020)

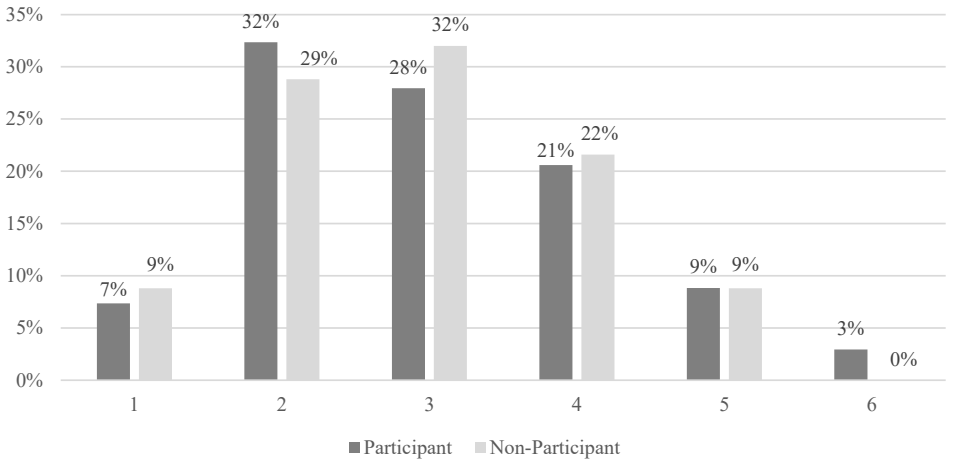
If any of the above categories were found in the text, the social organisation got 1 point; if not, 0 points were given for the project. After summarising the categories, the following calculation method was used:

$$Extension\ of\ social\ activity = \frac{\sum_{k=1}^{n} A_k}{n}, \quad (1)$$

where A_k is the activity indicator, which takes 1 if the activity was mentioned in the application, and 0 otherwise. In the equation, n is the number of potential activities, which is 9. Figure 4 shows the number of applicants categorised by their scores, where the highest score is 6 out

Figure 4.

Distribution of applicants categorised by their score of extension of social activity



Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

of 9 (reached by two applicants). According to the Chi-square test, there is no significant association between the success of the applicants and their social activity score (p=0.05).

The extension of social impact was based on a total of 26 subcategories within seven main categories, as visible in Table 2.

Table 2.

Categories of the extension of social impact

Signed by	Extension of social impact
B1	**Economic impact**
B11	Improving labour market participation/reducing unemployment, providing income to the poor
B12	Economic development
B2	**Equality impact**
B21	Development of equal opportunities
B22	A more inclusive/accepting/open/tolerant society
B23	Poverty reduction
B24	Dissemination of social innovations
B3	**Community impact**
B31	Development of individual/community skills
B32	Better social relations
B33	Strengthening social cohesion
B34	Healthier relationships/stronger families
B35	Individuals/communities able to become independent
B36	Individuals/communities able to integrate
B37	Reducing the lack of basic skills
B4	**Organisational impact**
B41	Development of the non-profit sector
B42	Development of social competencies
B43	More transparent organisations
B5	**Individual social impact**
B51	Improving housing conditions
B52	Better living conditions
B53	Easier access to food supply (better quality food)
B54	Ensuring human dignity
B6	**Cultural impact**
B61	Preservation of cultural values
B62	Preserving diversity
B63	More educated communities
B64	Better health status
B7	**Environmental effect**
B71	Healthier environment
B72	Animal welfare

Source: own compilation, based on IFKA NKft. (2020)

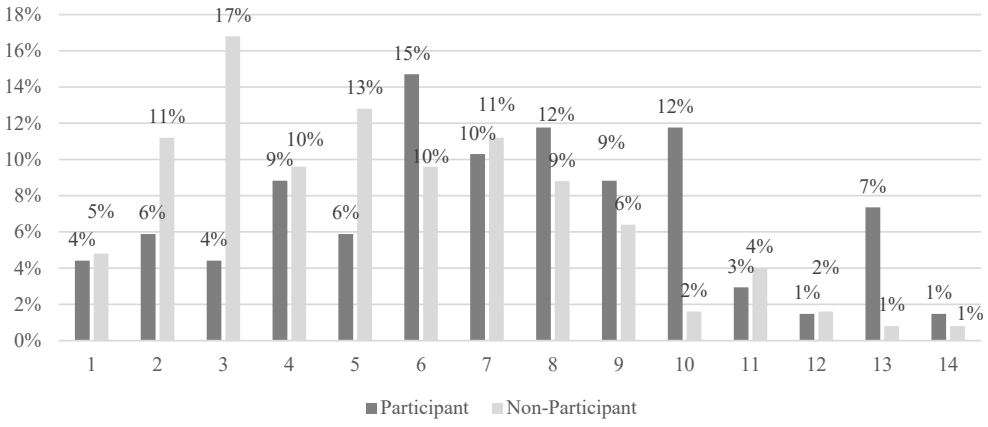
The extension of the social impact was calculated as follows:

$$Extension\ of\ social\ impact = \frac{\sum_{j=1}^{m} SI_j}{m} \quad (2)$$

where SI_j is the indicator of social impact, which takes 1 if it was mentioned in the application, and 0 otherwise. In the equation m is the number of potential social impacts which is 26. Figure 5 demonstrates the distribution of applicants by their scores, where the highest score is 14 out of 26 (reached by two applicants). According to the Chi-square test, there is a significant association between the success of the applicants and their social impact score (p=0.05).

Figure 5.

Distribution of applicants categorised by their score of extension of social impact



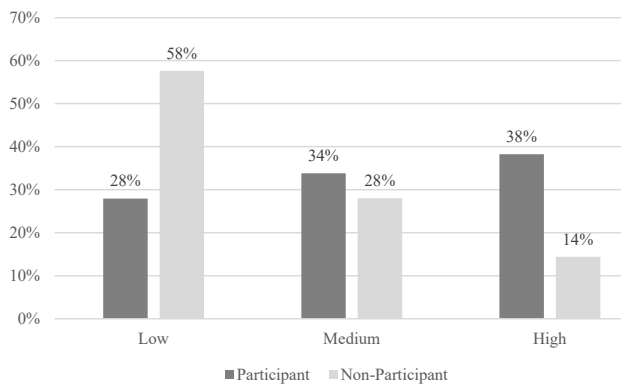
Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

In the case of the variables "business plan" and "inputs and demand", the self-developed coding scheme was used. The assessment of projects is appropriate for grouping. Within both variables, three groups are distinguished: (1) "Low", (2) "Medium" and (3) "High".

The classification of "business plan" was conducted as follows: a project was rated "Low" if the word "business plan" was not mentioned in the assessment or if it was mentioned in a negative context (e.g., very poor). "Medium" category meant that the "business plan" was mentioned by the reviewer. The projects in which the phrase "business plan" was mentioned in a positive context (e.g., very detailed) were classified as "High". Figure 6 shows the distribution of applicants by their "business plan". According to the Chi-square test, there is a significant association between the success of the applicants and the classification of their business plan (p=0.01).

Figure 6.

Distribution of applicants categorised by the classification of business plan

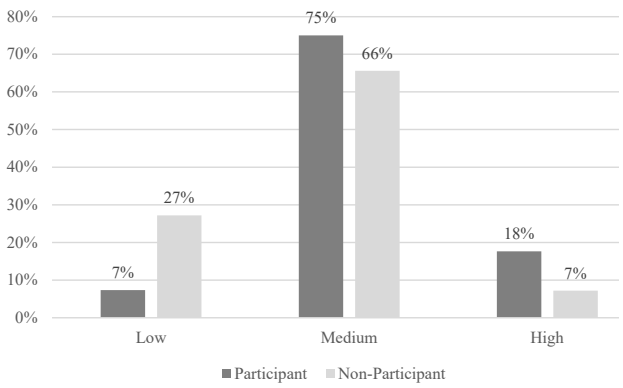


Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

The variable "inputs and demand" was classified as follows: "Low" meant that inputs (human capital, equipment, fund) and potential demand were missing in a large part based on the assessment. "Medium" occurred if inputs are partially available or there is a conditional demand for the products and services. "High" was reached by those applications which had all the inputs mostly available and there was a probable market demand for their products and services. Figure 7 represents the number of applicants categorised by the classification of the "inputs and demand" of their projects. According to the Chi-square test, there is a significant association between the success of the applicants and their classification of "inputs and demand" (p=0.01).

Figure 7.

Distribution of applicants categorised by the classification of inputs and demand



Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

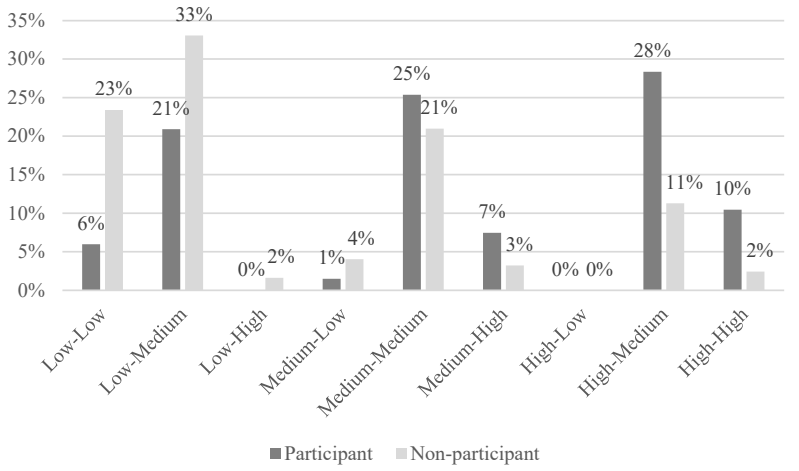
The variable "economic feasibility" is generated from these two variables: "business plan" and "inputs and demand" are combined; therefore, nine categories can be distinguished. Figure 8 shows the number of applicants based on the "economic feasibility" of their projects, where the first category refers to the classification based on "business plan", and the second based on "inputs and demand" of the projects. The variable is used as a dummy variable: if one of the two has a classification of

"Low", the project got 0. According to the Chi-square test, there is a significant association between the success of the applicants and the "economic feasibility" of their projects (p=0.01).

Three models were constructed for the analysis. Table 3 presents the variables used for the analysis; the three models differ in the measurement level of the variables and how they are included in.

Figure 8.

Distribution of applicants categorised by the classification of economic feasibility



Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

To be consistent and objective, some checkpoints are built in the analysis. The first condition is that the projects, which were included in the programme, were marked only at the end of the content analysis. Besides, some filtering was done on the data set. One of these, for example, is that if projects were grouped in category "A1" (Employment) as a social activity, then all of these projects had to be included in category "B11" (Improving labour market participation, reducing unemployment).

Regression Analysis

In logistic regression, the dependent variable (y) is binary, the value of which can be 1 and 0. In this study, the dependent variable represents the selection of an applicant in the Erste SEEDS programme: selected as a participant (success), not selected (failure).

After the content analysis, the next step is to determine which variables have an impact on an applicant becoming a participant. In the case of applications of social entrepreneurs to a programme launched by a bank, the following aspects can play an important role in the selection and, therefore, need to be considered when building the model. Because the applicants are social entrepreneurs, social activity in which they operate and the impact they can achieve are essential. The wider the geographical scope of a project is, the larger its social impact can be. Based on the life cycle, a project operating in a higher phase confirms the effort already made towards the goal of the applicant. The participants of the programme can also obtain investor relations through the bank and its programme, and are prepared for further financing with bank loans. Thus, it is necessary to take into account the economic feasibility of the projects.

Table 3.

Explanatory variables

	Model I.	Model II.	Model III.
Extension of social activity (scale variable)	x	x	x
Extension of social impact (scale variable)	x		
Economic feasibility (dummy variable)	x	x	
1 (if "business plan" and "inputs and demands" are categorised as Medium or High)			
0 (otherwise)			
Business plan (category variable)			x
Low			
Medium			
High			
Inputs and demand (category variable)			x
Low			
Medium			
High			
Life cycle (category variable)	x	x	x
Business idea or plan			
Existing prototype, including customer feedback			
Continuous supply of goods or services			
Social activities "A1" to "A9" (dummy variables)		x	x
1 (if the applicant is socially active in the defined field)			

0 (otherwise)			
Geographical scope (dummy variable)	x	x	x
1 (Budapest; one county; more than one county)			
0 (only limited number of municipalities)			

Source: own compilation

In Model I, the variables "extension of social impact" and "extension of social activity" were included in the model, as described in the content analysis chapter; see equations (1) and (2). In the case of the variable of "geographical scope", two categories were created: if the geographical scope of a project is broader (Budapest, one county or more than one county), it takes 1 and 0 otherwise. The variable "economic feasibility" was included as a dummy variable and was created based on the classification of "business plan" and "inputs and demand". If one of the two has a classification of "Low", the project got 0, assuming that the lower category projects were less preferred in the selection process. The analysis is able to determine, in terms of economic feasibility, whether higher categories are more favoured compared to the lower ones.

Table 4.

Frequency and coding of categorised variable "life cycle"

		Frequency	Parameter coding	
			(1)	(2)
Life cycle	Business idea or plan	114	0	0
	Existing prototype, including customer feedback	34	1	0
	Continuous supply of goods or services	43	0	1

Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

According to Hámori (2016), categorised explanatory variables can increase the explanatory power of the model. The projects' life cycle is taken into account through a category variable, where the reference category is the "business idea or plan". Table 4 shows the frequency and the coding of the variable "life cycle". The collinearity diagnostics confirm that in Model I, there are no problems with multicollinearity.

Model II highlights which of the social activities were more or less popular during the assessment. Instead of involving the variable "extension of social activity", categories "A1" to "A9" (Table 1) are used as dummy variables, to cover the main social activity fields. The collinearity diagnostics confirm that in Model II, there are no problems with multicollinearity.

Model III uses more categorised variables: "business plan" and "inputs and demand" are involved separately. Therefore, we can examine which variable plays a more significant role in the selection process in terms of the economic feasibility of the projects. For both variables, the category "Low" was set as the reference category. Table 5 shows the frequency and the coding of both categorised variables. The collinearity diagnostics confirm that in Model III, there are no problems with multicollinearity.

Table 5.

Frequency and coding of categorised variables: "inputs and demand" and "business plan"

		Frequency	Parameter coding	
			(1)	(2)
Inputs and demand	Low	39	0	0
	Medium	131	1	0
	High	21	0	1
Business plan	Low	90	0	0
	Medium	58	1	0
	High	43	0	1

Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

In all three Models 191 projects were analysed. Twelve applicants, of which one accepted participant, were excluded from the examination because of the too many missing variable values. In some cases, the entire extracts of applicants' tenders were missing, which are the basis for processing data for quantitative analysis. In some other cases, the "life cycle" or the "geographical scope" of the projects were not available.

Logistic regression was conducted by applying the Enter method. The assumptions of the binomial regression model are tested, all the assumptions are met. The results are shown in Tables 6–8. According to the omnibus tests of model coefficients, the new models (with explanatory variables included) are explaining more of the variance in the outcome over the baseline models. All the three models are statistically highly significant ($p<.000$).

Based on Table 6, five variables are entered in the equation, including the constant. The estimated coefficients of extension of social impact can be interpreted as follows: if the value of the extension of social impact increases by one unit, which is measured as a percentage, then the odds of being a participant in the Erste SEEDS programme is multiplied by . In the case of variable "life cycle", "only idea or plan" was selected as the reference category. The dummy "life cycle: existing prototype" is not statistically significantly different from the reference category, but the dummy "life cycle: continuous supply" is statistically significantly different with a p-value of 0.012. Compared to the reference category, being in the highest phase with the project increases the odds of being accepted significantly.

It is also shown that a more economically feasible project was more preferred in the selection process. Compared to the category where "business plan" or "inputs and demand" is classified as "Low", existing demand for the products and services, available inputs, and a detailed business plan increase the odds of being accepted significantly. The only beta value that is less than 0 belongs to

Table 6.

Variables in Model I

	B	S.E.	Wald	df	Sig.	Exp(B)
Extension of social activity	-4.029	1.743	5.342	1	0.0208	0.02
Extension of social impact	7.022	1.842	14.533	1	0.0001	1 120.50
Economic feasibility	0.972	0.377	6.650	1	0.0099	2.64
Life cycle			6.559	2	0.0376	
Life cycle: existing prototype	0.602	0.466	1.668	1	0.1965	1.83
Life cycle: continuous supply	1.093	0.433	6.374	1	0.0116	2.98
Geographical scope	0.696	0.455	2.333	1	0.1267	2.01
Constant	-2.459	0.631	15.168	1	0.0001	0.09

Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

the variable "extension of social activity", meaning that the more extensive the social activity is, the lower the chances of being accepted are. Table 6 shows that the variable "geographical scope" is not significant at 5% level in Model I.

According to Model II (Table 7), five variables are significant, including the constant. In addition to Model I, using dummy variables for social activities lets us show that category "A7" was less preferred in the selection (it is shown by negative beta coefficients), so it decreases the odds of getting into the programme. (It is also possible that projects in this field were less elaborated or could not fulfil other important criteria.) Although other categories of social activities are not significant in the model, it can be assumed that some of the categories were more popular in the assessment. In other words, being socially active in the category "Employment" (A1) was worth more than in category "Community building" (A7) in terms of the admission to the programme.

Variable "Economic feasibility" is significant in Models I and II. Based on this result, those projects that were sustainable on a business basis were favoured during the assessment. This might be due to the fact that the CSR programme was launched by a bank. Within the framework of this programme, social entrepreneurs were also prepared for further financing with bank loans. Therefore, participants could become the customers of the bank in the future. However, a bank provides credit when the probability of default of its customer is low. This could be the reason why the sustainable business model and the opportunity of earning diversified income of social entrepreneurs played an important role in the selection of participants. This context highlights the special role of the bank in a CSR programme.

Table 7.

Variables in Model II

	B	S.E.	Wald	df	Sig.	Exp(B)
Extension of social impact	5.613	2.475	5.143	1	0.0233	273.92
Economic feasibility	1.171	0.405	8.354	1	0.0038	3.23
Life cycle			8.139	2	0.0171	
Life cycle: existing prototype	1.015	0.521	3.801	1	0.0512	2.76
Life cycle: continuous supply	1.238	0.465	7.077	1	0.0078	3.45
Geographical scope	0.954	0.497	3.687	1	0.0548	2.60
A1	0.433	0.554	0.612	1	0.4341	1.54
A2	0.526	0.485	1.175	1	0.2783	1.69
A3	0.446	0.468	0.907	1	0.3409	1.56
A4	-0.886	0.455	3.793	1	0.0515	0.41
A5	-0.911	0.474	3.692	1	0.0547	0.40
A6	-0.453	0.415	1.193	1	0.2747	0.64
A7	-1.003	0.420	5.698	1	0.0170	0.37
A8	0.019	0.640	0.001	1	0.9762	1.02
A9	-0.939	0.787	1.423	1	0.2330	0.39
Constant	-2.927	0.738	15.736	1	0.0001	0.05

Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

In Model III, we can investigate economic feasibility in more detail; see Table 8.

the selection process. Variable "inputs and demand" is not significant in Model III. Based on this result, in contrast

Table 8.

Variables in Model III

	B	S.E.	Wald	df	Sig.	Exp(B)
Extension of social impact	6.404	2.584	6.143	1	0.0132	604.26
Business plan			6.180	2	0.0455	
Business plan: medium	0.411	0.487	0.714	1	0.3982	1.51
Business plan: high	1.282	0.526	5.933	1	0.0149	3.60
Inputs and demand			2.668	2	0.2634	
Inputs and demand: medium	0.808	0.616	1.721	1	0.1896	2.24
Inputs and demand: high	1.330	0.826	2.595	1	0.1072	3.78
Life cycle			7.119	2	0.0284	
Life cycle: existing prototype	0.996	0.534	3.481	1	0.0621	2.71
Life cycle: continuous supply	1.205	0.485	6.174	1	0.0130	3.34
Geographical scope	0.994	0.512	3.775	1	0.0520	2.70
A1	0.248	0.568	0.190	1	0.6627	1.28
A2	0.373	0.503	0.549	1	0.4589	1.45
A3	0.476	0.479	0.991	1	0.3196	1.61
A4	-0.874	0.480	3.312	1	0.0688	0.42
A5	-1.010	0.478	4.459	1	0.0347	0.36
A6	-0.379	0.426	0.791	1	0.3738	0.68
A7	-1.096	0.434	6.370	1	0.0116	0.33
A8	0.195	0.642	0.092	1	0.7618	1.21
A9	-0.930	0.823	1.278	1	0.2582	0.39
Constant	-3.585	0.859	17.431	1	0.0000	0.03

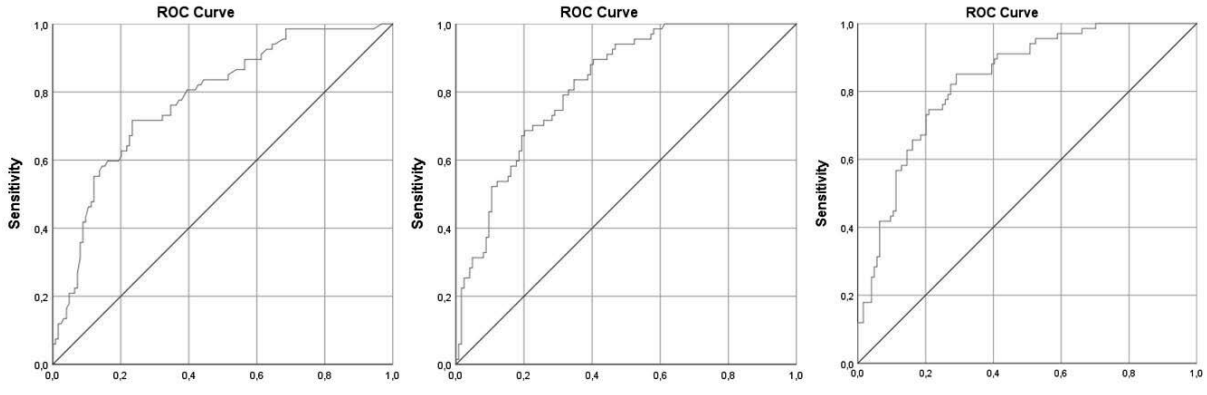
Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

The added value of Model III to the analysis is that it highlights the importance of the "business plan" of the applicants. The dummy "business plan: high" is statistically significantly different from the reference category ("Low") with a p-value of 0.015. Compared to the reference category, a project where financial sustainability is confirmed by a sound business plan was significantly more preferred in

to the projects' financial sustainability, the existence of inputs and demand did not play a significant role in the selection process. Furthermore, in addition to the variable "A7", variable "A5" is also significant in this model. Thus, being socially active in protecting the environment, maintaining good health and having a sustainable lifestyle also decreases the odds of being accepted significantly.

Figure 9a, b, c.

ROC curves for Models I, II and III



Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

Figures 9a, b, c and Table 9 show the results of receiver operating characteristic curves (ROC) and the area under the ROC curve (AUC) of the models. Curves higher away from the diagonal line correspond to a higher level of performance.

Table 9.

Area under the curve for Models I, II, and III

Model	Area	Std. Error	Asymptotic Sig.	Asymptotic 95% Confidence Interval	
				Lower Bound	Upper Bound
I	0.781	0.035	0.000	0.713	0.848
II	0.821	0.030	0.000	0.763	0.879
III	0.834	0.029	0.000	0.777	0.891

Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

In the case of Model I, the AUC value is 0.781. In Models II and III, where a scale variable, "extension of social activity", is replaced by dummy variables, "A1" to "A9", the AUC value increased slightly. Regarding Model III, the inclusion of several categorised variables further increases the AUC value. According to Hosmer and Lemeshow (2000), while Model I presents an acceptable performance level, Model II and III are considered to portray excellent discrimination. Based on Hosmer and Lemeshow tests (Table 12), the models adequately fit the data.

Table 12.

Hosmer and Lemeshow Test for Models I, II, and III

Model	Chi-square	df	Sig.
I.	9.830	8	0.277
II.	5.814	8	0.668
III.	3.596	8	0.892

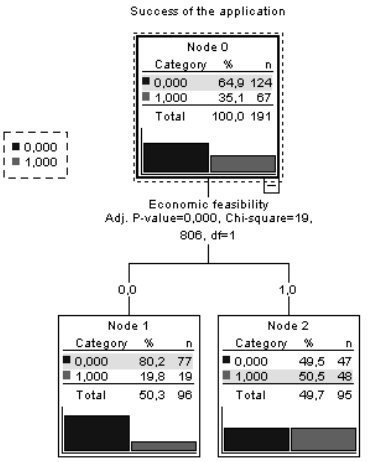
Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

Three decision trees are created to find the strongest interactions between the dependent variable (success of the application) and the independent variables used in the three logit models above. The analysis identifies the characteristics of groups of applicants and the classification rules for the selection process. The CHAID (Chi-squared Automatic Interaction Detection) method uses Pearson's Chi-squared to decide on variable splits.

Figures 10 and 11 show the tree-based classification model of the variables for Models I, II and III. Using the explanatory variables of Model I and Model II, we get the same results: the parent node containing all applicants splits only into two child nodes, one contains the projects with lower classification, the other incorporates those projects which are classified as "Medium" or "High", in terms of their economic feasibility. According to the results, a higher "economic feasibility" increases the probability of getting selected in the programme (50.5 percent). It is notable that this is not sufficient to meet only this one condition to be a participant, as the group includes almost the same proportion of non-participants (49.5 percent).

Figure 10.

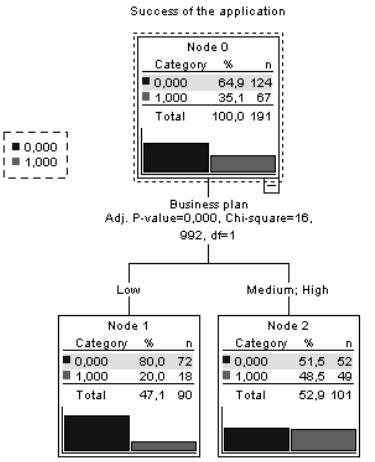
Decision tree for Models I and II



Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

Figure 11.

Decision tree for Model III



Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

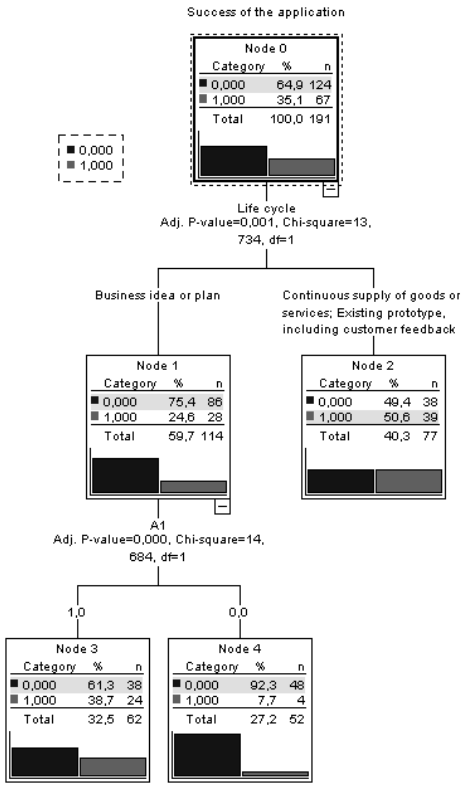
Based on Figure 11, only the variable "business plan" has a strong interaction with the dependent variable (success of the application) in Model III. Results show that although the existence of a sound business plan significantly increases the chances of being a participant in the programme, but it is not guaranteed.

The third tree (Figure 12) shows the result of Model III when the variables "business plan" and "inputs and demand" (which refer to the economic feasibility of a project) are excluded from Model III. In this case, "life cycle" is the predictor variable used for the primary split. If social entrepreneurs already have an existing prototype or a continuous supply of goods or services, the probability of being a participant is 50.6 percent; otherwise, it is only 24.6 percent. However, if a social entrepreneur had only a business idea or plan, this probability is increased by

14.3 percentage points, if they are socially active in the field of employment. If the entrepreneur does not operate in this field, the probability of getting admitted is cut to 7.7 percent.

Figure 12.

Decision tree for Model III excluding the economic feasibility of the projects



Source: own compilation, based on Erste Bank Hungary Ltd. (2017b)

According to the decision tree analysis, the most important classification rule in the selection was the projects' economic feasibility and, especially, the elaboration of the business plans. In addition, we can also see hidden preference for a specific field of activity, like employment.

Conclusion

We analyse the relationship between the odds of enrolment in a development programme and success factors for social entrepreneurs in the application for Erste SEEDS programme. We find three critical success factors: the extension of social impact, financial sustainability and the life cycle of the projects.

For the successful selection of an applicant, it is essential that the extension of a project's social impact be as wide as possible while the applicant should be socially active in a limited number of areas. Financial sustainability is also necessary, even in the case of social entrepreneurs. Thus, it is advisable to have a detailed business plan at the time of application. The life cycle of the projects is also decisive: the more advanced the implementation of a project, the greater the odds of being a participant. If the social entrepreneur has only a business plan or idea, the probability of getting selected is dramatically higher, especially if they are socially active in the field of employment. It seems that community building, protection of environment, health and sustainable lifestyle were less preferred than the other activity areas, like employment or social integration.

Results show some hidden preferences in the review process, especially in terms of economic feasibility; these preferences were not stated directly in the call for applications. These findings can be of interest not only for future applicants and for the decision-makers responsible for the fine-tuning of the Erste SEEDS programme, but also for other banks designing their own CSR schemes.

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IRIS LAUDITH SOLANO CAHUANA

WOMEN'S SCARCITY IN ACADEMIC GOVERNANCE – GENDERED IDENTITY OR GENDERED PROCESSES?

A NŐK ALACSONY RÉSZVÉTELE AZ EGYETEMEK VEZETÉSÉBEN – NEMI IDENTITÁS VAGY NEMI FOLYAMATOK?

This article contributes to the empirical evidence for women's scarcity in academic governance. The study evaluates to what extend women lean towards non-management careers and dismiss opportunities to attain executive roles in Colombian public universities, as well as the support received when they break the paradigm. The purpose was to determine whether gendered practices are ingrained in the designation process or whether women's scarcity is the outcome of individual attributes/choices and collective perceptions of inadequacy. Data was collected from universities' proceedings, opinion polls of rectors' designations, and candidates' curricula. Findings show low female candidacy rate but high public support for female candidates to the rector's seat among all universities examined. Also, curricula's in-depth analyses display women's preference for male-dominated careers and analogous academic/administrative experience to that of male candidates. Hence, the results challenge explanations presented by human capital and congruity prejudice theories, while leaning towards gendered processes and identities.

Keywords: **gendered practices, prejudice, career/occupational segregation**

E cikk eredményei a nők egyetemi vezetésben való alacsony részvételével kapcsolatos tudományos eredményekhez járulnak hozzá. A cikk kolumbiai állami egyetemek példáján vizsgálja meg, hogy mennyire jellemző a nőkre az, hogy nem vezetői karriert választanak maguknak, vagy visszautasítják a felajánlott vezetői pozíciókat; illetve, hogy milyen támogatást kapnak akkor, ha mégis szembe mennek az erre vonatkozó általános trenddel. A kutatás annak feltárására irányult, hogy a nők alacsony részvételének oka a kiválasztási folyamatokba ivódott nemi megkülönböztetésben keresendő-e, vagy inkább az egyéni tulajdonságok és választások, illetve a nők alkalmatlanságára vonatkozó kollektív észlelések okolandók ezért. Az elemzés az egyetemek kiválasztási eljárásrendjeiből, a rektori kinevezésekhez kapcsolódó közvélemény-kutatásokból és a jelöltek életrajzaiból származó adatokon alapult. Az eredmények azt mutatják, hogy az összes vizsgált egyetemen alacsony a női jelöltek aránya, de a rektori székbe kerülő nők a közvélemény nagy támogatottságát élvezik. Az életrajzok elemzése feltárta, hogy a nők nem utasítják el a karriert a férfiak által uralt területeken, valamint nők is rendelkeznek a férfi jelöltekéhez hasonló tudományos/adminisztratív tapasztalattal. A kutatás eredményei megkérdőjelezik az emberi tőke és a kongruitásra vonatkozó elméletek magyarázatait, miközben igazolják a nemek által befolyásolt folyamatok és identitások elméleteit.

Kulcsszavak: **nemre jellemző gyakorlatok, előítéletek, karrier/foglalkozási szegregáció**

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Author/Szerző:
Iris Laudith Solano Cahuana, PhD candidate, Corvinus University of Budapest, (solanocahuana_1987@hotmail.com)

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Scholarly research has provided ample evidence of women's growing presence in the labor market worldwide but a persistent under representation in the executive level. In Latin-American nations, for example, women represent 25% of the labor force in directive positions, according to data collected from economic, business and service sectors, where Latin-American women frequently work (Maxfield, Cárdenas, & Heller, 2008; Cardenas, et al., 2013). However, little attention has been given to their trajectories inside the academic organizational setting. As a contribution to this gap, the United Nations International Institute for Higher Education in Latin America and the Caribbean revealed that just 18% of all universities in the region, have women rectors (UNESCO-IESALC, 2020). In Colombia, only four out of eighty-seven accredited universities have women as rectors, two of them in public universities (SNIES, 2020). When asked about influential factors behind this underrepresentation, one of these female rectors claimed that due to the stigma surrounding women's leadership skills, it is harder for women to attain directive roles, thus, good academic preparation would be the only path to guarantee women's access to executive seats. Another female rector pointed out the passive resistance of some directive boards to promote women to executive roles as a stronger influential factor (Guía académica, 2019).

To address this information gap, the present research evaluates women's limited professional promotion to the highest echelons of academic governance from different theoretical frameworks that take into account individual and organizational notions of gendered beliefs, identities, choices, and practices. Consistently, empirical data is elicited to determine 1) whether institutional designation procedures and requirements foster the exclusion of female candidates, 2) whether recent female application rates for leadership roles reflects a voluntary exclusion from high responsibility roles, 3) whether the professional profile of female applicants is deficient in terms of academic background and administrative experience when compared to men's profiles, and 4) how these assumed differences influence the community's support.

The paper is structured as follows: First, a short description of the Latin-American culture is provided as an overview of its cultural and social values around the subjects of gender and work followed by key theoretical referents and research questions. In the third section the methodology implemented is explained while the analysis of findings is covered in the fourth section. Finally, section five includes conclusions and suggestions for further research.

Latin-American culture

In their research about women and corporative life in Latin-American culture, Sylvia Maxfield and her colleagues (2008) explained how in this region hierarchy is widely accepted, social status is highly important and collectivistic values are strongly tied to family obligations. The culture is also surrounded by stereotypes of *male chauvinism* or *machismo* and *female marianismo* where men are seen as physically strong protectors, while women are most appreciated by their beauty, purity, and self-sacrifice.

It is also important to highlight that cultural heterogeneity is a constant in the Latin-American region not only in terms of race and ethnicity, but also regarding political authority and economic development. Even inside countries, culture varies according to the geographical location of the communities. In Colombia, for example, coastal cities and those closer to the mountains are politically, culturally, and economically different. Yet, in general, the work culture is flexible, creative, and somehow chaotic due to a lack of clear guidelines or the widespread practice of "exceptions". Overall, when friendship is involved, rules can be broken and spontaneity is customary, thus moving the family-loyalty model to the workplace (Ogliastri, 1998).

Similarly, there is skepticism towards civil legislation, which is perceived as political machination and administrative judgement. Therefore, informal networks are crucial and informal strategies aiming at cultural change might succeed, but affirmative actions, like gender quotas, are bound to fail (Maxfield, Cárdenas, & Heller, 2008).

Theoretical foundations

To explain female underrepresentation in executive roles different analogies and theoretical approaches have been proposed overtime. The most popular analogy is "the Glass Ceiling" metaphor, which refers to barriers at the end of the professional trajectory restricting women's access to the highest hierarchical levels. But the most recent analogy is "the Labyrinth" (Eagly & Carli, 2007a, 2007b), which conveys the idea of a complex journey filled with both subtle and evident barriers in the multiple paths leading to the top.

Likewise, dominant theoretical approaches to gender and organization have expanded through different perspectives of inequality. Approaches with an individual lens give priority to personal beliefs and judgements, the notions of gender roles and their manifestations in the organizational distribution of positions (Calás, Smircich, & Holvino, 2014). On the other hand, approaches with an organizational lens investigate how recruitment, evaluation and promotion practices might generate gender stratifications. Yet, since organizations are immersed in societies with specific values and ideologies, a proper theoretical framework should examine the individual, the organizational context, and the larger social system in which they function (Fagenson, 1990). Thus, theoretical referents addressed in this study are divided into individual and organizational perspectives interplayed with a social perspective.

Individual perspective

Human capital theory and occupational segregation

Human capital comprises activities, such as schooling or on the job training, that influence future income and

benefits by increasing people's resources (Becker, 1993). Thus, as an economic theory, it attended to the analysis of wage gaps. However, Solomon Polachek believed it could also explain occupational sex segregation, where women would self-exclude from certain careers and from high responsibility positions in order to cope with domestic responsibilities. His statements were based on the premise that women planning discontinuous employment would prefer occupations with lower penalties for time spent outside the labor force (Polachek, 1975, 1976, 1979). Berry (1983) agreed that women might be willing to work in female-dominated occupations (e.g., nursing, social services) despite their lower status and lower pay rate because they provide more opportunities to combine work and family life.

The approach appears reasonable considering that low appreciation jobs, characterized as female-dominated jobs, usually offer higher starting wages, which would make them attractive to women planning to work for short periods of time. However, there is not enough evidence to support these statements, indeed, empirical evidence show that women have higher wages when employed in male-dominated occupations and that many women with continuous employment history also choose female-dominated occupations (England, 1982). Moreover, international data displays a new tendency, where female preferences for traditionally male-dominated occupations is growing (World Economic Forum, 2020).

Stereotypes, prejudice, and gendered identities

Gender stereotypes are considered mayor influential factors for women's underrepresentation in leadership roles, mainly because they can impact people's perceptions of suitable leaders as well as a person's willingness to lead (Chen & Houser, 2019). According to the *stereotype threat theory* (Steele & Aronson, 1995), the *stereotype boost theory* (Shih, Pittinsky, & Ho, 2011) and *the role congruity theory* (Eagly & Karau, 2002), when a woman is in an all-female group or is required to perform tasks that are congruent with female expectations, she will experience less gender stereotype effect (GSE) and will be more willing to assume leadership roles. On the other hand, when a woman is placed in a male-dominated group or is asked to perform tasks that are incongruent with female gender expectations, "her female identity will become more salient and she may hold back or be overlooked for promotion opportunities as a consequence of shying away from leadership" (Chen & Houser, 2019, p. 2).

To elaborate on these gender-based expectations and their impact on gendered identities, it is necessary to further explain *the congruity theory of prejudice* (Eagly & Karau, 2002). This theory describes normative beliefs about attributes and behavioral patterns expected from each sex and analyzes how prejudice labels women as less qualified for leadership roles because of family responsibilities or lack of traits and motivations to attain positions of power (Greenhaus & Parasuraman, 1999) as can be seen in Figure 1.

Figure 1.

Fundamental notions of the congruity theory of prejudice

Source: author's own schema based on Eagly & Karau (2002)

Recent research also argues that these "gender stereotypes that can produce prejudice against women as leaders can also serve as self-fulfilling prophecies that undermine women's confidence in their own leadership ability and ambitions" (Cardenas et al., 2013, p. 6). In Latin-America, women executives acknowledged the challenges posed by male chauvinism or machismo and domestic responsibilities not only in the practical sense of daily routines but also in their potential to foster employers' prejudice and workplace discrimination particularly at higher levels. Still, most successful Latin-American women executives deny having experienced discrimination themselves (Maxfield, 2008), and managed to fulfil cultural expectations through creative personal solutions to domestic responsibilities for example by hiring domestic help or relying on extended family support.

Overall, successful Latin-American women executives attribute their accomplishments to individual effort, hard work and personal performance. So, they do not make excuses for the difficulties/barriers faced but at the same time, they fail to realize that their struggles were not unique, and that gender stereotypes and organizational discriminatory practices are indeed a serious issue affecting all women pursuing professional advance (Cardenas et al., 2013).

Organizational perspective: Gendered organizations

The historical division of power in social institutions can be ascribed to the distinction between production and reproduction, where business and industry (production) are perceived as the source of well-being and wealth, while child/elder care and education (reproduction) are devalued as wealth consuming. Therefore, non-work life is categorized as peripheral to the organization's interests, yet it strongly influences organizational practice, ideologies, and distributions of power (Acker, 1992).

The most evident manifestation of the gender-divided social influence is the higher representation of women in specific occupational positions, which was initially addressed as the result of individual self-segregation patterns. But evidence from different Latin-American nations highlights horizontal (within different occupations) and vertical (within positions of power) segregation at the organizational level, which are incongruent with the profiles of their labor force. Hence, it assumes structural patterns of discrimination that would categorize the organizational

performance as essentially gendered.

For instance, in Argentina, Venezuela, Brazil, Colombia and Mexico, women are highly represented in human resources, services, sales, and social work which are perceived as female jobs for being congruent with communicative skills and caring functions traditionally attributed to women (Arango, Viveros, & Bernal, 1995; Valenzuela & Reinecke, 2000). But their presence in the directive level does not reach 30% despite their high education levels in pipeline fields such as engineering, management, accountancy, law and systems analysis (Avelar & Zabludovsky, 1996). Therefore, "there is a relation between social roles traditionally attributed to women and their assigned positions inside the organizational setting" (Maxfield, Cárdenas, & Heller, 2008, p. 84).

In the specific case of Colombia, female participation in the labor force also includes the industrial and financial sectors, and when compared to other Latin-American countries, the number of women in the executive level is also higher (PNUD, 2000), but their proportion is still small with respect to the male share. Thus, hidden patterns of discrimination in the recruitment and promotion processes are assumed. It is important to reiterate that, overall, Latin-American female executives do not perceive organizational recruitment and promotion practices as contributors to inequality patterns, except in a few male-dominated sectors.

This study explores the issue at hand from multiple angles, to further assess women's occupational choices, their proportion in executive roles and their counterparts' collective perceptions in the Latin-American region and particularly in Colombia. Moreover, since most scholarly research have focused on private organizations from business, political, and industrial sectors, this study is centered in an organizational setting generally neglected in the literature: higher education institutions.

First, the analysis involves an evaluation of whether *women's application rate to the executive role of university rector and their preferences for certain professional disciplines reflect individual perceptions of gender appropriate social roles and lack of ambition.* The executive role of university rector was selected as focus of analysis because it is the only position, whose designation process requires the participation of all the organization's members and involves elective and appointment stages.

Then, considering stereotype and congruency theories; it is assumed that women do not compete for executive roles and when they do, they are dismissed during the election process or receive minimal support. So, collective opinions are also examined to determine *to what extend do the designation process and the academic community's support rates reflect a dismissal for female candidates.* Finally, incongruent images of appropriate gender roles and leadership also assume that male candidates would be more involved in political roles and that female candidates would accumulate lower administrative experience (human capital) overtime. Therefore, women's opportunities are assumed to be limited in professional practices and in political roles as well. To address this concern, the third question inquiries about *the impact of academic level and administrative experience in the amount of support that candidates receive.*

Research methods

Due to the lack of research insights into gender equality in academia, this study is specifically oriented towards the analysis of women's executive representation in universities. The organizational setting was selected because, even though all Colombian universities are legally granted institutional autonomy (Ley 30, 1992) to designate their academic and administrative authorities, only public universities as opposed to private universities, have similar directive boards' composition, functions, and requirements. Hence, offering a valuable opportunity for comparative analyses.

Overall, there are eighty-seven accredited universities in Colombia, thirty-two of them are categorized as public universities (SNIES, 2020). Yet to evaluate the data under a gender-based lens, the study focused on cases that included female and male candidates in their last rector's designation process. It is important to state that all public universities went through that process between 2017 and 2020 as more rectors are designated for periods of three or four years. The designation process of public universities is explained on Table 1.

Table 1.

Mainstream stages for rector's designation in Colombian public universities

Stage	Description
1	– Call for application including specific requirements (e.g., educational level, administrative experience, etc.) – Registration of candidates, – Assessment of candidate's curriculums with supporting documentation to define compliance with the requirements.
2	– Presentation of candidates' profiles and their government proposals to the academic community (through online news reports or live discussion forums), – Opinion polls where students, teachers, administrative staff, and alumni members vote to short-list (3 to 5) applicants, – Presentation of short-listed candidates to the Board of Directors.
3	– Board of Directors designates as rector the candidate that obtains more than half of the votes of the board members (absolute majority).

Source: author's own schema based on empirical data from application calls and general statuses

To evaluate the data, document analysis was selected as research method because organizational files are valuable sources of information regarding recruitment and promotion practices, workforce' professional profiles, and events' outcomes. Moreover, documents deriving from organizations and public inquiries are likely to be authentic and meaningful (in the sense of being clear and compre-

hensible), hence, they do not incorporate issues of credibility and representativeness (Bryman, 2012).

Then, descriptive statistics are conducted to facilitate the revision of the findings, since most of the data include numerical information and the cluster of essential categories for multiple research subjects. The evaluation encompasses organizational practices, application rates by gender, professional profiles of candidates and collective support rate of selected organizations.

Data

The selection of analytic categories was based on the application requirements of all public universities in Colombia, which contain different combinations of the following elements: Colombian citizenship, university degree, disciplinary and criminal clean records, administrative and academic experience, and a governmental plan.

From these options, only half of the universities clearly specified that candidates must not have convictions, disciplinary sanctions, legal impediments nor conflicts of interest to apply for the rector's position. Twenty-five percent (25%) of them explicitly required a governmental plan, and few cases included additional requirements such as age limitations (10%) or proficiency in a second language (3%). However, all Colombian public universities required a university degree to apply for the role of rector, sixty percent (60%) of them further specify a graduate degree requirement. Similarly, more than ninety percent (90%) of these academic organizations required minimum teaching/research and administrative experience alternating between 3, 5, and 10 years. Thus, aiming at data uniformity to foster comparative accuracy, only the categories of academic background represented by university degrees, and the professional experience represented by administrative and academic experience are carefully assessed in this study.

For the selection of participants, a criterion-based sampling (Goertz & LeCompte, 1984) was established, to address the female underrepresentation issue. Hence, aiming at comparative cases, only, universities that had both female and male candidates in their most recent rector's designation were included in the research. The process started by examining organizational public records (statuses and internal regulations) of designation proceedings for directive positions. The information was then compared to establish similarity patterns, which are further explained in the discussion section. Then, detailed data was gathered from all public universities' most recent calls for application and from official reports of registered candidates, published by every university's General Secretary Office.

Selected cases include 11 universities whose final candidates' list contained female and male applicants. The total sample comprises 65 candidates whose curricula were compiled for further examination in terms of academic background and professional experience with a particular focus on administrative experience. Data was obtained from different sources starting with the researchers' database of the Colombian Ministry of Science, Technology, and Innovation (CVLAC), but also from universities' websites, the government's curriculum database of civil servants (Función Pública), LinkedIn, and candidates' professional webpages and academic blogs.

For the evaluation of collective opinions within different sectors of the academic community, official reports were collected from selected organizations and their voting results were categorized in relation to all participating sectors, for instance, students, academic and administrative staff, and alumni members. The purpose was to evaluate the assumption that differences in the candidates' professional profiles might affect the support rates received from their academic communities. Thereupon, different categories of educational attainment, administrative experience, and actual voting results are compared.

Data Analysis: Cross-Tabulations

Descriptive statistics based on cross-tabulations or contingency tables were implemented, because they facilitate the process of summarizing relationships and can show the proportion of application rates by subgroups in a manageable format. Next, an analysis of candidates' occupational preferences is assessed to determine relationships within the data. First by determining gender differences for the most selected disciplines (career segregation), the most selected administrative sector within the broad categories of academic, public, and private (occupational segregation), and the accumulated years of experience. Then, overall preferences for male or female candidates are evaluated based on the number of votes received, which indicate the level of support of the academic community. Results are categorized between shortlisted and most voted candidates.

Finally, more specific data were included to examine the influence of higher levels of academic background and administrative experience in the amount of support received by the candidates. The goal was to determine whether higher academic preparation or sector specific professional experience leads to higher candidacy support independent of the applicant's gender or whether gender has a stronger impact regardless of the professional profile.

Results

Designation of University Rectors

The organizational proceedings for the designation of rectors does not include any explicit requirements that might openly segregate or exclude women from the candidacy pool. The educational level, for example, does not specify any required professional field of expertise and the expected minimum experience is feasible.

On the other hand, the subjective selection that takes place during the implementation of opinion polls might represent a barrier to the selection of female candidates, as socially internalized perceptions of leadership characteristics and gender-appropriate jobs could influence the results (Bosak & Sczesny, 2011; Korabik, 1999; Powell, 1993).

Also, in organizations with a score evaluation system, candidates' academic profile with a focus on non-manage-

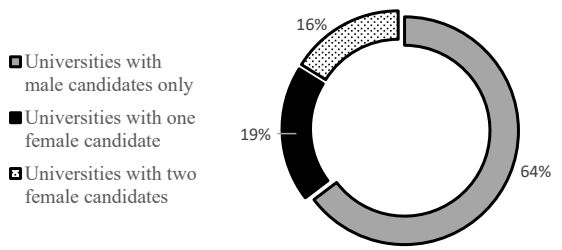
ment related careers, as well as sector specific administrative experience might also put women at a disadvantaged position. This assumption is based on the theoretical claim that incongruent perceptions of women as suitable leaders (Eagly & Karau, 2002) might restrain their opportunities to acquire experience in sector specific roles, such as political positions.

Women's application rate to the executive role of university rector

News reports from general secretary's offices show that, in the most recent election of all universities (see Figure 2), eleven (11) out of thirty-two (32) universities had female candidates (34.3%) and those with more than one female candidate account for a total of five universities (16%). Reports also show that all three cases in which women were successfully designated as university rectors are associated to groups of candidates that included two women. In the other two cases with two female applicants the designation was achieved by re-elected rectors aiming at a second term, which is a standard organizational practice. So, the assumption about women's apathy for competition is only partially true since there is evidence of a considerable proportion of female candidates. Therefore, women's low applications are common, but not widespread.

Figure 2.

Application rates



Source: author's schema based on news reports from the general secretary's offices (2017-2020)

It must also be noted that all cases in which women applicants won the designation process took place within universities that have had female rectors before. Thus, their presence in executive roles was not a novelty. Hence, taking into consideration the influential power of role models for social learning and behavioral change (Bandura, 1977; Morgenroth, Ryan, & Peters, 2015), a thorough evaluation of the professional trajectory of those women, who chose to break the paradigm and aim higher, is the best option to elicit valuable insights to processes, limitations, advantages that help explain the circumstances around the persistent scarcity phenomenon.

Candidates' professional profiles

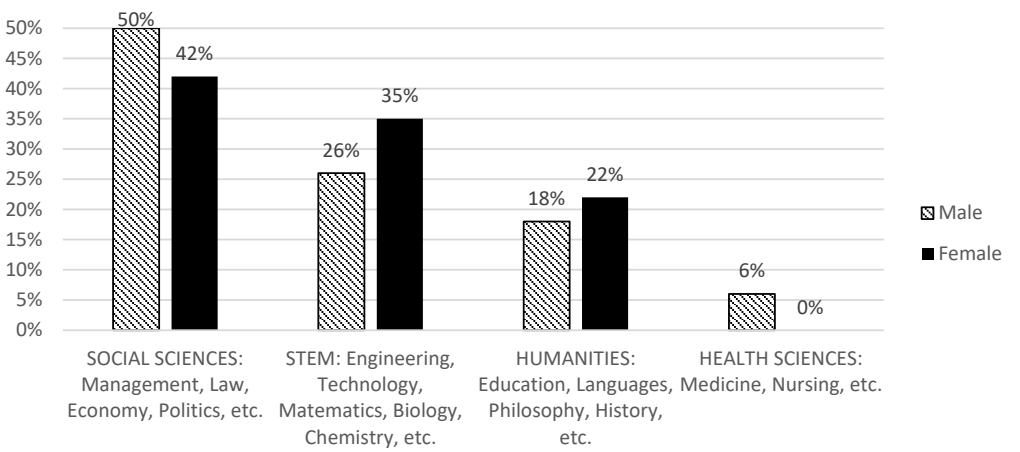
To address the question of different preferences for professional disciplines among women and men as a reflection of individual perceptions of gender appropriate social roles, official data from the Gender Gap Index (World Economic Forum, 2020) were consulted and compared to empirically collected data. Results corroborate the Index' findings that a growing number of Colombian women choose careers in business, law, and science, technology, engineering, and mathematics (STEM) fields (see Figure 3).

Figure 3 displays social sciences, such as management, law, economy, and politics, as the most selected areas for both female and male candidates, followed by STEM related disciplines. In fact, there is a higher representation of women in STEM fields than of men. Similar patterns can be seen in education fields, which is not rare considering that the organizational setting analyzed in this study is academic-oriented. Finally, none of the female candidates had a professional profile linked to health sciences which differ from the socially expected role of care-related interests.

To examine the highest level of education reached, the total number of candidates were distributed according to the graduate categories of 1) specialization, which usually takes up to a one-year of graduate-level training in specific subjects; 2) masters, which can take between 1 and two years of graduate-level schooling and 3) PhD,

Figure 3.

Preferred professional disciplines



Source: author's own schema based on empirical data from candidates' currriculum vitaes

which can take between 3 and 5 years of academic and research work (see Table 2).

Table 2.

Candidates' highest graduate level

	Specialization	MA	PhD	Total
Male Candidates	2	26	20	48
Female Candidates	-	6	10	16
Total	2	32	30	64

Source: author's own schema based on empirical data from candidates' currriculum vitaes

The classification presented in Table 2 indicates a higher number of male candidates in all graduate levels, but when comparing the categories within groups the results show that only at the master level do male candidates (54%) transcend the percentage of representation of female candidates (37.5%). At the doctoral level, over sixty-two percent of all applying women (62.5%) had a doctoral degree as opposed to forty-two percent (42%) of all male candidates. In fact, having less women with masters and no women with specializations as their highest academic degree denote their deliberate efforts to consolidate stronger professional profiles. From the sample, one male candidate was not included in the table because his highest graduate level was a bachelor's degree.

Therefore, career choice (or occupational segregation for that matter) and lack of human capital are not adequate explanations for women's executive scarcity in this particular setting. Moreover, choices displayed in the sample of female candidates dissent from theoretical statements claiming women's voluntary segregation from management-oriented or historically male dominated fields in order to avoid high-responsibility roles.

Support rates

But the individual perspective is not the only influential factor under consideration, people's endorsement power also plays a crucial role in the professional promotion of women. Consequently, voting results from every academic community's opinion polls were also inspected to determine latent resistance towards female candidates.

Initial data analysis required the establishment of mean values for the total amount of votes reported in every organization. Mainly because the number of students usually is bigger than the number of other staff members, so average values can offer a clearer picture of the community's preferences. As a result, general calculations indicate an average of 15785 (24.9%) votes for male candidates and 5586 votes for female candidates (24.9%), which represent a parallel percentage of preferences regardless of the candidates' gender.

Subsequently, after confirming that women's candidacy is not dismissed by the community's opinion, it is necessary to verify if the support received is enough to promote women's advance to the next designation stage (see Table 3). Therefore, data on shortlisted candidates are also compared. The guidelines to shortlist candidates may vary slightly from one university to another but generally the indications include one of the following: three (3) or five (5) most voted candidates, all candidates who obtained ten percent (10%) of teachers' and administrative members' votes plus fifteen percent (15%) of students' votes, fifty percent (50%) plus one of the most voted candidates, or all candidates who reach a total support of twenty percent (20%).

Table 3.

Higher support rates

Total Candidates	Shortlisted	%	Most voted	%	Designated Rector
Female: 16	12	75	2	12.5	3
Male: 49	23	47	9	18.3	8

Source: author's own calculations based on organizational records of opinion polls

Table 3 shows that twelve out of sixteen female candidates were shortlisted in the elections, thus over seventy-five percent (75%) of the female candidates successfully passed to the next stage of the designation process. It is also noteworthy that only two female candidates were the most voted. However, since the electoral process functions only as an indicator of the academic community's preferences without conditioning the directive board's decision; being the most voted candidate is not equivalent to winning the designation process. In fact, one of the three women designated as rector was the most voted candidate, but her designation was annulled immediately after the official public announcement (Arenas, 2019) leading to a new designation process that has extended for several years due to multiple organizational factors that will not be addressed here on account of extension constrains. To date there is a total of two female university rectors in the entire set of Colombian public universities, which opens the floor to questions about potential barriers at the last stage of the process where directive boards vote and designate the winner.

Impact of academic background and administrative experience in the support rates

The last question proposed in this study is framed within the arguments of the human capital theory, by examining the potential relation between candidates' level of academic preparation and professional experience in sector-specific administrative roles with the amount of support received. The assumption is that candidates with a higher degree of education and/or more experience in administrative roles will be perceived as more suitable for academic leadership roles and will receive more votes in the polls. The rational for these assumptions is that doctoral degrees and more experience would be congruent with the perception of a committed professional in the academic field. In addition, it was expected that doctoral degrees might represent an advantage for male candidates whose reduced responsibilities in the private spheres might facilitate their pursue for higher academic levels. If that was

the case, female candidates might be perceived as less committed to academic life and consequently less suitable for a managing role inside that setting.

The preliminary analysis of candidates' highest academic level and overall years of experience illustrates women's deliberate efforts to consolidate stronger professional profiles and analogous average experience for both groups ranging between 12.4 years for female candidates' average total experience and 12.9 years for male candidates' average total experience. To identify these values the number of administrative years of experience accumulated by all female candidates and by all male candidates was divided by the total number of candidates in their respective subgroup, for instance 48 men and 16 women. One of the male candidates was excluded due to incomplete data for administrative experience. The number of years invested in administrative roles was determined according to the timeframe reported in the candidates' curricula for starting and ending dates of all administrative position held over their professional trajectories.

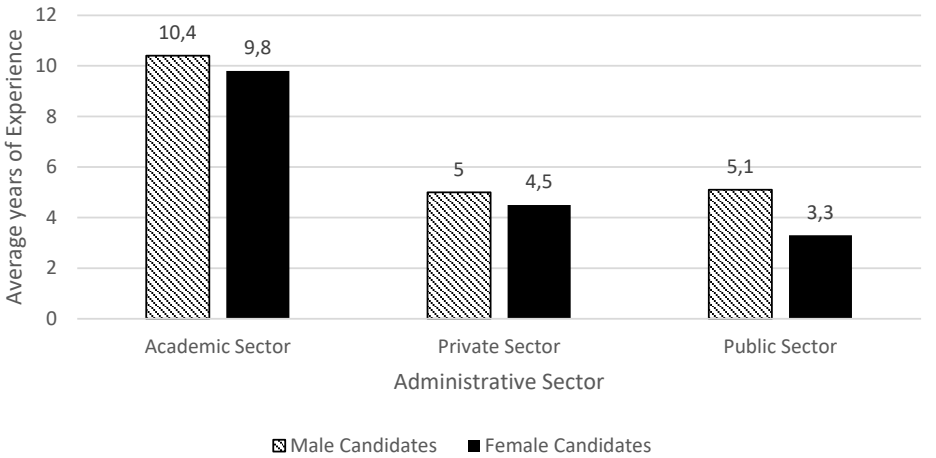
regional governments or national public entities other than academic organizations (e.g., ministries) with average administrative experiences of 5.1 years for male candidates and 3.3 years for female candidates.

To evaluate the impact of the professional profile in the amount of support received, candidates were divided by clustered sectors in which they have participated (see Table 4). The rational for this final distribution was to determine whether academic experience alone was perceived as strong enough to influence high levels of support or whether a combination with experience in the private and/or public sector would bring about more positive outcomes.

In general, except for one male applicant, all candidates have experience in academic administrative roles, and half of contestants of each group (56% and 50% respectively) have exclusively worked in this setting. It can also be noticed that a higher percentage of women labored in the private sector (31% as opposed to 14.5% of men) and that similar circumstances apply to the higher pres-

Figure 4.

Administrative experience averages



Source: author's own schema based on empirically collected data from candidates' currriculum vitaes

In short, it could be interpreted that the overall accumulated experience of both groups is similar. However, after a close observation of the participants' sector specific experience (see Figure 4), different levels of mean values were identified but the most evident variation was found for public positions such as administrative roles in local,

ence of men with administrative experience in the public sector. Since none of the participants reported exclusive experience in the public sector and since no female candidate reported exclusive experience in the private sector, those two categories will be omitted in the following analyses.

Table 4.

Administrative experience (Sector)

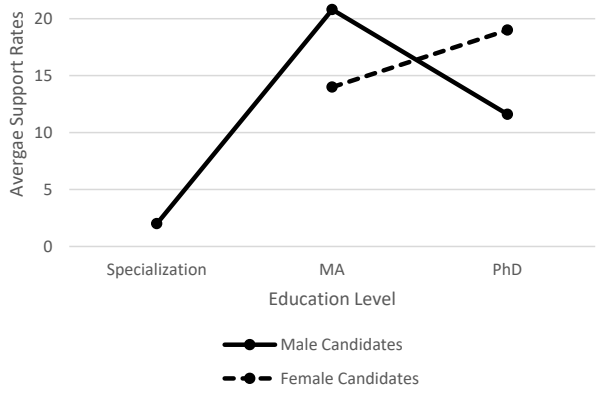
	Academic only	Private only	Public only	Academic +Private	Academic +Private +Public	Total
Male Candidates	27	1	0	7	13	48
Female Candidates	8	0	0	5	3	16
Total	35	1	0	12	16	64

Source: author's own calculations based on empirical data from candidates' currriculum vitaes

Lastly, taking into consideration the highest academic degree and administrative experience by sectors of every candidate (see Tables 2 and 4), average support rates were calculated. The analysis of education levels (see figure 5) revealed how male candidates with a master's degree receive more support than those with specialization or doctoral studies. It seems that men's support rates are higher when advancing from specialization to master's but that the acquisition of a doctoral degree has a negative impact on the number of votes received. On the other hand, female candidates receive more support when they have doctoral degrees, thus, a higher level of education generally seems to have a positive impact in the amount of support received by this group.

Figure 5.

Support rate by academic levels

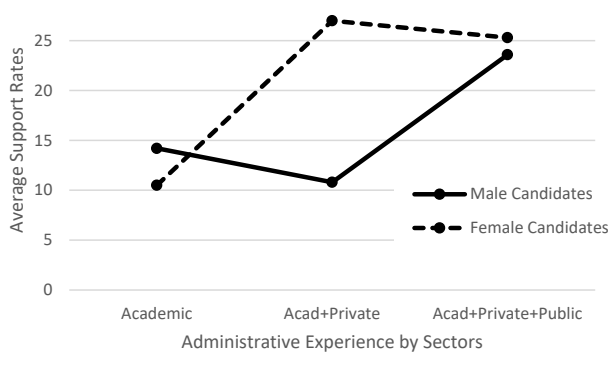


Source: author's schema based on candidates' cvs and organizational records of opinion polls

In relation to sector specific administrative experience, data analysis also illustrates a greater support for male candidates with additional experience in the public sector, but not much benefits from their presence in the private sector. For women, the support rate is more prominent with the accumulation of both private and public sector experience (see Figure 6).

Figure 6.

Support rate by administrative experience



Source: author's schema based on candidates' cvs and organizational records of opinion polls

Conclusions

After a careful analysis of organizational practices for the designation of university rectors, the professional profiles of the candidates and the support rates from the academic community, mixed results were determined. In some cases, theoretical statements for women's scarcity in decision-making roles were partially supported since there is indeed a pattern of low female applications for the executive role of university rector among all Colombian public universities. This finding aligns with stereotype theories where the prospect of competing in a male-dominated group might hold women back from assuming leadership roles (Chen & Houser, 2019) but further qualitative analyses should be conducted to explore people's perceptions and to verify this statement.

Another influential factor could be linked to the difficulties of balancing work-house tasks, which makes higher responsibility roles implausible for women. Likewise, a female disadvantage in terms of administrative experience within the public sector and a standard designation of male figures even in cases where female applicants had similar professional and academic profiles were also identified. These patterns agree with arguments of the congruency theory of prejudice against women regarding hidden prejudices influencing people's perception and consequent resistance towards women's suitability for leadership roles (Eagly & Karau, 2002). It was initially assumed that these arguments could explain women's limited promotion opportunities to executive roles within academic leadership.

However, disproving results are greater within the organizational context of public universities in Colombia. First, by providing evidence of women extended pursue for the highest degrees of academic preparation and their equal performance in terms of administrative experience than that of men applying for the executive role of university rector. Hence, all female candidates' profiles indicate a purposeful investment in their human capital, contrary to the ideas stated in the human capital theory (Becker, 1993). Their recurrent selection of science and STEM related disciplines also imply a level of confidence and ambition that challenges the explanations provided in the literature.

Besides, the evaluation of organizational practices did not identify explicit requirements that would openly exclude or discriminate candidates on a gender-basis. However, the evaluation of professional experience in the case of score evaluation systems and the implementation of opinion polls among all members of the organization were expected to influence biased outcomes because of divergent perceptions of leadership and gender. Indeed, major differences were found in the support levels according to candidates' academic preparation and experience in specific sectors.

Overall, doctoral levels of education seem to have a positive effect for women while men with doctoral degrees seem to receive less support than male candidates with master's degrees. It is important to point out that the

percentage of women candidates with doctoral degrees was quite higher than the percentage of men candidates. Likewise, administrative experience in the private sector benefits the levels of support received by female candidates but for male candidates, working in the public sector generate better outcomes. Still, in general, the organizations' personnel disclose parallel support rates for male and female candidates. Finally, data exhibited the importance of a higher number of women candidates, since all three cases in which women were successfully designated as university rectors were associated to groups of candidates that included more than one woman and belonged to universities that previously had designated female rectors, which ratified the influential power of role models for social learning and behavioral change (Bandura, 1977; Morgenroth, Ryan, & Peters, 2015).

In the end, women who broke the paradigm and ran for the executive role of university successfully overcame the selection stages evaluating their professional background and were generally endorsed by people's votes as shown in the high percentage of shortlisted female candidates, thus, no evidence of gendered promotion processes can be presented. Nonetheless, since very few women passed the last stage where the directive board conducts a final revision and designates the winner, additional studies should be conveyed to determine the potential role of unequal placement of power and opportunity (Acker 1990) within academic organizations. In other words, to explore whether the constitution of the boards, generally composed by a male majority, contribute to the continuance of gender inequality at the organizational level.

In sum, within this particular organizational setting, gender might not influence women's educational progress and occupation choices or people's collective perceptions of congruous leadership profiles (gendered identities). Yet, it does seem to have an indirect effect in women's promotion opportunities due to its impact in sector specific administrative experience and in the final stage of the designation process, in which female candidates are still denied access to executive roles, despite their professional profiles, public support, administrative experience and academic preparation. These results concur with the statements of the glass ceiling effect (Eagly & Carli, 2007a) since all examined cases of female candidates show professional trajectories that prevail over the challenges of the leadership labyrinth (Eagly & Carly, 2007a; Eagly & Carly, 2007b; Gaete-Quezada, 2018) and reinforce a conscious pursue for high-responsibility roles. Further research should be conducted to examine people's reasoning for specific career choices and for the low application rate of female candidates to identify the impact of individual perceptions about gender appropriate jobs and success prospects to aim higher.

Finally, a life-course assessment of candidates' profiles could help us determine whether there are any variations of life-long investment among representatives of both genders to overcome sociocultural barriers and earn a fair opportunity to reach a position at the top of the hierarchy. Overall, the study closely assessed the designation process of academic directive positions and set the current state of organizational practices, collective perceptions, representation rates, and professional profiles of candidates aspiring to the executive role of university rector, all of which have great potential to inform the design and assessment of policies aiming at equal opportunity and anti-discriminatory organizational systems.

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ZSUZSANNA TÓTH – BÁLINT BEDZSULA

TREATING STUDENTS AS PARTNERS – IS IT SO SIMPLE? AN EMPIRICAL INVESTIGATION OF STUDENT PARTNERSHIP IN A BUSINESS EDUCATION CONTEXT

A HALLGATÓK MINT PARTNEREK A FELSŐOKTATÁSBAN – MIT IS JELENT EZ? A HALLGATÓI PARTNERSÉG EMPIRIKUS VIZSGÁLATA AZ ÜZLETI FELSŐOKTATÁSBAN

The challenges assigned by the 'student as partner' movement have redrawn the ways how students and academic staff actively collaborate for the sake of successful teaching and learning. To gain competitive advantage, higher education institutions should understand what student partnership means in their context and decide how to talk about and act upon it. The primary purpose of this paper is to reveal how student partnership is interpreted by our students and lecturers who took part in an online brainstorming session and in an online application of the Q organizing technique to rank the concepts resulting from the previous brainstorming session. The results have been utilized to identify the main similarities and differences between students' and lecturers' interpretations. Neither students, nor lecturers could be treated as homogeneous groups, which also raises challenges to find the right mix of institutional answers to the conceptualization of student partnership.

Keywords: **student partnership, business education, online brainstorming, Q organizing technique, academic staff involvement**

A felsőoktatásban hallgatókat partnerként kezelő mozgalom alapvetően átformálta a hallgatók és az oktatók közötti aktív együttműködések formáit és alkalmazott módszereit a tanítás és tanulás együttes sikere érdekében. Az intézmény által realizálható versenyelőny meghatározó eleme lehet, ha az intézmény tudatosan foglalkozik a hallgatói partnerség intézményi értelmezésével és azzal, hogy milyen erőfeszítésekre van szükség az e téren deklarált intézményi célok megvalósításához. A cikk célja egy ilyen intézményi gyakorlat bemutatása: hallgatóink és oktatóink egy-egy csoportját online ötletrohamra hívtuk a témában, majd a Q-módszertan online alkalmazásának segítségével rendszereztük az így összegyűjtött ötleteket annak felmérésére, hogy milyen hasonlóságok és különbségek azonosíthatók a hallgatók és az oktatók értelmezései között. A kapcsolódó faktoranalízis alapján megállapítottuk, hogy sem a hallgatókat, sem az oktatókat nem lehet homogén csoportként kezelni a hallgatói partnerség értelmezésekor, ami komoly kihívásokat támaszt akkor, amikor az intézmények a hallgatói partnerség kialakításához és fejlesztéséhez kapcsolódó intézményi reakciók megfelelő „vegyületét" szeretnék meghatározni.

Kulcsszavak: **hallgatói partnerség, üzleti felsőoktatás, online ötletroham, Q rendszerező technika, oktatók bevonása**

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Authors/Szerzők:
Dr. ZsuzsannaTóth, associate professor, ELTE Institute of Business Economics, (tothzs@gti.elte.hu)
Bálint Bedzsula, teaching assistant, ELTE Institute of Business Economics, (bedzsula@gti.elte.hu)

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Quality issues in higher education (HE) have been intensively and increasingly addressed in the last two decades as the growing marketization has forced institutions to face many competitive pressures (Bernhard, 2012). This has also given rise to a changing phenomenon, that is, the perception of students as primary customers (Elsharnouby, 2015; Sadeh & Garkaz, 2015) and partners (Healey, Flint, & Harrington, 2014; Taylor & Wilding, 2009). With the spread of the Total Quality Management (TQM) concept, higher education institutions (HEIs) have been increasingly realizing that they are part of the service industry and putting greater emphasis on understanding students' needs and expectations has led to an increasing interest in student engagement and partnership (e.g. Little, 2010), which could be interpreted as an act of resistance to the traditional, hierarchical structure where academic staff has power over students (Matthews, 2017). Furthermore, the rise of service quality issues has also prompted the HE literature to view the perceived quality of HE services provided to students as a point of departure on the pathway towards understanding the drivers of student satisfaction. This trend has resulted in various HE service quality models specifically adapting to the 'pure service' mindset of HE (Oldfield & Baron, 2000) where the quality of personal contact is of utmost importance. Therefore, lecturers who directly deliver and provide the service at the operational level of the institutional hierarchy are of key importance both to the student-customer they serve and the employer, that is, the HEI they represent. The resulting concepts characterizing the new ways of working and learning together, such as co-creating, co-producing, co-learning, co-designing, co-developing, co-researching and co-inquiring, challenge the traditional models of HE relationships (Healey et al., 2014).

The need for enhancing the student as partner (SaP) concept is also underlined by the specific features of HE services, that is, students as customers often need to play an active role in the service provision process (Little & Williams, 2010) and their participation needs guidance and motivation (Kotze & Plessis, 2003). Furthermore, HE services bear special characteristics that also foster building long-term partnership between the service provider (lecturer) and the client (student). What is more, compared to traditional services, the length of the service encounter is usually longer (Hetesi & Kürtösi, 2008) and lasts for months and years, which also enforces putting greater emphasis on the significantly increasing role of students for the sake of successful learning and teaching (Bedzsula & Tóth, 2020).

Taking the service quality perspective, the success of the value co-creation strongly relies on the understanding of each other's roles and needs (Kashif & Ting, 2014). Lecturers have a direct impact on student expectations and perceptions of service quality (e.g. Voss, Gruber, & Szmigin, 2007; Pozo-Munoz, Rebolloso-Pacheco, & Fernandez-Ramirez, 2000), as students perceive HE service quality primarily through their lecturers. Providing lecturers with a facilitating role in establishing partnership could produce fruitful results from several aspects. Lecturers as 'course managers' are closer to the 'point of action' and the quality of interaction between students and lecturers provide prompt and direct feedback to understand the drivers of student expectations and satisfaction, which in turn could also support lecturers in the design and revision of teaching programs (Sander, Stevenson, King, & Coates, 2000, Voss et al., 2007).

Based upon the boost of the HE literature in these aspects, engaging students as partners in learning and teaching has received growing attention in HE in recent years. The relevant literature is also extending at a great pace as both practitioners and theorists are looking for solutions as to how the concept of student partnership could be interpreted and understood effectively. Even though there is a wide range of areas, tools and methods that can be utilized to build and implement partnership, there is no generally accepted institutional pathway or knowledge how it could be developed over time. At the same time, the role of students has also changed with the evolution of a more conscious approach toward the development of institutional mission and vision (Holen, Ashwin, Maassen, & Stensaker, 2020). Therefore, there is a need to identify how available practices can be implemented specifically on institutional level.

Our research is built upon the belief that HE is a service where students are the primary customers and lecturers act in several roles as directly interacting parties, internal customers, and facilitators in the relevant institutional processes. The primary goal is a more conscious understanding of how students and lecturers articulate the concept and drivers of student partnership, which could result in finding the right institutional answers. A former survey served as the background of this specific research, which was disseminated among our students and lecturers in order that a clearer picture of how they think about HE quality could be obtained. The results of this survey were to provide us with inputs for the revision of our institutional quality culture, among which student perceptions drew the attention to the concept of 'students as partners' from a specific perspective. Therefore, we decided to investigate this term more deeply in our institutional context. As a contribution to further research, an online brainstorming and subsequently, the Q organizing technique were applied both with student and lecturer involvement to reveal the differences between the viewpoints of the two directly interacting stakeholder groups and to enable researchers to draw managerial conclusions.

The primary aim of this paper is to discuss how our students and lecturers interpret the concept of 'treating students as partners', primarily in a business education context. Following this train of thought, our paper is structured as follows. Section 2 provides a brief overview of the relevant literature addressing the increasingly up-to-date issue of treating students as partners. Section 3 presents the background of the research including the research purposes and the applied methodology. Section 4 serves as the backbone by introducing the results of the qualitative methodology, while Section 5 sums up the most important managerial conclusions and further research directions.

Literature review

According to the traditional approach embedded historically in the operation of the HE system and its institutions, the role of academics as the creators and transmitters of knowledge is traditionally viewed as an ivory tower, while students are the passive receivers of knowledge. The student-staff partnership movement promotes the interacting parties to take up new roles (Cook-Sather, 2001) and supports bi-directional relationships by placing students and staff into the position of co-creators and co-learners of knowledge (Cook-Sather, Bovill, & Felten, 2014) and by diminishing the decisive role and power of lecturers. Matthews (2017) uses the 'Students as Partners' (SaP) phrase to challenge the traditional assumptions. In this transformation process there are no 'step-by-step instructions'. Rather it is based on the creativity of the people involved in translating the principles of SaP into practice. 'All SaP projects will look different and involve different actors' (Bovill, 2017).

The relevance of the topic is confirmed by the number of papers dealing with this issue (see e.g. the systematic literature review of Mercer-Mapstone et al., 2017), concluding that lecturers growingly accept that treating students as partners is of utmost importance. In the new era of HE facing many competitive pressures, the ways that students and academic staff collaborate for the sake of successful teaching and learning need to be rethought (Mercer-Mapstone et al., 2017; Healey et al., 2014; Flint, 2016).

What do we mean by treating students as partners? According to Cook-Sather et al. (2014, pp. 6-7) partnership is a 'reciprocal process through which all participants have the opportunity to contribute equally, although not necessarily in the same ways, to curricular or pedagogical conceptualization, decision-making, implementation, investigation, or analysis'. Healey et al. (2014, p. 12) describe partnership as 'a relationship in which all involved – students, academics, professional service staff, senior managers, students' unions, and so on – are actively engaged in and stand to gain from the process of learning and working together.' Partnership may happen within or outside the curricula, between individuals, small groups, in courses or even in entire programs of study (Mercer-Mapstone et al., 2017). The outcomes are beneficial for both parties, e.g. it results in positive learning impacts (Cook-Sather et al., 2014), an increased sense of responsibility for, and motivation around the learning process for students and increased engagement from academic staff (Bovill, Cook-Sather, Felten, Millard, & Moore-Cherry, 2016; Werder, Thibou, & Kaufer, 2012).

Matthews (2016) distinguishes student engagement and student partnership since the former concept emphasizes what students do at a university, while the latter one is focused on the collaboration of students and staff. Therefore, the significance of partnership is in the process. The model proposed by Healey et al. (2014) also represents the idea that partnership belongs to the broader concept of student engagement and distinguishes four overlapping areas in which students can be partners in learning and teaching, from some of which (e.g. curriculum design) students have traditionally been excluded. The four overlapping areas are (1) learning, teaching and assessment, (2) subject-based research and inquiry, (3) curriculum design and pedagogic consultancy, (4) scholarship of teaching and learning (SoTL). Engaging students actively in their learning is the most common form of partnership used by many HEIs recognizing the growing importance of peer-learning and peer- and self-assessment (Healey et al., 2014). Students engaged in subject-based research can gain experience through co-inquiry. Students are also usually the objects of SoTL research, while curriculum design and pedagogic consultancy is the area where student engagement through partnership is least well developed. Consequently, there are few strategic institutional initiatives that can be mentioned as an example. Bovill et al. (2016) discuss the challenges arising with the treatment of students as partners, grouping them into three categories. First, the traditional assumptions of HE often make it difficult for both students and the academic staff to take on new roles and perspectives. Second, institutional structures, practices and norms generally serve as practical barriers for the successful collaboration. Third, an inclusive and proactive approach is required to involve already marginalized students and staff in this partnership building and strengthening process. Besides the positive outcomes, Mercer-Mapstone et al. (2017) also list the negative outcomes of partnership, which could make it difficult, impossible and in some cases even undesirable to involve all students, e.g. when work is within tight time constraints, lecturers have limited contact with students, professional bodies frame what is possible, the sizes of classes are large, students are resistant, student and staff are sceptic about partnership and the benefits of involvement (Bovill, 2017; Bovill et al., 2016, Cook-Sather et al., 2014).

Despite the extensive research efforts in this field, neither the language, nor the level of partnership has been explicit in the literature (e.g. Gardebo & Wiggberg, 2012). Students may be engaged through partnership in various ways including institutional governance, quality assurance, research strategies, community engagement, and extra-curricular activities (Healey et al., 2014). Partnership approaches that have been successful in small classes may not work in large-scale settings. Könings, Bovill, & Woolner (2017) propose a matrix to clarify the roles of students and other stakeholders at different stages in projects dealing with the establishment of student partnership.

What about lecturers? Mihans, Richard, Long, & Felten (2008, p. 9) claim that lecturers often do not pay sufficient attention to the most valuable resources in the classroom, namely, to their students. The academic staff should not only consult students but also explore ways to involve them in the design of teaching approaches, courses, and curricula (Bovill, Cook-Sather, & Felten, 2011). Viewing students as peers providing valuable perspectives is a key to supporting collegial partnerships between faculty members and students with the aim of improving classroom experience (Cook-Sather, 2011; Cook-Sather & Motz-Storey, 2016). Dibb & Simkin (2004) highlight that

the university staff should acquire a new role as facilitators rather than providers. Pedagogic approaches that foster partnership lead to supportive learning relationships and employability benefits for students through the development of generic and subject-specific skills and attributes (Crawford, Horsley, Hagyard, & Derricot, 2015; Pauli, Raymond-Barker, & Worrell, 2016).

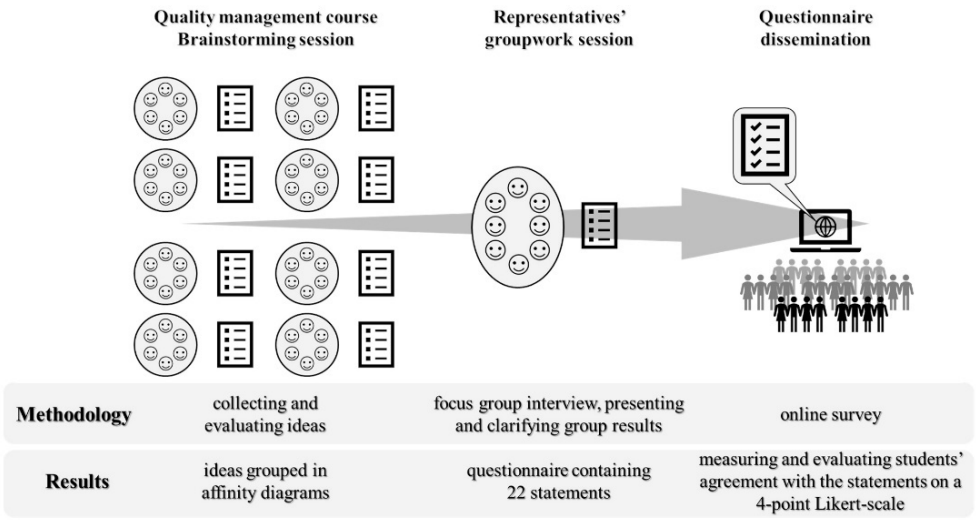
Understanding how actions and initiatives of partnership impact upon institutional cultures and how the concept of students as partners is conceptualized by institutional management is an important aspect (Gravett, Kinchin, & Winstone, 2019). Owing to the strategic importance of this concept, it is to be ensured that the values of the applied approaches under the umbrella of student partnership fit with the values of students and staff working within projects aiming at developing partnership.

education and how they participate in the education process (Petruzellis, d'Uggento, & Romanazzi, 2006; Tóth & Bedzsula, 2019).

Based upon the main trends demonstrated in the literature review, there are many levels of participation that could be viable in the institutional operation. In our research conducted at a Hungarian HEI, the focus is on engaging students as partners in learning and teaching (based upon the model proposed by Healey et al., 2014) as the first step HEIs take when climbing up the 'ladder of partnership' to emphasize a lecturer-based approach at course level. We wish to go beyond the simple listening to the voice of students by engaging students as co-learners, co-researchers, co-developers, and co-drivers in our courses, but the first step is to reveal how students and lecturers interpret the SaP concept.

Figure 1.

Process of survey development and dissemination



Source: own compilation

The primary role of students as customers in the HE context has become obvious in the Hungarian higher education system as well (Rekettye, 2000; Bedzsula & Tanács, 2019; Szabó & Surman, 2020; Berács, Derényi, Kádár-Csoboth, Kováts, Polónyi, & Temesi, 2016, Berényi & Deutsch, 2018; Bedzsula & Topár, 2014; 2017; Heidrich, 2010); so students are being paid growing attention, as institutions are required to provide a quality environment and education for their students. With the purpose of enhancing operation in HE and considering that students are growingly conscious about the services they receive, student expectations and satisfaction are dedicated a greater role in the improvement of HE processes. The attitude of the new generation of students provides a wealth of new opportunities; they expect to be treated as partners and are eager to play an active role in facilitating the HE issues that are important for them. They increasingly regard themselves as customers; they have become more selective and interactive in their choices with respect to their

Research background and research purposes

In the academic years of 2017/2018 and 2018/2019 some research was conducted in order to identify critical to quality attributes of core educational services, since the need had emerged in our institution, following a 'bottom-up' approach, to better understand the concept of teaching quality by involving the students in the classroom application of various quality management tools. The main motivation serving as the background of our research was the changing role of students and lecturers in the inseparable teaching and learning processes. The new generation of students increasingly regard themselves as customers; consequently, they have become more aware of how they are taught and how they participate in the learning process (see e.g. Voss & Gruber, 2006; Senior, Moores, & Burgess., 2017).

Figure 1 gives a brief overview of the process of our research. Students of quality management courses were invited to participate in a brainstorming session to collect

Figure 2.

The statements formulated by students

	STATEMENTS	strongly disagree	rarely disagree	rarely agree	strongly agree
S01	Student feedback has to be taken into account in the development and changes of higher education.	o	o	o	o
S02	Course contents that enable students to get a job has to be prioritized in the development of the curriculum, the course materials and the lectures.	o	o	o	o
S03	In the development of the curriculum, the course materials and the lectures, the focus has to be on relevant and up-to-date knowledge transfer.	o	o	o	o
S04	Practice has to be more dominant in education than theory.	o	o	o	o
S05	The opinions of the alumni, who are already in employment, have to be taken into account in the development of the curriculum and course materials.	o	o	o	o
S06	The main purpose of the course is to provide a general knowledge of areas instead of discussing certain topics in detail.	o	o	o	o
S07	It is the lecturer's responsibility to inspire and motivate student to learn.	o	o	o	o
S08	Course and group sizes have to be reduced as much as possible, and the personal relationships between lecturers and students have to be strengthened.	o	o	o	o
S09	Lectures need to be entertaining, and should include interactive elements to help students stay focused.	o	o	o	o
S10	The purpose of lectures is to discuss the course material in more detail than in the available notes provided in the course in a more concise, to the point manner.	o	o	o	o
S11	In the case of a university course students can rightly be expected to prepare for the classes individually previously at home.	o	o	o	o
S12	Course requirements (e.g. regarding the curriculum and the subject) have to be clear and implemented consistently during the course.	o	o	o	o
S13	Course requirements (e.g. regarding the curriculum and the subject) and regulations have to be the same for everyone, individual treatment is not acceptable.	o	o	o	o
S14	More step-by-step assignments during the course of the semester should be provided for students to fulfil a course instead of taking an exam at the end of the semester.	o	o	o	o
S15	A greater emphasis should be put on group work and project work for students during the semester.	o	o	o	o
S16	Lecturers should consider other factors besides learning outcomes when evaluating a student.	o	o	o	o
S17	Lecturers should give prompt, objective feedback to their students in every case.	o	o	o	o
S18	Assessments should test the students' ability to apply in practice what they have learned, rather than assessing their knowledge of theory.	o	o	o	o
S19	Student assessment conditions have to be just and fair, cheating has to be prevented.	o	o	o	o
S20	Every course should aim at minimizing the number of unsuccessful completions.	o	o	o	o
S21	Educational resources need to support the all-round understanding of the course even without students attending the lectures.	o	o	o	o
S22	Educational resources (slides, notes, web content, software...) are required to be up-to-date and the methods applied need to be as modern as possible.	o	o	o	o
S23	Students should be treated as partners and adults in the context of higher education services, the communication has to be bidirectional.	o	o	o	o

Source: own compilation

those attributes that had an impact on the perceived educational service quality. The compiled list of characteristics resulting in 23 statements (see Figure 2) was utilized as a 4-point Likert scale-based questionnaire. With around 360 responses, statistical analyses were executed, investigating whether there were any differences between the quality attributes perceived by the different segments of students and to evaluate the influence of factors, such as age, level of study, programme and grade point average in understanding student expectations. The results allow us to revise the relevant institutional processes to be able to adapt to our students' needs and at the same time to establish a framework that allows the continuous monitoring of students' needs and expectations. The results also enable us to identify critical to quality attributes which may be utilized in all platforms and interactions with students. In addition, institutionalizing this approach may contribute to the reshape of the organizational quality culture with an emphasis on student focus.

Table 1.

Response rates in the research aiming at the identification of students' expectations related to teaching quality.

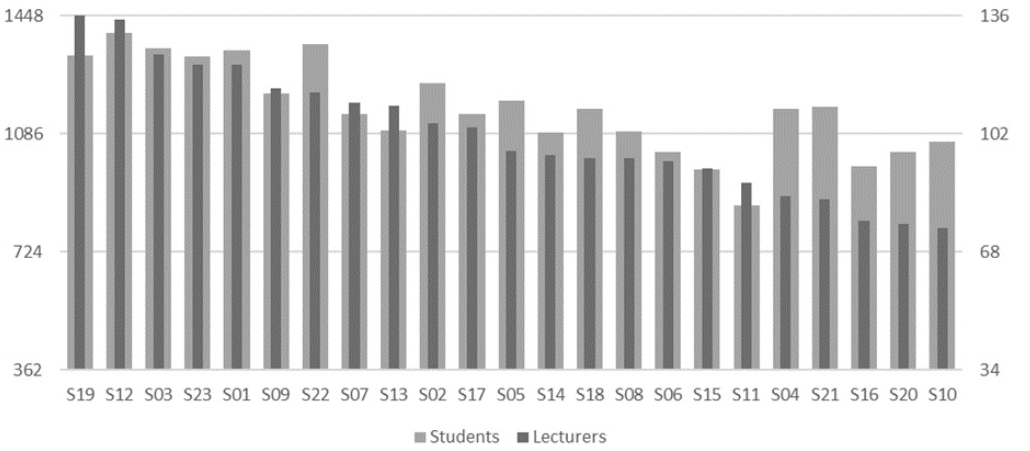
Level	Number of filled questionnaires	Number of questionnaires	Response rate
BSc/BA (full-time programs)	194	636	30.5%
MSc/MA (full-time programs)	61	173	36.4%
MBA (part-time program)	107	277	38.6%
Total	**362**	**1086**	**33.3%**

Source: own compilation

Students of different business courses invited to fulfil the questionnaire indicated the degree to which they agreed with the closed-ended questions on a 4-point Likert-scale, where 1 indicated the lowest level of agreement (agree the least) and 4 the highest level of agreement (agree the most). At the end of the questionnaire, more information was gathered including the level of study, financing form, grade point average and age. The hyperlink pointing to the electronic questionnaire was sent to the students via

Figure 3.

Graphical interpretation of the aggregate scores given separately by lecturers and students



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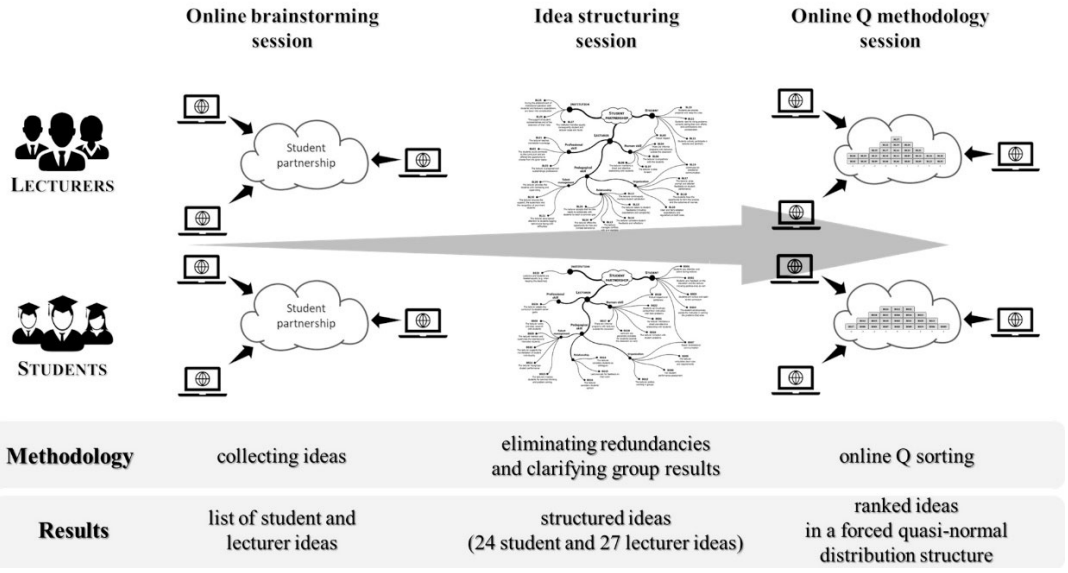
e-mail. They had one week to fill out the survey. An arbitrary sampling method was applied; bachelor and master level students who had already taken our quality management course were invited to fill out the online questionnaire anonymously (see Table I). At the same time a group of lecturers was also involved in filling the same questionnaire to contrast the viewpoints of the two directly interacting stakeholder groups in the core educational process.

for the classes individually at home. This conclusion puts S23 in a different light, since according to our results, students interpret 'partnership' differently from the way lecturers would define this term. Therefore, we became very curious to understand how our students and lecturers define the partnership role of students in higher education and what kind of concepts come to their mind associated with the term 'student partnership'.

Figure 4.

Process of investigating 'partnership'



Methodology	collecting ideas	eliminating redundancies and clarifying group results	online Q sorting
Results	list of student and lecturer ideas	structured ideas (24 student and 27 lecturer ideas)	ranked ideas in a forced quasi-normal distribution structure

Source: own compilation

Altogether 36 lecturers were invited, from whom 34 filled in the form, which resulted in a response rate of 94.4%.

Figure 3 illustrates lecturer aggregate scores (dark grey columns) with reflection to students' aggregate scores (light grey columns).

Kruskal Wallis and Mann-Whitney U tests with a significance level of 0.05 were conducted on the responses as judgements gained both from students and lecturers. Here we would like to highlight the presence of S23 on the 'top 5 list' of the statements with which both students and lecturers agreed the most. This means that the two directly interacting parties confirmed that students should be treated as partners. Besides S8 and S15, S23 was the statement in the case of which all null hypotheses were accepted; that is, no significant differences were found between the distribution of responses based upon the different segmentations of students and between the distribution of responses of students and that of lecturers. This carries the message that independently of age, level of study, grade point average, being a student or an academic, our respondents strongly agreed with the 'student as partner' approach.

The conducted statistical analyses revealed some interesting issues, which can be detected in Figure 3 as well. S11 was scored differently by students. This means that students seem to be somehow neutral with the statement claiming that students may be required to prepare

Methodology and results

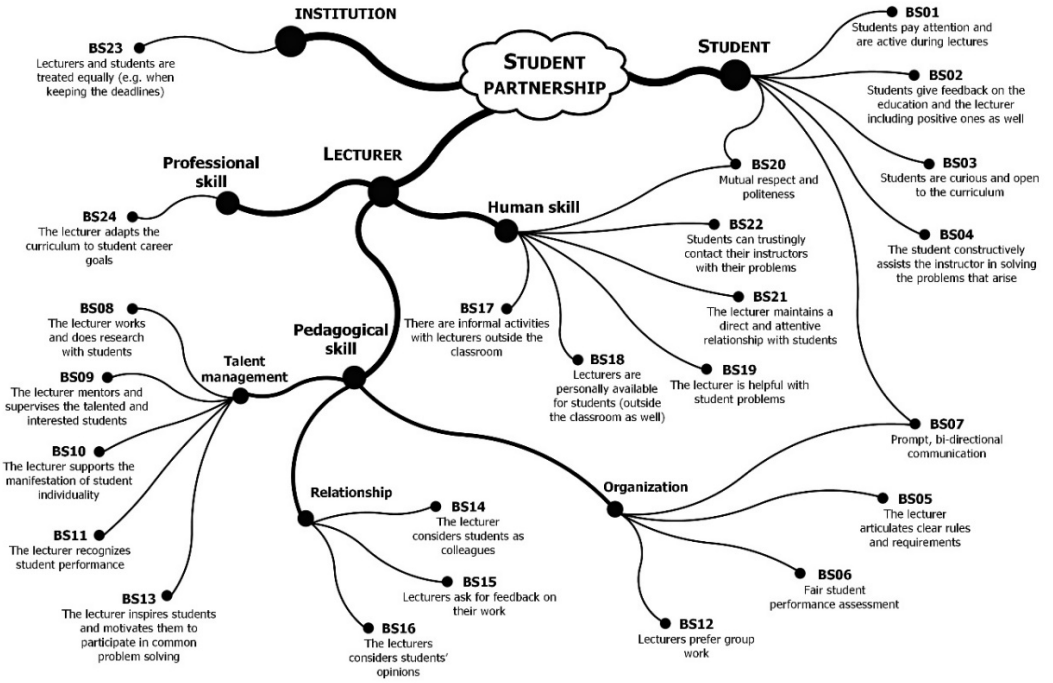
Next, the research was continued by an online brainstorming session involving both students and lecturers, each group separately. The brainstorming question was *What terms come to your mind when you define the 'students as partners' concept?*

10 students (5 BA and 5 MA level students) and 10 lecturers were invited separately to an online platform where the collection of ideas took place and was open for 48 hours so that each participant could find the most convenient that could be spent on this contribution. Students listed 48 ideas; however, lecturers were more active by providing 81 elements. With the redundancies eliminated and the collected ideas clarified in both groups,–students and lecturers involved in the previous brainstorming session were invited again to take part in a Q organizing method in order that the concepts resulting from the brainstorming ideas could be prioritized with the employment of a factor analytic procedure (see Figure 4).

Figure 5 demonstrates the grouped ideas of students (altogether 24 items), while Figure 6 depicts those of lecturers (altogether 27 items). Figure 5 and Figure 6 also denote the abbreviations that are going to be used coherently in the rest of the paper: 'B' stands for brainstorming, 'S' for students, 'L' for lecturers, and the ideas are numbered for the sake of distinctness (expressing a nominal scale).

Figure 5.

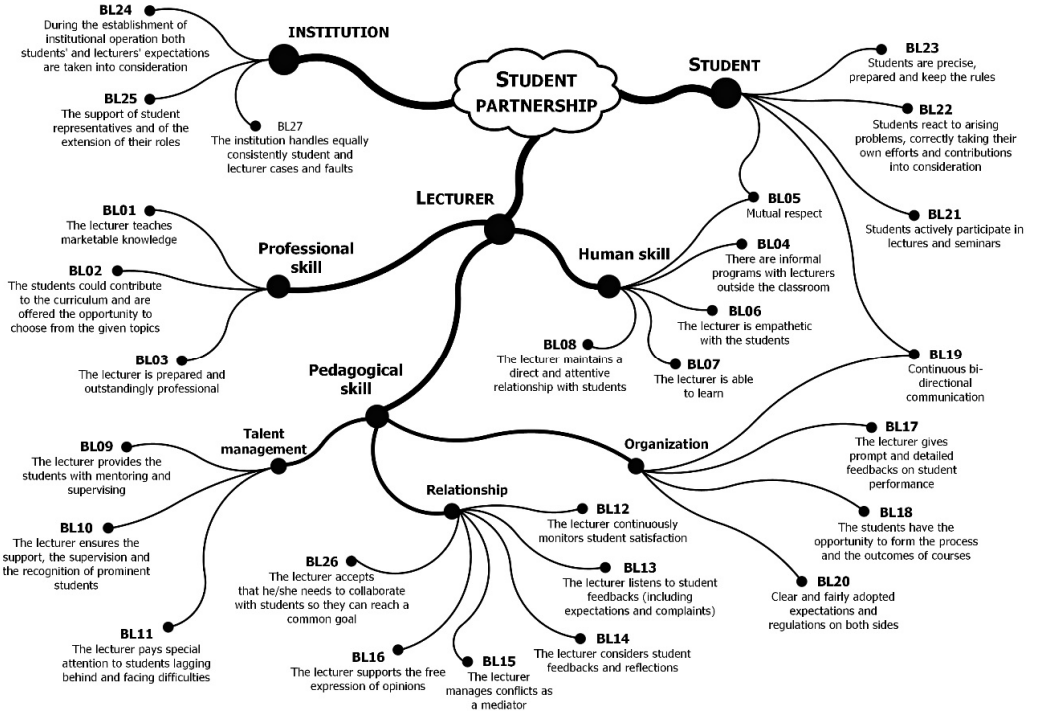
Structured ideas of student brainstorming



Source: own compilation

Figure 6.

Structured ideas of lecturer brainstorming



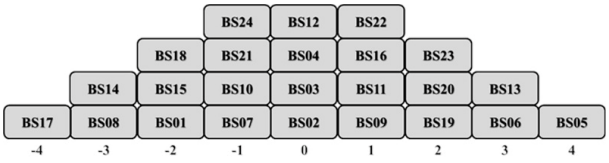
Source: own compilation

Both figures represent the categorization of ideas according to the main contributors in the service provision process, namely, institution, student, and lecturer. Furthermore, the ideas associated with the lecturer are grouped into human, pedagogical and professional skills. It is eye-catching in both figures that both interested parties significantly consider the role of lecturers in the service provision process on course level for the sake of successful learning and teaching. Even though the ideas were collected separately, many similar phrases can be caught when the brainstorming results are compared, e.g. mutual respect and politeness, bi-directional communication, informal activities outside the classroom.

To come to an interpretable conclusion and to be able to draw managerial conclusions, we invited 21 students and 23 lecturers to take part in an online Q organizing method applied as an exploratory technique. The Q methodology was originally established via a simple adaptation of the quantitative technique of factor analysis with the extension that in this case the 'variables' are the various persons who take part in the study (Stephenson, 1936). Therefore, with the utilization of the Q methodology our aim was to gain a better knowledge of the brainstorming ideas, prioritize them and compare these results with our empirical ones gained from the previous survey (based upon the statistical analyses of statements demonstrated in Figure 2). The factor analysis provided on this basis also allowed us to reveal a group of determinative opinions both from the students' and the lecturers' perspectives.

Figure 7.

Aggregate result of the Q organizing technique with student participation ('B' stands for brainstorming, 'S' stands for student, while numbers indicate a specific brainstorming idea relating to Figure 5)



Source: own compilation

The Q procedure involves a sample of items, namely, brainstorming ideas scaled along a standardized ranking distribution by a group of participants. They are to do this according to their own likes and dislikes and hence as a function of the personal value they assigned to each item. The primary aim of the Q methodology is to ask participants to decide what is meaningful and hence what has value and significance from their perspective (Watts & Stenner, 2005).

The clarified brainstorming ideas served as a so-called Q set, offering a general overview of the relevant viewpoints on the subject. Participants were asked to assign each item a ranking position in a fixed quasi-normal distribution (for the organization of ideas see Figure 7 and 8 as examples). In our case a 9-point scale was employed, possible ranking values ranging from +4 for items respondents agree the most with and to -4 for items that participants agree the least with. In expressing their individual perceptions via the Q sorting procedure, a participant is required to allocate all the Q set items, namely clarified brainstorming ideas to an appropriate ranking position in the distribution provided. By summarizing the rankings of all participants, the Q methodology aims to reveal some of the main viewpoints that are favoured by a particular group of participants, namely, students and lecturers.

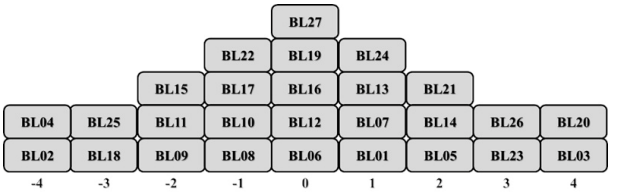
Figure 7 demonstrates the aggregate ranking of students by indicating that they agree the least with the idea *There are informal activities with lecturers outside the classroom* (BS17, total score: -70). They also tend to agree the least with the following ideas of the Q set: *The lecturer works and does research together with students* (BS08, total score: -46), *The lecturer considers students as colleagues* (BS14, total score: -31) and *The student pays attention and actively participates in lectures* (total score: -24).

The most agreeable idea when discussing treating students as partners is *The lecturer articulates clear rules and requirements* (BS05, total score: +57). Students tend to agree strongly with the following: *The lecturer inspires students and motivates them to participate in common problem solving* (BS13, total score: +42), *Fair assessment of student performance* (BS06, total score: +38), *Lecturers and students are treated equally* (e.g. when keeping the deadlines) (BS23, total score: +33), *Mutual respect and politeness* (BS20, total score: +33), while ideas of the Q set, such as *The lecturer prefers working in groups* (BS12, total score: -6), *The student constructively assists the instructor in solving the problems that arise* (BS04, total score: +1), S*tudents are curious and open-minded to the curriculum* (BS03, total score: -2),*Students give feedback on the education and the lecturer including positive ones as well* (BS02, total score: -7) are in the neutral zone.

If we compare the ranking originating from the Q methodology with our previous empirical results, the following conclusions can be drawn. Taking the results demonstrated by Figure 3 (see the light grey columns reflecting student aggregate scores), S12 embodies the statement that was given the highest aggregate score by students. The Q organizing methodology also confirms the issue addressed by this statement, namely, the importance of articulating clear requirements and rules by the instructor. The same opinion appears as in BS05. Although students rated S23 (*Treating students as partners*) high, they seem to agree the least with the ideas titled as *The lecturer considers students as colleagues* (BS14) and *The student pays attention and actively participates in lectures* (BS08). The latter one is also in accordance with the empirical results belonging to S11, which was given the lowest total score when measuring agreement with this issue in the first part of the empirical analysis. S19 was in the top five statements (see again Figure 3), emphasizing fair conditions when assessing student performance. This issue was also highlighted in the Q methodology as BS06 was one of the most agreeable ideas.

Figure 8.

Aggregate result of the Q organizing technique with lecturer participation (B' stands for brainstorming, 'L' stands for lecturer, while numbers indicate a specific brainstorming idea relating to Figure 6)



Source: own compilation

Figure 8 implies the aggregate results originating from the Q methodology when lecturers participated. The ideas they most agree with are the following: *Clear and fairly adopted expectations and regulations on both sides* (BL20, total score: +53), *The lecturer is prepared and outstandingly professional* (BL03, total score: +41), *The lecturer accepts that he /she needs to collaborate with students to reach a common goal* (BL26, total score: +37), *Students are precise, prepared and keep the rules* (BL23, total score: +33). Comparing students' and lecturers' results (Figure 7), BL20 can be viewed as an equivalent of BS05, both putting clear rules and expectations into the forefront, considered as the most agreeable idea both by students and lecturers.

If we take a look at the other tail of the forced normal distribution, we can conclude that lecturers agree the least with the following: *There are informal activities with lecturers outside the classroom* (BL04, total score: -63), *The students could contribute to the curriculum and are offered the opportunity to choose from the given topics* (BL02, total score: -53), *The students have the opportunity to form the process and the outcomes of courses* (BL18; total score: -43) and *The support of student representatives and of the extension of their roles* (BL18, total score: -32). Similarly, BL04 is equivalent with BS17, that is, neither lecturers nor students agree with the idea embodying partnership as having informal activities together outside the classroom.

What is interesting when comparing the content of Figure 7 and Figure 8 is the fact that the idea articulating students' active participation during lectures (see BS01 in Figure 7 and BL21 in Figure 8) is situated on the opposite sides of the two distributions. However, students tend to agree with the idea stating that lecturers should inspire them to participate in mutual problem solving (BS13 in Figure 7).

Should we compare lecturer results given in Figure 8 with the results of the previous empirical investigation illustrated in Figure 3 (also based on lecturer responses reflected by dark grey columns), the following patterns can be exemplified. The total score of S12 (see Figure 7) is confirmed by the results of the Q organizing technique, as one of the most agreeable ideas was BL20, highlighting the importance of clear requirements and rules for both groups of participants directly interacting in the service provision process. This is also in line with S19, articulating fair circumstances for student performance assessment. BL03 (*The lecturer is prepared and outstandingly professional*) also strengthens the result belonging to S02 (*Contents that enable student to be successful in the labour market*) by focusing on the professionalism and up-to-datedness of the lecturer. S23 (*Treating students as partners*) was in the top 5 statements (see in Figure 3), which tends to be reflective to BL14, BL23 and BL26, embodying ideas that emphasize the contribution of both parties in successful learning and teaching. S01 was also given a high total score previously. This statement is reflected as an agreeable idea titled as BL14, focusing on the lecturer's role in the consideration of student feedbacks and opinions.

The other tail of the distribution conveys the message that BL02 and BL18 are the ideas that lecturers agree the least with; therefore, it puts the consideration of 'treating students as partners' in a different light. Students also seem to agree the least with the idea of being treated as colleagues (BS14 in Figure 7). What is even more surprising, the ideas that consider the contribution of students on course level belong to the least agreeable ideas, see BS01 (*Students pay attention and are active during lectures*) and BS14 (*Students are treated as colleagues*) in Figure 7. With respect to the lecturer results, the lecturers agree the least with involving students in the formulation of the curriculum and in the schedule planning of the semester. The fact that lecturers put BL02 and BL18 on the left tail of the distribution suggests that they do not want to be deprived of their course managerial role**.** This is somehow confirmed by students' results as well; that is, it is the lecturer who is the main catalyst of building partnership.

Table II.

Rankings assigned to each idea within each of the student and lecturer factor exemplifying Q sort configurations

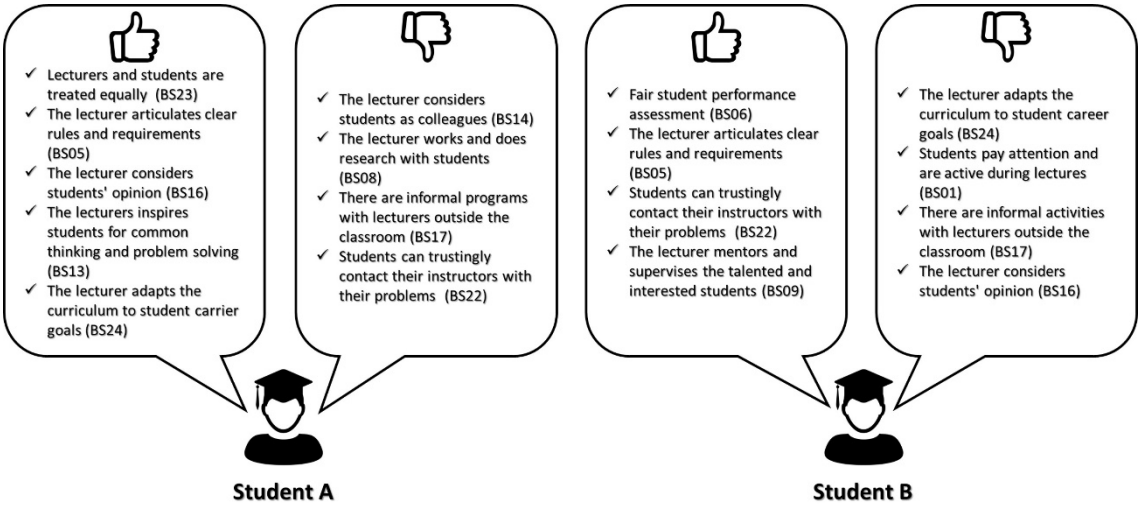
	Students	
	A	B
BS01	1	-3
BS02	0	-1
BS03	1	0
BS04	0	1
BS05	3	3
BS06	0	4
BS07	-2	1
BS08	-3	-2
BS09	-1	2
BS10	-1	-1
BS11	2	0
BS12	0	-1
BS13	2	1
BS14	-4	0
BS15	-1	-2
BS16	3	-2
BS17	-3	-3
BS18	-2	1
BS19	1	2
BS20	1	2
BS21	-1	0
BS22	-2	3
BS23	4	-1
BS24	2	-4

	Lecturers		
	C	D	E
BL01	4	-3	-1
BL02	-3	-4	-2
BL03	4	-1	2
BL04	-4	0	-3
BL05	3	1	0
BL06	-1	-1	4
BL07	1	-2	2
BL08	-4	1	0
BL09	2	-2	-3
BL10	2	-3	-2
BL11	-2	-1	0
BL12	0	2	-4
BL13	3	1	-1
BL14	0	2	3
BL15	-2	0	0
BL16	-1	2	1
BL17	0	-2	0
BL18	-3	-4	1
BL19	-1	0	1
BL20	1	3	3
BL21	1	3	-1
BL22	0	1	-2
BL23	1	4	1
BL24	-2	-1	4
BL25	-1	0	-4
BL26	2	4	-1
BL27	0	0	2

Source: own compilation

Figure 9.

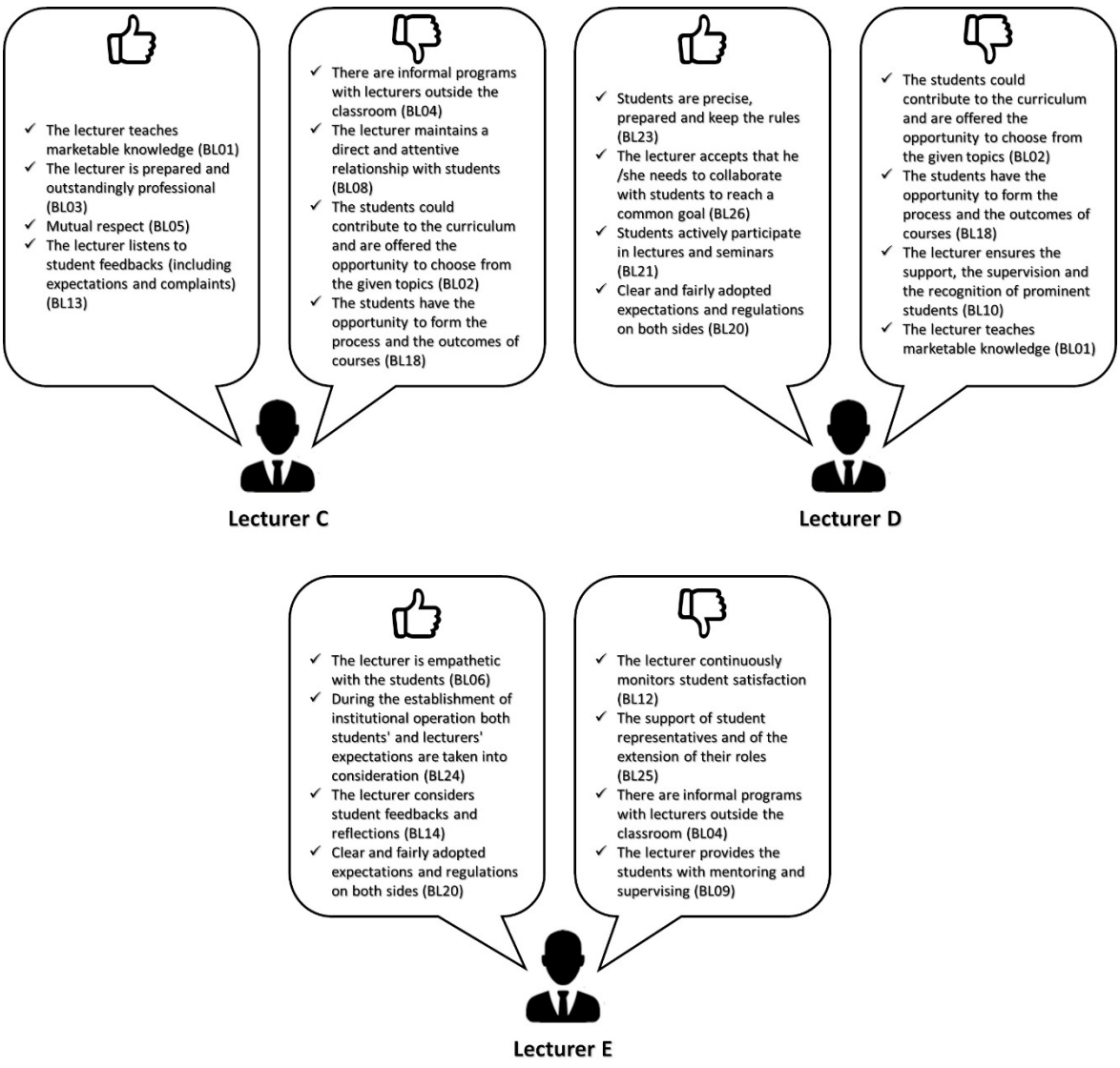
Differences between Factor Student_A and Factor Student_B related to student partnership



Source: own compilation

Figure 10.

Differences between Factor Lecturer_C, Lecturer_D and Lecturer_E related to student partnership



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The Q methodology could apply a by-person correlation and factor analytic procedure as well. The result is a set of factors onto which the participants load based on the item configurations they have created. This means that two participants that load onto the same factor have created very similar item configurations. Each factor captures a different item configuration which is shared by the participants that load onto the same factor (Watts & Stenner, 2005). The factor analysis carried out with varimax rotation resulted in Table II (all factors' eigenvalues exceed 1.00, total variance explained is 63% in the case of students and 60% in the case of lecturers). Reading these tables by column reveals the configuration or comparative ranking of items, which characterizes a particular factor. Reading the table by row reveals the comparative ranking of a particular item across all the factors (Watts & Stenner, 2005).

The two-factor structure resulting from the Q methodology with student involvement allows us to draw the following conclusions (Table II). Factor Student_A considers himself/herself as the direct customer of HE services and studying in HE is considered as an investment in his/her own future. Factor Student_B believes more in the traditional hierarchical structure. Figure 9 sums up the main features and highlights the inhomogeneity of students as well. There are three statements which are interpreted differently: *Students can trustingly contact their instructors with their problems* (BS22), *The lecturer considers students as colleagues* (BS14) *The lecturer adapts the curriculum to student career goals* (BS24).

The factor analysis carried out on lecturer inputs resulted in a three-factor structure. Factor Lecturer_C strongly feels that a lecturer should be outstandingly professional, transmitting the nuts and bolts of the given professional field. This group also seems to believe that it is important to listen to the voice of students. Factor Lecturer_D emphasizes the active participation of students to reach the common goals of the non-separable teaching and learning process during the lectures. Factor Lecturer_D also needs a well-structured framework for operation that categorizes the responsibilities of both parties. Factor Lecturer_E feels that students have their own rights and responsibilities, and equal and fair treatment is based on clear rules. This aim is also supported in the improvement process of institutional operation. Figure 10 illustrates the main features and underlines the inhomogeneity of lecturer attitudes as well.

Discussion and conclusion

Treating students as partners is given a rapidly growing interest in HE since the new generation of students, who increasingly regard themselves as customers, have become more selective and interactive in their education choices (Petruzellis et al., 2006). The many institutional examples of building partnership available in the literature provide evidence for crossing the boundaries between traditional student and staff roles and for inspiring both parties to contribute as co-learners, colleagues and co-inquiries, which is challenging for the existing identities and practices (Healey et al., 2014). As a result, the academic staff should acquire a new role as facilitators rather than providers (Dibb & Simkin, 2004).

As 'treating students as partners' has become a rising concept in the literature, we decided to reveal its understanding in our institutional context by listening to the voice of our students and lecturers. Therefore, an online brainstorming and Q sorting session took place that outlined the distinctive features through which this term could be characterized in separate groups of students and lecturers. Based on this, different student and lecturer attitudes took shape. What a common feature is the emphasis on the responsibility of the lecturer, although there are remarkable differences what lecturers should do in order to end up in a mutually successful outcome.

The results of the Q methodology highlight some important conclusions. Students express quite strong restraint with the following statements: *There are informal activities with lecturers outside the classroom*; *The lecturer works and does research together with students*; *The student pays attention and actively participates during lectures*. These opposing opinions clearly suggest that students' motivation to study and work hard may be lower than expected, which is a strong obstacle to building partnership. Based on these results, an important aim could be the increase in our students' engagement; therefore, the institution should contribute to their learning success and their preparedness for the increasing requirements of the labour market. Generation Z requires new pedagogical and educational methodologies as well as the review of the supporting processes including e.g. communication or study affairs in the case of which institutional awareness should be raised.

The factor analytic procedure also brings some remarkable conclusions. From the two groups of students, one seems to expect a professional service provision by paying attention to the tangibles (rules and requirements stated on course level) and to their future career, whereas the other group believes more in the traditional way. The picture seems to be more shaded in the case of lecturers, that is, one group of lecturers considers their responsibility in their professionalism, another group of lecturers expects conscious student participation in the classroom, but feels comfortable when he / she is in a superordinate position. The third group of lecturers relies on the institutional background, which exactly states students' and lecturers' roles in this process. The results clearly suggest that neither the students, nor the lecturers could be treated as a homogeneous group, since different attitudes could be outlined in the case of both parties, which makes the situation even more complex.

To serve strategic purposes, the following conclusions needing further investigation could be drawn for institutional management. There are several specific issues in the case of which students and lecturers think the same way. However, some important differences can be detected between students' and lecturers' viewpoints, which may have an impact on the successful collaboration of the two

parties in the classroom and when it comes to the establishment and implementation of institutional regulations and rules. These issues also address several questions associated with the organizational culture, since the means of understanding the drivers of student partnership are strongly influenced by the institutional quality culture. This internal culture could be viewed as a continuous improvement mechanism that acts at both institutional level and at individual/staff level. This mechanism requires both strong visionary and strategic leadership at the top of the institute and requires the bottom-up cooperation of the different stakeholders (Gvaramadze, 2008). The enhancement process at institutional level cannot be fruitful without any efforts on individual / staff level and vice versa. Therefore, it could be built on a bottom-up approach, which develops academic community through values, attitudes, and behaviours within an institution. This places the student as the central figure and requires complementing value-added measures of enhancement with empowerment mechanisms by giving power to participants to influence their transformation.

Our empirical results also imply that both the lecturers and the institution should take on a proactive role when establishing partnership. Proactive, strong communication and operation is needed to manage the improvement and change in this context. This situation means that students and lecturers need to collaborate, treating each other as partners. Even though they are interdependent, they are not in an equal position at this moment, so we need to answer the question of how we can manage student partnership and what the required role of instructors is. A viable way could be to ask the students at the beginning of each term to get acquainted with their expectations with respect to a given course. These expectations may cover not only the course content, but also the management of the course. This allows the lecturer to review the learning objectives of the course at the beginning of the semester and conclude how these goals are met at the end of the semester. Therefore, the exploration of expectations requires the methodological training of instructors via a manual that can guide instructor efforts. By these means, they can exert some control by correctly informing students about a course. This can also result in encouraging students to have accurate expectations, which could increase partnership.

Our results also highlight that students cannot be transformed from passive to active customers by magic from one day to the next; that is, institutions should take the first steps, since it is highlighted by our research that students need to be prepared for that role by being fostered in their 'metamorphosis'. The most recent set up of the institutional committee for quality affairs and the involvement of student representatives in the committee's work declares the clear engagement of institutional management to involve students in the discussion of student partnership development.

The limitations of our study stem primarily from the cultural characteristics of the Hungarian higher education system and from our specific sample. Institutions must face a status quo situation regarding the role of students, which is formally and legally conserved from several aspects. This is a passive and comfortable status for many stakeholders. But the new generation of students faced with the ever-increasing opportunities will not be satisfied with the status quo. The next level of development requires tremendous work in terms of fostering interrelated changes in the institutional strategy, operation, communication from all participants as this could be the key to successful HE in the short run. According to Matthews (2017), HEIs should fully understand what SaP means in their context and decide how to talk about and foster partnership as an important part of the cultural change process. That is the path that we must take and go through. More efforts should be invested in examining what works in which contexts and in establishing a framework that can bring together the diversified and sometimes isolated actions. Many of the existing approaches may be applicable to other forms of partnership in the operation. We all together should reveal the opportunities for engaging partnership and building on good practices and play a leading role in developing policies to spread partnership practice within our institution. We are serious about the benefits of partnership; therefore, it is our turn to explore how these opportunities could be made available to all.

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ADRIENN MUNKÁCSI

COMPETENCIES REQUIRED FOR THE IMPLEMENTATION OF AN EFFICIENT SUPPLY CHAIN FROM THE PERSPECTIVES OF STUDENTS AND THE LABOUR MARKET

A HATÉKONY ELLÁTÁSI LÁNC MEGVALÓSULÁSÁHOZ SZÜKSÉGES KOMPETENCIÁK HALLGATÓI ÉS MUNKAERŐPIACI SZEMSZÖGBŐL

The supply chain, the system granting customer satisfaction, is an important field in our changing world. This field's profit-oriented companies seek employees with the competencies to achieve their goals. This research's aim was to raise awareness of those competencies that should be developed. The authors questioned 110 supply chain management (SCM) master's degree (MSc) students from Corvinus University of Budapest (CUB) and performed a significance test on their answers. They were asked to assess 17 competency groups and state the extent to which – on a scale from 0 to 100 – supply chain managers need them. One of the most interesting results was the assessment of presentation skills, which indicated differences between the competencies that companies expected and those that students believed were required. This study not only lays the groundwork for further research but also emphasizes the relevance of those competencies to be developed and the rethinking of training outcome requirements.

Keywords: **supply chain management, logistics, master's degree (MSc), competency, labour market**

Gyorsan változó világunkban kiemelkedően fontos terület az ellátási lánc, mint a vevői elvárások kielégítéséhez hozzájáruló, vagy azt biztosító rendszer. Az ellátási lánc területen tevékenykedő vállalat céljai eléréséhez megfelelő képességekkel, készségekkel, attitűdökkel és tudással, vagyis kompetenciákkal rendelkező munkavállalókat keres. A kutatás célja ebből következően az oktatás során fejlesztendő kompetenciák tudatosítása volt. A szerzők megkérdezték a BCE ellátásilánc-menedzsment (ELM) 110 mesterszakos (MSc) hallgatóját, majd válaszaikon szignifikanciavizsgálatot végeztek. A kérdőívben 17 kompetenciacsoportról kellett eldönteni, hogy egy logisztikai, beszerzési, termelési, raktározási, vagy disztribúcióért felelős vezetőnek melyikre milyen mértékben – egy 0-100-ig terjedő skálán értékelve – van szüksége. Az egyik legérdekesebb eredmény a prezentációs készség megítélésben mutatkozott, mely eredmény az elvárt és elvártnak hitt kompetenciák közötti eltérésre mutatott rá. Ezek az eltérések nemcsak további kutatásokat alapoznak meg, hanem az oktatásban fejleszthető, illetve fejlesztendő kompetenciák relevanciáját és talán a képzési kimeneti követelmények újragondolását is előtérbe helyezik az ellátásilánc-menedzsment területén.

Kulcsszavak: **ellátási lánc, logisztika, mesterképzés (MSc), kompetencia, munkaerőpiac**

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Author/Szerző:
Adrienn Munkácsi, assistant lecturer, Corvinus University of Budapest, (munkacsi.adrienn@uni-corvinus.hu)

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Statistics show that, in 2020, there were labour shortages in countless fields and sectors (KSH, 2020a), which supply chain managers (transport and warehousing) also have to face. In the third quarter of 2020, in the transport and warehousing sector, there were 3740 vacancies (rate of vacancies: 1.7%) (KSH, 2020b), which suggests that the most restricting factor for efficiency is not the unemployment rate but the lack of human resources, for which there are numerous potential reasons (Munkácsi, 2019). In a supply chain (transport and warehousing), one of the possible reasons could be the difference between the competencies expected and those developed in the educational system, which indicates a lack of necessary competencies of graduating 'professionals'. Therefore, besides professional knowledge, emphasis should be placed on the development of the abilities and skills that potential employees need to succeed. Most of these are so-called soft skills, for example a complex and critical mindset and advanced communication and collaboration skills (Mihalkovné Szakács, 2014). These are abilities that still cannot be replaced by machines and that, with sufficient care, can be well developed during training.

Our research was based on previously specified competency criteria (e.g. the system approach, decision-making ability, and stress tolerance) determined by national (Patóné, 2006) and international (Derwik & Hellström, 2017; Derwik, Hellström, & Karlsson, 2016; Flöthmann & Hoberg, 2017; Gibson, Gibson, & Rutner, 1998; Keller, 1999; Myers, Griffith, Daugherty, & Lusch, 2004; Thai, Cahoon, & Tran, 2011; Van Hoek, 2001; Murphy, & Poist, 1991) research on some outstanding tasks in the supply chain, with the aim of helping companies to achieve and maintain competitiveness and success. The goal of the present research was to define and compare the – possible – differences between the competencies required and those that the students believed to be required in the supply chain. Therefore, we assessed students' awareness of the expected competencies, as a result of which we can assist in defining the realistic expectations of the labour market. We consider this to be essential because, according to our experience, if students have realistic ideas and expectations concerning their specialization, they can identify more easily with the goals of the training (the training of marketable employees). If the goals and the methods applied to achieve these goals are known, students will be willing to invest more energy and will be more cooperative and more likely to follow the rules during training. These attributes are among the required competencies, and making students recall and apply them can be helpful for their work. Furthermore, they will understand the importance of the applied methods, which might increase their satisfaction. They will be more content with the training and their own performance as members of the workforce, which will most likely also increase the satisfaction of their employers. Thus, our research results can be important for newly graduated students aiming to work in the supply chain, for professors in training, and for potential employers since the expectations defined by the students might influence the processes of training and employment too.

We identify the market expectations using the results of the above-mentioned international research and the European Skills, Competences, Qualifications, and Occupations (ESCO) specifications. ESCO is an important tool supporting the Europe 2020 strategy and the new European skills development project. ESCO's classification determines and categorizes the skills, competencies, qualifications, and professions related to the EU labour market, education, and training. This classification system was developed by the European Commission's Directorate-General for Employment, Social Affairs, and Inclusion with the cooperation of stakeholders and the European Centre for the Development of Vocational Training (Cedefop) (ESCO, 2020a,b). The DeSeCo project – to be mentioned later – is also connected to this. Although, according to our assumptions, which are described later in our hypotheses, students have a realistic picture of the competencies required in each field, most of the time – except for trainees in dual education – they meet the labour market's expectations only after obtaining their degree. Thus, the present research's purpose is to help with students' preparation by developing training that satisfies the real expectations. In the implementation, we relied on our preceding research results (a student survey) and the results of international research.

There were discrepancies between the competencies developed in training and those expected in the workplace (KSH, 2020b) even before starting the research, which also supports our previous view that, besides transmitting knowledge, education, and training, institutions have to emphasize the development of the required competencies based on assessing and continuously following the market demands, which also require flexibility on the part of the institutions. According to Lutz and Birou (2013), for an institution to enter the market with useful training and successful professionals, closer cooperation between industry and education is essential.

Henceforth, to ensure accordance between stakeholders, after defining the concept of 'competency', we discuss the expectations of the supply chain's sub-systems based on the previously mentioned research (Derwik & Hellström, 2017; Derwik et al., 2016; ESCO, 2020; Flöthmann & Hoberg, 2017; Gibson et al., 1998; Keller, 1999; Myers et al., 2004; Thai et al., 2011). Then, we introduce the methodology and results of the research. We examine the students' answers first by field and then by analysing them and comparing them with each other to ascertain whether there is a significant difference between the competency expectations in each field and whether there is a difference between the competencies expected by employers and those believed to be expected by students. We close with conclusions and suggestions.

Literature review

In this section, we provide an overview of, define, and then frame the most important term that we examine and use: competency. This is essential because this concept's boundaries are blurred or mixed with other expressions

(ability, skill, attitude, and knowledge), which might create barriers to interpretation. We sought to eliminate this possibility by clarifying the meaning of the concepts.

Ability and skill

We will see later that, in clarifying the concept of competency, the concepts of ability and skill will be decisive. Ability and skill are often used as synonyms, despite the fact that several definitions seek to clarify the difference. To show the distinction, we present short descriptions. 'If the activity does not require the direct use of consciousness, we perform the activity basically automatically, we talk about skill, but when solving a complex task we need the combination of a wide range of knowledge and skills, we talk about ability' (Falus, 2010, p. 7). Furthermore, Falus et al. (2009) highlighted that 'skill' mostly appears as an ability, despite the fact that it contains three well-separated psychic formations in Hungarian (p. 9):

1. practical skills for the automatic execution of simple operations,
2. skills for partially automated execution of more complex operations, and

Table 1.

Definitions of competency presented by authors

Source	Competency
ESCO, (EQF) (2020, p. 19)	'Competence: The proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations, and in professional and personal development'
Council of the EU (2018, p. 7)	'one's ability to combine Knowledge, Skills and Attitude [KSA's] to show expected behaviour when performing a professional task'
Cedefop (European Centre for the Development of Vocational Training) (2014, pp. 47–48)	'competence ability to apply learning outcomes adequately in a defined context (education, work, personal or professional development) or ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development. Competence is not limited to cognitive elements (involving the use of theory, concepts or tacit knowledge); it also encompasses functional aspects (including technical skills) as well as interpersonal attributes (e.g. social or organisational skills) and ethical values.'
Male, Bush and Chapman (2011, p. 154)	Competency: 'actions, assumed to be manifestations of knowledge, skills, attitudes and dispositions.'
DeSeCo (2004. p. 321)	'competence designates a complex action system encompassing knowledge, cognitive skills, attitudes and other non-cognitive components" "Each competence corresponds to a combination of interrelated cognitive and practical skills, knowledge and personal qualities such as motivation, values and ethics, attitudes and emotions. These components are mobilised together for effective action in a particular context.'
Boyatzis (1982, p. 23; 2008, p. 6)	1982, p. 23: 'A threshold competency is a person's generic knowledge, motive, trait, self-image, social role, or skill which is essential to performing a job, but is not causally related to superior job performance.' '2008 p. 6.: „A competency is defined as a capability or ability.'
Patóné (2006) in Pató Gáborné Szűcs Beáta et al. (2021)	'The set of an individual's characteristics that - through the performance of work tasks - contributes to the achievment of organizational goals.'
Baartman and De Bruijn (2011, p. 126)	competency: 'consisting of integrated pieces of knowledge, skills and attitudes', and it is assumed to be essential for appropriate functioning on the job.
ESDC (2020) (Employment and Social Development Canada)	'Competencies: The combined utilization of personal abilities and attributes, skills and knowledge to effectively perform a job, role, function, task, or duty.' Source: Adapted from the International Society for Performance Improvement, and the **Organization for Economic Co-operation and Development**
Sauber, McSurely and Rao Tummala (2008, p. 375)	'A competency is a statement of learning outcomes based on awareness, a body of knowledge, or a skill. When students exhibit a competency, they demonstrate a specific knowledge or an ability to do certain things. That demonstration illustrates the outcomes of a learning process.'
Athey and Orth (1999, p. 216)	competency is a set of observable performance dimensions, including individual knowledge, skills, attitudes, and behaviors, as well as collective team, process, and organizational capabilities, that are linked to high performance, and provide the organization with sustainable competitive advantage.'
Spencer and Spencer (1993, p. 4)	competencies: 'motives, traits, self-concepts, attitudes or values, content knowledge, or cognitive or behavioral skills – any individual characteristic that can be measured or counted reliably and that can be shown to differentiate significantly between superior and average performers, or between effective and ineffective performers.'

Source: own compilation

3. the ability to perform a more comprehensive activity, the ability.

The DeSeCo (Definition and Selection of Competencies) project – launched by the OECD in 1997 – also drew attention to the content difference between 'competence' and 'skill': 'in the DeSeCo project, the terms "*competence*" and "*skill*" *are not* used as *synonyms*. ... Skill is used to designate an ability to perform motor and/or cognitive acts' (Rychen, 2004, p. 321). The DeSeCo project is embedded into the OECD's long-term Education Indicators Project (INES), which aims to provide measures for the functioning, development, and impact of education and to complement international empirical studies, such as the Programme for International Student Assessment (PISA) (Rychen, 2004). ESCO's description of skills is 'The ability to apply knowledge and use know-how to complete tasks and solve problems. Skills are described as cognitive (involving the use of logical, intuitive and creative thinking) or practical (involving manual dexterity and the use of methods, materials, tools and instruments)' (ESCO, 2019, p. 19). It is also important to mention the interpretation of 'skill' of Employment and Social Development Canada (ESDC) (n.d.): 'Developed capacities that an individual must have to be effective in a job, role, function, task, or duty' (ESDC: Adapted from the U.S. O*Net definition of skills). Skills are, for instance, communication skills and the ability to walk, talk, swim, drive a car, read, write, and so on. In the following, we clarify the concept of competency.

we prepared some tables with a summary of the relevant definitions of competency from the international literature. To form a final position, we tried to find out as widely as possible and to present here the definitions that can be normative for education, for performing well in the world of work, and for the training of future generations. Among the concepts are the definitions by Boyatzis (1982, 2008) and Spencer and Spencer (1993), which are the most cited definitions in the field of *management*, both accepted and applied by organizations supporting competency-based *education* (EQF and Cedefop) and the spread of *employment* (ESCO, EU, DeSeCo, and ESDC) (Table 1).

Male, Bush, and Chapman (2001) examined the general competencies expected of Australian engineers, the normative concept being that of Cedefop (2014). Baartman and De Bruijn (2011), in their research, focused on complex work tasks. Sauber et al. (2008) reported on the competency model developed in the field of supply chain management. Athey and Orth (1999) examined the future competency methods. To obtain an overview of these approaches, explore the existing parallels, and help choose the acceptable normative concept more easily, we prepared Table 2. It shows the presence or absence of the elements (knowledge; skills, abilities, and attributes; attitude and others – KSA) that appear most often in the definition of competencies, broken down by the authors and organizations that are important for our research.

When examining the content elements of the competencies, the presence of the concepts of cognitive knowledge, knowledge, and ability can be observed in all classes. The

Table 2.

Appearance of competency elements by authors

Authors/ competency items	ESCO/ EQF (2020)	Council of the European Union (2018)	Cedefop (2014)	Male et al. (2011)	DeSeCo (2004)	Boyatzis (1982, 2008)	Baartman and De Bruijn (2011)	ESDC (2020)	Sauber et al. (2008)	Athey and Orth (1999)	Spencer and Spencer (1993)
knowledge	x	x	x	x	x	x	x	x	x	x	x
skills, abilities, and attributes	x	x	x	x	x	x	x	x	x	x	x
attitude		x	x	x	x		x			x	x
others	social and/or methodological abilities		functional aspects, interpersonal attributes, ethical values	dispositions	non-cognitive components	motive, trait, self-image, social role, capability			awareness	behaviours, collective team, process, organizational capabilities	motives, traits, self-concepts, values, any individual characteristic

Source: own compilation

Competency

Regarding the concept of competency, we used the definition applied by ESCO and the European Qualification Framework for Lifelong Learning (EQF), in which competence is defined as 'The proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations, and in professional and personal development' (ESCO, 2019, p. 19), which suggests that a person facing new situations and unexpected challenges can use his knowledge and skills in a self-directed manner (ESCO, 2020). To accept or reject this approach, 'attitude' line contains an 'x' only if it has been displayed in the definition by the authors themselves. In our research, we have often experienced a situation in which, although the term attitude itself did not appear in the definition, its content elements, for example behaviour, conduct, habit, or action, did. In our case, ESCO, Boyatzis, Sauber et al., and the ESDC are among these authors. Thus, it can be said that the theoretical background presented supports our commitment to the approach applied by ESCO and the Council of the European Union (2018). Henceforth, we adopt the following definition of competency:

Competency: The proven ability to use knowledge, skills, and personal, social, and/or methodological abilities in work or study situations and in professional and personal development. It is one's ability to combine knowledge, skills, and attitude (KSA) to show the expected behaviour when performing a professional task.

In the following, we present a review from the employer and student perspectives and then compare results with the expected competencies of the supply chain. We determined the employers' expectations based on research found in the literature (Derwik et al., 2016; ESCO, 2020; Flöthmann & Hoberg, 2017; Hoberg, Alicke, Flöthmann, & Lundin, 2014; Keller, 1999; Munkácsi & Demeter, 2019; Patóné, 2006; Thai et al., 2011), while the students' assessments were based on our own research.

Expected competencies in the supply chain fields

In the last three decades, there has been a continuous transformation in almost all fields of the supply chain, which has greatly influenced the expectations of and competency criteria for employees. According to Thai et al. (2011), nowadays, a successful logistics manager must have not only expertise but also business, logistics, and management skills.

This is supported by the research by Derwik and Hellström (2017) and Derwik et al. (2016), which explored managers' competencies in the logistics and supply chain field. As their final conclusion, they identified five major competency groups. Below, in the parentheses, the contents of each competence group and then the extent of their use during the daily activities and decision making of managers can be seen:

1. business managerial competence (dynamic awareness, business and stakeholder management) (observations 30–40%),
2. generic competence (communication and cognitive abilities) (20–30%),
3. behavioural competence (intrapersonal and interpersonal) (15–30%),
4. functional competence (technology and administrative routines) (5–20%),
5. supply chain management expertise (supply chain management areas of expertise and applied analyses) (0–5%).

Their results are consistent with our previous statement that, in education today, the development of soft skills is indispensable. Although professional knowledge is important in managers' everyday practice, without these skills and abilities, no one is capable of becoming a successful logistics manager. Flöthmann and Hoberg (2017) identified further abilities for complex daily tasks, such as a complex perspective and mindset, proficiency in different business fields, such as strategic decision making, communication, and management, intercultural skills, and analytic and informatic skills. According to Hoberg et al. (2014), those who work as managers in any field of logistics nowadays can be called 'decathletes'. Kovács and Pató (2014) stated that the required general competencies for transporters in supply chains are the following: make well-informed de-

Table 3.

Task definitions and connection to our own research

Positions	ESCO definition by highlighting competencies	Competencies appearing in ESCO from our research
Logistics and distribution managers	"Logistics and distribution managers **take decisions** on logistic services, operations and provisions. They **take** internal and external variables **into consideration** for **effective and successful** organisational logistic services. They **give** appropriate **support** to all the activities of the supply chain from the beginning to the end. These professionals **organise** the storage and distribution of goods and **ensure** that the right products are delivered to the right location on time and at a good cost."	complex mindset-system approach, collaboration skill, communication skill, management ability, ability to organize, work in a team, decision-making ability, business approach, stress tolerance, ability to control and evaluate, consistency, ability to follow the rules
Purchasing managers	"Purchasing managers are in charge of **buying goods**, equipment and services for their company, and try to ensure the most competitive prices. They are also **responsible** for **negotiating contracts**, reviewing the quality of products and **analyzing** suppliers, and the use and resale of goods and services."	negotiation skills, complex mindset-system approach, communication skill, organizational skills, management ability, decision-making ability, business approach, customer focus, ability to follow the rules
Industrial production managers	"Industrial production managers **oversee** the operations and the resources needed in industrial plants and manufacturing sites for a smooth running of the operations. They **prepare** the production schedule by **combining the requirements of clients** with the resources of the production plant. They **organise** the journey of incoming raw materials or semi finished products in the plant until a final product is delivered by coordinating inventories, warehouses, distribution, and support activities.	complex mindset-system approach, collaboration skill, ability to organize, customer focus, decision-making ability, business approach, management ability, ability to control and evaluate, ability to follow the rules
Warehouse managers	"Warehouse managers assume the **responsibility for** storage facilities. They **manage the operations and the staff** within."	complex mindset-system approach, collaboration skill, communication skill, management ability, ability to organize, work in a team, decision-making ability, ability to control and evaluate, consistency, business approach, ability to follow the rules, presentation skills, customer focus
Distribution managers	"Distribution managers **plan** the distribution of goods to various points of sales."	complex mindset-system approach, collaboration skill, communication skill, management ability, ability to organize, work in a team, decision-making ability, business approach, ability to control and evaluate, consistency, ability to follow the rules

Source: ESCO (2020a); own compilation

cisions swiftly, organize their own work and the work of others in an efficient way, communicate effectively with customers and other departments, coordinate work with the rest of the team and other departments, and act as an 'entrepreneur' when conceiving new business plans and networking outside the company. Pató, Kovács, and Pató (2006) listed the following necessary competencies: reliability, fairness, cultivated appearance, firmness, independence, communication skills, problem-solving ability, elaborateness, and result orientation.

Next we turn to the competency expectations for purchasing, production, warehousing, and distribution as the supply chain's fields or sub-systems. First, it is necessary to clarify the basic concepts in the fields and the tasks of the managers so that each reader understands the same contents of the given concepts. In our research, we defined the tasks following the ESCO definitions. The purchasing, production, warehousing, and distribution processes are parts of the so-called logistics system. 'It is the system of material flows and stocks, as well as the information and management structure connected to them' (Chikán, 2017). Purchasing, production supply, and distribution/sales are the three main phases/fields of the logistics process, which can be interpreted separately as the customer service cycle (Chikán, 2017; Demeter, Gelei, Jenei, & Nagy, 2009). The warehousing tasks come into focus when there is stock accumulation because something hinders (breaking point) the process of the flow. This can also happen between the sections of purchasing and production or between production and distribution. ESCO (2020a) provided precise definitions of managers' tasks in the fields, from which we summarize the competencies appearing in our research in Table 3.

ESCO provides numerous alternatives for naming a position, for which – when looking any of them up – the same content appears. In the case of logistics manager, the default setting on ESCO's website is logistics and distribution manager, but the alternatives include logistics manager, which we use. For each position, ESCO divides the expectations in the given field into four levels. These levels are always based on essential skills and competences, then the essential knowledge follows, later the optional skills and competences, and last the optional knowledge. In our research, we focused (Annex 4) on the levels of essential skills and competences and optional skills and competences, which we used to compare the previous national and international research and the competencies that we examined. Reviewing Annex 4, three findings can be made: 1) it explains the competencies that are specifically expected in more detail than any research before, 2) all of these can be classified into our examined categories, and 3) the same type of task can be found with different wordings. The fact that the ESCO competencies can be classified into our categories allowed us to treat the competencies of our research as category groups. After defining the concepts and reviewing the important literature, we first present the methodology applied in our research and then the students' assessments of the competencies expected in the supply chain, which we also compare with the ESCO database.

Methodology, data collection, and data analysis

One of the aims of our research is to raise awareness among students participating in higher education (MSc) in the fields of supply chain management of the competencies that are required and that they should develop for successful employment by comparing students' opinion with national and international research results. It is likely that students – before applying to the supply chain management specialization – are familiar with the specifics and the criteria of employment and have a realistic picture of the expected competencies. Therefore, we set up two hypotheses:

H1: Students know that the most important labour market expectations of a logistics manager are a systems approach and management ability, which stand out significantly even compared with the assessments of the other managerial positions.

H2: Students know that the most important labour market expectations of a purchasing manager are negotiation and communication skills, which stand out significantly even compared with the evaluation of other managerial positions.

We note that, in our competency questionnaire, based on the research by Keller (1999) and Patóné (2006), the 23 competencies of the EU divided into three groups (managing, work, and key), defined in 2006, can also be identified (Annex 3). For the inquiry, we used an online questionnaire, which was shared twice with students at CUB-SCM (2017–2020). The method used for conducting the survey was the same in both cases. With the help of the groups' professors or people with responsibility, a link to the questionnaire appeared on a platform that was visible to all the members of the group – Facebook or Microsoft Teams – with a short message about the purpose of the research, and it could be filled in by using either a computer or a mobile phone. In total, 110 questionnaires could be evaluated. The questionnaire consisted of 14 questions, which included some data about the respondent (age – given on an interval scale, gender, nature of training, and name – as an optional parameter) and, the important elements of the research, questions to be answered on an adjustable scale between 0% and 100%, such as: 'According to your opinion, how essential are the listed competencies (17) for 1. a logistics manager, 2. a purchasing manager, 3. a distribution manager, 4. an industrial production manager, and 5. a warehouse manager'.

The other questions referred to the development of the listed competencies and the respondents' methodological awareness and assessment of their usefulness, the results which can be found in a previous publication (Munkácsi & Demeter, 2019). The database established is presented in Table 4.

Since there was no significant difference between the two samples, based on either age or gender distribution – which the chi-square test also proved – we handled the answers as one sample. In the following, we present the assessment of the expected competencies from a student

perspective following two approaches. We first compare our results with national (Patóné, 2006) and international (ESCO, 2020; Keller, 1999) research by field (logistics, purchasing, production, warehousing, and distribution) and then by competency. Figure 1 and Table 6, which already contain the data side by side and ranked, serve to help monitor the results.

we handled this 'field' as the expected competencies of a logistics manager. The following graph (Figure 1), aligned with the summary table, shows the student assessment for each manager by competency. Due to small deviations and the easier perception of outliers, the scale starts at 55% on the Y axis. To help ensure traceability, a concrete value was indicated for the outliers.

Table 4.

Information about the database

			Gender		Age		
	%	Person	Female	Male	21–23	24–26	27–30
I. Data collection	49	54	40	14	10	44	0
II. Data collection	51	56	35	21	28	26	2
Sum	100	110	75 (67.6%)	35 (32.4%)	38 (34.6%)	70 (65.38%)	2 (0.02%)

Source: own compilation

Labour market expectations by field

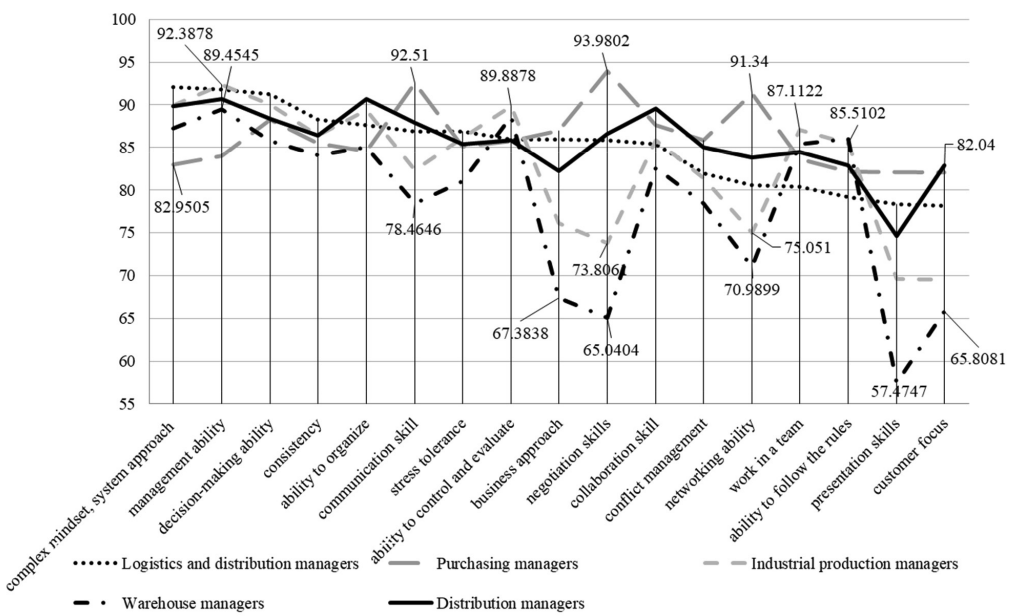
The first field is the 'logistics manager competencies', regarding which we can remark that, in the enclosed Tables 1 and 2, containing the specific expectations, the competencies of the logistics manager appear as 'expected comprehensive competencies in the logistics field within the company', because the research by Keller (1999) referred to two positions: logistics senior executive and supply chain manager. In Patóné's (2006) research, we started with the assumption – since no specific position was named – that the comprehensive competencies in the company's logistics field are the abilities and properties that a logistics manager has, along with other characteristics, for example knowledge, experience, and skills (see the definitions of competency presented earlier). Therefore,

Expected competencies of a logistics manager

In this position, communication and presentation skills (Keller, 1999) are outstandingly important, of which presentation skills are the least important for students; only customer orientation received lower scores. This is very surprising because a manager must have not only appropriate communication skills but also presentation and lecturing skills to be able to achieve the goals. The next unexpected result is that the ability to follow rules, which is very important for a manager because of the need to set an example, has also been pushed into the background. The system approach also plays an important role for logistics managers as a specific competency – comprehensive vision – in Keller's research. Decision-making ability is also included among the most important competencies;

Figure 1.

Differences in the assessment of managers' competencies



Source: own compilation

according to Keller, it is a specific expectation – effective decision-making ability – and, in the research by Patóné, decision-making ability is a general expectation. Students ranked organizational skills among the top five competencies, identified as specific in both studies. For Keller, it relates to the supply chain manager position. According to ESCO, logistics managers have much more specific (S=21) (expected in the given field) competencies besides the 'generic' (G=13) managerial qualities (Annex 4) than in previous research.

Expected competencies of a purchasing manager

Based on Keller's research (1999), a purchasing manager's specific competencies are the use of communication techniques, conflict management, and the ability to conduct meetings. In Patóné's (2006) research, there are significantly more expectations among the specific competencies, such as negotiation skills, a comprehensive vision, the ability to control, a complex mindset, customer orientation, and so on. According to our research results, the most important requirement for a purchasing manager is negotiation skills, which are a specific competency both in Keller's (1999) – ability to conduct meetings and use of communication techniques – and in Patóné's (2006) research, as well as customer orientation, which surprisingly occupies the last place. In the second place is communication skills, then networking, decision-making, and collaboration skills, which are among the generic expectations in Patóné's (2006) research. The ranking of these competencies – except for customer orientation – reflects students' good insights into the expectations of a purchasing manager. As for purchasing managers, it is surprising that communication skills do not appear as an expectation for ESCO, while, according to the students, it is the most important in this field. 'Handling customer relationships' and 'conducting meetings …' suggest the expectation of communication skills. Despite occupying the midfield in the research, conflict management, consistency, and stress tolerance are completely absent. Teamwork (ranked 13th) and collaboration skills (ranked fifth) are also missing from ESCO's list, which rather features the characteristics necessary for effective decision making and a systems approach. Field-specific competencies determine the composition of the list the most (with a ratio of 25/15).

Expected competencies of an industrial production manager

Patóné (2006) did not specify competencies in this field, but in Keller's (1999) research, among the specific competencies, there are controlling and developmental skills, time management, and motivational skills. Placing management skills in first place is a remarkable idea for the future managers of logistics, since it concurs with the field-specific expectations, in the same way as control, evaluation, decision-making ability, and systems approach. Customer orientation is the least expected attribute, which is a realistic view in the case of a production manager. For ESCO, in the case of production managers, the system approach has an important role in the planning, organizing, managing, and controlling of production processes. These tasks are mostly included. Interestingly, there are elements among the optional expectations that can be found in the case of logistics, warehouse, or purchasing managers, for example analysing supply chain strategies or assessing supplier risk. Another interesting fact is that, after the basic competencies, the following were mentioned as optional: define manufacturing quality criteria (define quality standards), develop manufacturing policies (create manufacturing guidelines), and schedule production (adjust the production schedule), highlighting the importance of these specific tasks.

Expected competencies of a warehouse manager

Keller's (1999) research identified two positions: warehouse inspector and warehouse manager. The most conspicuous difference is that, while the students ranked presentation skills last, Keller (1999) considered them as a specific competency. The managing, controlling, and evaluating skills, the systems approach, and the ability to follow rules are listed amongst the most important expectations, which is consistent with both previous studies. Patóné (2006), for instance, marked reviewing ability and consistency as specific competencies, which are compatible with the systems approach and the ability to follow rules. Furthermore, in this field, the greatest difference can be observed between the most important (management skills: 89.45%) and the least important (presentation skills: 57.47%) elements.

It is interesting that the students found decision-making ability to be much more important – in line with earlier research – than customer orientation, which was the third least important element. We emphasize these two competencies because, in modern warehouses, everything is controlled by machines and software, for example the placement of goods, the order of removal, the schedule, and the need for human resources. Almost all processes are strictly regulated, and managers do not really have to make independent decisions. In turn, if a warehouse is not customer oriented and goods are late or damaged, outstandingly high costs can arise (e.g. compensation costs, loss of customers, and loss of future orders). The warehouse manager's competencies were the most extensively explained by ESCO of all the managers examined. From the expectations listed here, we found two – 'maintain updated professional knowledge' and 'have computer literacy' – that do not fit into our list of 17 competencies. For the categorization of the other characteristics from our groups, decision-making ability, conflict management, stress tolerance, and negotiation skills did not emerge as labour market expectations for a warehouse manager. Most attributes could be categorized as 'ability to follow rules'. The additional 7-7-7 requirements could be arranged in the categories of management skills, system approach, and organizational skills, which, according to the students, are the most important for a warehouse manager. Our earlier statement that a warehouse manager no longer really needs independent decision-making ability but

must have a customer-oriented approach seems to be proven here. In the case of ESCO, the costumer focus appears from various angles, for example performing services in a flexible manner, acting reliably, showing confidence, building business relationships, and improving business processes.

Expected competencies of a distribution manager

In this field, management skills are the most important competency according to both students and international research, along with organizational skills, according to the students to the same extent. It is interesting that, while Keller considered these to be a leadership skill, in Patóné's

Table 6.

Significant differences in the assessment of managers' competencies

BLACK-normal	not significant deviation	p>0.05
BLACK-BOLD	significant deviation	p<0.05
GREY	highest value within a given competency	
(....)	e.g. in ESCO	(1-5): 5 most important competency

Managers/ expected competencies	**Logistics and distribution managers**	**Purchasing managers**	**Industrial production managers**	**Warehouse managers**	**Distribution managers**
complex mindset, system approach (develop…, plan.., analyse)	92.09	**82.95**	**(3) 89.9694**	**(3) 87.2828**	**(2) 89.899**
management skills	91.80	**84.02**	(1) 92.3878	**(1) 89.4545**	**(1) 90.7374**
independent decision-making ability	91.24	**(4) 88.28**	(2) 90.0204	**(5) 85.8182**	(4) 88.3636
consistency	88.26	**85.52**	86.44	**84.07**	86.39
organizational skills (manage staff)	87.61	**84.57**	(5) 89.4082	**85.06**	(1) 90.7374
stress tolerance (handle stressful situations, stress management)	86.88	**85.17**	86.17	**81.03**	85.44
communication skills	**86.88**	(2) 92.51	**82.36**	**78.46**	**(5) 87.9293**
ability to control (monitor) **and evaluate**	**85.95**	**85.77**	(4) 89.8878	(2) 88.6263	**85.88**
business approach (consider economic criteria in decision making)	85.92	86.99	**76.13**	**67.38**	82.28
negotiation skills	**85.89**	(1) 93.9802	**73.81**	**65.04**	**86.59**
collaboration skills (liaise with colleagues)	85.41	(5) 87.6139	85.87	**82.63**	(3) 89.6263
conflict management (liaise with colleagues)	**81.99**	85.85	**81.37**	**78.48**	85.07
networking skills	**80.55**	(3) 91.34	**75.05**	**70.99**	**83.80**
ability to work in a (logistics) **team**	**80.36**	**83.64**	87.11	85.36	84.48
ability to follow rules (comply)	**79.14**	**82.11**	85.51	(4) 86.0202	**82.90**
presentation skills	78.38	nd	**69.59**	**57.47**	74.67
customer orientation	78.12	82.04	**69.49**	**65.81**	82.86

Source: own compilation

research, they are not even among the generally expected competencies. Next in the ranking, with a difference of no less than 1 percentage point, is the systems approach, which the national research listed among the generally expected competencies, as in the case of the purchasing and warehouse managers. Specific competencies in Hungary include technical sense and emotional stamina. Stress tolerance – strongly attached to the latter – was ranked among the moderately expected competencies by the students. As an interesting curiosity, we can point out that independent decision-making ability was only emphasized among the generally expected characteristics by the international research. In the national research (Patóné, 2006), it is the only field in which it did not appear.

The importance of communication skills is increasingly supported by the fact that both Keller's and Patóné's research listed it as a generally expected competency in all fields. The students, however, allocated it 'only' to the sixth place. According to our results, the selection and recruitment ability from Keller's research is best covered in terms of content by organizational skills (first–second place) and independent decision-making ability (fourth place), but other competencies may be useful in this position, for example the systems approach, the ability to control and evaluate, and even the business approach. In our opinion, in this field, the criterion for Keller's (1999) developmental and time management ability is mostly defined by the business approach, for which students are highly likely to have a different view as they ranked it in the penultimate place. Having introduced the expectations in each field, we will now summarize the significant differences in the assessment of each manager competencies.

Labour market expectations by competencies

Table 6 helps in exploring the correlations, and, in our analysis, we considered the systems approach, the most expected competency in the logistics managers' field, as the baseline. The order of the competencies in the table was thus determined by the order of importance outlined against it. Furthermore – proceeding (by line) by competencies – we marked the highest value in each competency with grey, and the ones that show significant deviation with bold black. To perform the significance test, we applied the Wilcoxon test, in which the initial baseline was always the highest value (grey) of the given competency. The result indicates the manager(s) for which it shows a significant deviation in the assessment of the given competency. With the following table, we focus on analysing these significant differences.

The initial baseline is the system approach – the most important attribute of logistics managers. We can see for this characteristic that – according to the students – there is no other manager field requiring complex vision and the ability to think in systems as much as logistics managers (92.08%); these are indispensable, since they have to unite all the other fields. The 2.12% lower value for production managers was already enough to determine a significant deviation. The significance values were .000 for the purchasing manager, .010 for the warehouse manager, .039 for the distribution manager, and .047 for the production manager. According to the students, the above competency is the least expected – with a 9.13% difference – of purchasing managers, which is clearly visible in Figure 1. Management skills were assessed as most important for the production and the logistics manager. Therefore, there is no significant difference between these two (sig.: .214). However, there is in the case of the three other managers (sig.: .000, .001, .011); furthermore, we see a decrease of more than 8% for the purchasing manager (sig.: .000). In the assessment of the independent decision-making ability, there is no significant difference between the logistics (91.23%), the production (90.02%), and the distribution (88.36%) manager. In spite of a few hundredths of difference between distribution and purchasing managers (88.28%), we can see a deviation that is already significant. In the same way, this applies to warehouse managers (85.81%), for whom independent decision-making ability has already been a fundamental expectation in the earlier national and international research, but – as we mentioned previously – nowadays it is not really expected because of automation. Indeed, of all the managers, they are the ones who need this competency the least, so here the students were correct. It is interesting, however, that, despite of all this, it appears in the fifth place in the competencies of warehouse managers, so it is among the most important ones.

In the assessment of consistency, the same tendency appears for independent decision making (highest for the logistics manager (88.25%) and deriving the most significance for the purchasing and warehouse managers). The values change the least here; in total, there is a difference of 4.18% between the highest and the lowest (warehouse manager) value. Organizational skills appear with the highest value (90.73%) for the distribution manager, but the difference of more than 3% compared with the logistics manager is not significant. Hence, organizational skills have, as for the production manager in these three positions, the same importance. However, for the purchasing and warehouse managers, due to the different natures of their tasks, it counts as a less relevant ability, with 84.57–85.06%.

Communication skills are one of the four competencies (with *systems approach*, *negotiation skills*, and *networking skills*) for which, compared with the highest value (here for the purchasing manager: 92.51%), there is a significant distinction in the values in all the fields (for the logistics manager, sig.: .001; for the others: .000). The students considered it to be the least significant for the warehouse manager (more than 14.05% difference, 78.46%). This is very surprising, even compared with the results of the national and international research, in which communication skills appeared as a generally expected competency on the manager level. For stress tolerance, as well as for decision-making ability and consistency, the logistics manager is in the 'first' place (86.88%) and, compared with the purchasing and warehouse managers, shows a significant difference from the lowest value (81.03%). It is worth mentioning that, to arrive at this distinction, only a

1.71% difference (in the case of the purchasing manager) was enough.

Interestingly, the ability to control and evaluate appears to be the most expected (89.88%) for the production manager. This is also the competency, along with the ability to work in a team, that is thought to be similarly important for warehouse managers (distinction within 2%); therefore, it does not show a significant deviation. The ability to control and evaluate was found to have around 85.8% (+/- 0.1% difference) significance, which has already been indicated in the test. We can remark that the students, in the course of class or home teamwork, hardly gave any feedback about their fellow students' work. In our opinion, the reasons for this could be a deficiency of appropriate communication techniques or their inexperience with assertive communication. Hence, it is essential to pay special attention to the development of this field.

The biggest difference lies in the assessment of the business approach. We emphasize the acquisition and proper usage of this aspect as early as in the bachelor's degree, but even more so in the master's degree. As our main aim concerns the training of managers, we assume that students find it essential for every manager. However, the results show the contrary. Here, the distinction is almost 20%. While the value for the purchasing manager is 86.99%, for the warehouse manager it is 67.38%. Compared with the purchasing manager, the logistics and distribution managers show no significant difference, but the production and warehouse managers do. Negotiation skills appear with the biggest deviation (28.94%). The highest value, 93.98%, seen for the purchasing manager, is understandable and acceptable. The significant differences can be explained by the large deviation, which was proved for every manager during the test with significance of .000. The warehouse manager, with 65.04%, has the least need to possess this competency. Collaboration skills are an important criterion for each manager, since a good leader has this attribute. The students confirmed this with a 7% deviation; the interesting point is that they assigned the highest value to the distribution manager, and a significant difference could be seen only for the warehouse manager. There was only one interesting case – the distribution manager – in which conflict management did not show a significant difference from the purchasing manager (85.84%).

Between the most and the least important values, the differences are within 7.36%, which supports the conflict management significance amongst the manager attributes. The networking ability is the attribute with the third-biggest deviation (20.36%), which in all cases shows a large difference from the purchasing manager (91.34%). The distribution manager's – that is, the following one in the row – 7.55% lower value, then the logistics manager's more than 10.5% difference and the warehouse manager's 20.36% decrease support this idea, although the exact causes are not clear and could be examined in future research, as in the case of the other significant differences. Teamwork today belongs to almost all positions' fundamental expectations, and, although we have already mentioned it, we would like to highlight that students found it to be the most important for the production manager (87.11%), along with the ability to control and evaluate and management skills. The 6.76% difference also supports the idea that students find it important too, for every manager, in spite of the significant differences for the logistics and purchasing managers. The following is the only ability that is the most expected for the warehouse manager: the ability to follow the rules in this case (86.02%) shows a 6.89% difference from the lowest and a significantly deviating value from that of the logistics manager (79.13%). However, in the case of the distribution and the purchasing manager, we already consider the not quite 4% to be a significant deviation.

After the assessment interval of the negotiation skills (28.94%), the second-largest category is the presentation skills, which students classified as being expected most of all from the logistics (78.37%) and the distribution manager. The 3.71% difference between the two does not yet belong to the significantly deviating category; however, the assessments of the production (69.59%) and the warehouse manager (57.47%) do by all means. Customer orientation is the competency with the fifth-widest scale, which was proved in the course of the test by the difference between the distribution manager (82.85%) and the 17.05% lower-rated warehouse manager.

Evaluation of the results

In summary, the systems approach and the management skills obtained significantly higher values for the logistics manager, for whom the most important competencies are decision-making ability, consistency, stress management, and presentation skills. In the light of this, we accept hypothesis H1, which was set up to determine the most important criteria for a logistics manager. Furthermore, since, compared with the purchasing manager, there was a significant decrease of values for communication skills, negotiation skills, conflict management, and networking skills, we also accept hypothesis H2, which was formulated regarding the expectations of a purchasing manager. Therefore, the significantly higher values for negotiation and communication skills in the case of the purchasing manager show the students' awareness of the labour market expectations. For the logistics manager, the ability to control and evaluate and teamwork differed significantly from the values for the production manager, and, in the ability to follow the rules, we can see a significant difference from the warehouse manager's result. Thus, we can say that the scores of the students' research vary between 93.98% (negotiation skills of the purchasing manager) and 57.47% (presentation skills of the warehouse manager), which we present in the diagram (Figure 1). The test results were always specialized with regard to the given competency, since it is possible that a 2–3% difference is already significant in one field, while even a 4–5% difference does not count as significant in another (e.g. regarding the business approach, the purchasing and distribution managers' 4.71% difference is quite large, yet the test did not indicate this, while, for the system approach, the 2.11% difference between logistics and production counts as significant).

In the assessment of the competencies, six fields showed a difference between the highest and the lowest value between 14.05% and 28.94%. The biggest difference appeared in the assessment of negotiation skills, close to 30% in favour of purchasing (93.98%) against warehousing (65.04%). The presentation skills differed by more than 20.9% between the logistics manager (78.37%) and the warehouse manager (57.47%). For the networking skills, there was a 20.36% difference between purchasing (91.34%) and warehousing (70.98%). It is also interesting that the business approach, albeit with just over 1%, seems to be more important for a purchasing than for a logistics manager, not to mention the 19.61% lower value for the warehouse manager. Regarding customer orientation, this difference is 17.05% between the distribution and the warehouse manager, in favour of the former. Communication skills are at the end of the row among the outstanding values, with a 14.05% difference between the purchasing and the warehouse manager. Therefore, we can say that, according to the students, in the case of the warehouse manager, except for the ability to work in a team and the ability to control and evaluate, the competencies are significantly less expected. Furthermore, we can remark that the ability to follow the rules was the only one with the highest assessment for the warehouse manager.

Based on the results, it is apparent that the most and least important competencies for a logistics manager are the system approach (92.08%) and customer orientation (78.11%). For a purchasing manager, negotiation skills (93.98%) and customer orientation (82.04%) are the two extremes. For a production manager, the most important is management skills (92.38%), whilst customer orientation has 69.48% importance. The biggest deviation between the most and the least expected competencies appears for the warehouse manager, specifically in the case of management skills (89.45%) and presentation skills (57.47%). In the case of the distribution manager, these extreme values are shown by management skills (90.73%) and presentation skills (74.66%).

Conclusion

The main motivation of our research was to raise awareness of the competencies required for employment in the supply chain field – aided by contrasting the latest (ESCO, 2020) and the former international research (Keller, 1999) with the results of our research. Through this comparison, those skills and abilities that have to be developed to help students' gain employment and prepare to meet the labour market expectations were emphasized.

We made some suggestions regarding their preparation and utilization of the results. Our results reflect students' evaluation of the competencies required in the fields of the supply chain. This information can be implemented in several ways in the course of training. 1) With the involvement of students: informing students of the results of the research (confrontation), then providing an opportunity for them to offer their opinions. Students would have the possibility individually but also in groups to make development suggestions (educational methodology, the promotion of raising awareness, and the collecting and sharing of professional experience). These suggestions would be evaluated by professors and company managers (in the SCM field) both individually and jointly, and the best ones could be implemented in the curriculum. 2) With the involvement of professors: the knowledge of the results, on the one hand, can help them in choosing the competency-developing methods to be applied in classes, which could increase the effectiveness of the training; on the other hand, it could help to adjust the students' ideas to the market expectations, facilitating the establishment of consistency between the parties. In our opinion, it is important to inform students about the aim of each applied method and its role in achieving practical effectiveness. The methodological support of the professors would be ongoing in the meantime. 3) With the involvement of dual partners and other involved business managers: If employers know the students' perceptions, then, on the one hand, with the help of lectures, they could broaden the minds of students regarding the expected requirements, and, on the other hand, with targeted training and mentoring programmes, they could prepare for the reception of freshly graduated students.

The investigation pointed out numerous differences and accordance between the expected and the assumed competencies. These were supported by the accepted hypotheses, and the extreme assessments were discussed in detail when introducing the results. For instance, presentation skills, according to the students, are the least important for the warehouse manager, while, according to ESCO, they appear here and for the distribution manager as an expectation.

Consequently, there are fields and competencies for which students have to be made aware of the importance and assessment and which have to be developed for them to become marketable employees. The competencies published by ESCO (2020), containing the market expectations of the supply chain, surpass in detail the lists of employer expectations available so far, which we can subordinate to the competencies that we used as umbrella terms, so the labour market expectations used by ESCO regarding purchasing, production, warehouse, distribution, and logistics managers can be classified into the 17 competency groups that we examined. These groups contain several operations/activities that can be developed to help students to become successful in the labour market. To achieve this, it also helps to distinguish the ESCO-listed competencies according to their specific or generic nature (marked in Annex 4) since, during training, there is a greater possibility to develop the 'generic' competencies – which are not profession specific and can be expected of every manager – while the specific attributes come into view and can be developed when already occupying the given position.

There are limitations to our paper. Unfortunately, since the labour market expectations are swiftly changing and percentile results indicating employers' opinion are not available, there is no possibility of setting up a ranking like that in the case of students. Thus, the next step

would be to question employers and set up a new database in accordance with the market needs, taking into consideration each level of national and international education and the levels of the positions. Most of the examined competencies are such skills and abilities that can be said to be generally expected of managers; therefore, in secondary and higher education, more attention should be paid to the problems of educational methodology as, with clarification, soft skills – which are becoming more important – can be developed more effectively.

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Annex

1. Expected specific competencies in certain areas of supply chains based on Keller (1999)

Expected competencies in purchasing	Expected competencies in warehousing	Expected competencies in production	Expected competencies in distribution	Expected comprehensive competencies in the logistics field within the company
use of communication techniques	*Warehouse inspector:*	decision-making ability	control ability	*Logistics managers:*
use of conflict, and stress management techniques	ability to train people	ability to control	developmental ability	ability to build, maintain, and develop a logistics organization
ability to conduct meetings	ability to control (ability to evaluate performance)	developmental ability	effective decision-making ability	selecting, developing, motivating, and controlling the right people
	communication skills	time management ability	time management ability	team-building ability
	ability to motivate	excellent communication skills	selection, and recruitment ability	communication, presentation skills
	stress management	ability to motivate	communication skills	decision-making methods, and techniques
	time management ability		ability to teach others	*Supply Chain Manager:*
	user-level management of technical devices		leadership skills	comprehensive vision
	organizational skills			stress, and conflict management
	Warehouse manager in addition to these:			project management skills
	decision-making ability			communication, presentation skills
	presentation skills			organizational skills
				effective decision-making ability

Source: Munkácsi & Demeter (2019); own compilation (2020)

2. Expected specific competencies in certain areas of supply chains based on Patóné (2006)

Expected competencies in purchasing	Expected competencies in warehousing	Expected competencies in the field of transport and material handling	Competencies related to comprehensive logistics within the company
comprehensive vision	endurance, adaptability	emotional stamina	information management, organizational awareness
team-building ability	well-groomed, good-looking, reviewing ability	technical sense	initiative skills
ability to control	extroversion, attention		creativity
responsibility	conflict management		logical thinking
expressiveness	consistency		confident attitude
risk-taking skill	directness		quality awareness
complex mindset	solvency, methodicality		being motivated
negotiation skill	systematism		work organization ability
company-level mindset	professional aptitude		independent work
customer orientation	courtesy		flexibility

Source: Munkácsi & Demeter (2019); own compilation

3. Categories and grouping of the 23 personal competencies in the EU's research programme (2006)

Key competences	Work competences	Management competences
communication	flexibility	leadership
quantification skills	creativity	ability to motivate others
teamwork	early independent decision making	the ability to learn from mistakes
problem-solving ability	knowledge of foreign language(s)	ability to handl contacts, and build new contacts
ability to learn, and develop performance	confidence	ability to influence others
	critical approach	ability of decision making
	ability to explore new opportunities	ability to focus on the results, and the execution of processes
	responsibility	ability to build strategies
	capacity to act	ethical approach

Source: Fabulya et al., (2017); own compilation

4. ESCO's fundamentally and optionally expected competencies in certain fields of logistics marked as 'Generic (Gen.)' and 'Specific (Spec.)' competencies

Gen./ Spec.	Essential skills and competences logistics and distribution manager	Gen./ Spec.	Essential skills and competences purchasing manager	Gen./ Spec.	Essential skills and competences warehouse manager	Gen./ Spec.	Essential skills and competences industrial production manager	Gen./ Spec.	Essential skills and competences distribution manager
S	analyse relation between supply chain improvement and profit	S	analyse logistic changes	G	apply safety management	G	adhere to organisational guidelines	G	adhere to organisational guidelines
S	analyse supply chain strategies	S	analyse supply chain strategies	G	build business relationships	S	adjust production schedule	S	carry out inventory control accuracy
S	analyse supply chain trends	S	analyse supply chain trends	G	coach employees	S	assess impact of industrial activities	G	carry out statistical forecasts
S	anticipate the overhaul of the fleet	S	assess supplier risks	G	comprehend financial business terminology	S	check material rescources	S	communicate with shipment forwarders
S	communicate with shipment forwarders	S	coordinate purchasing activities	G	create a work atmosphere of continuous improvement	G	control financial resources	G	create solutions to problems
G	comply with checklists	S	estimate costs of required supplies	G	create solutions to problems	S	create manufacturing guidelines	G	develop financial statistics reports
S	conduct full-scale emergency plan exercises	G	follow company standards	S	ensure efficient utilisation of warehouse space	S	define quality standards	S	ensure customs compliance
G	consider economic criteria in decision making	S	identify suppliers	S	ensure stock storage safety	G	liaise with industrial professionals	S	ensure regulatory compliance concerning distribution activities
S	control reorder points	G	issue sales invoices	G	exert a goal-oriented leadership role towards colleagues	G	manage budgets	S	forecast distribution activities
S	coordinate dock operations	G	liaise with managers	G	give instructions to staff	S	manage resources	S	handle carriers
S	develop efficiency plans for logistics operations	G	maintain relationship with customers	S	identify software for warehouse management	G	manage staff	G	have computer literacy
G	encourage teams for continuous improvement	S	maintain relationship with suppliers	G	improve business processes	S	manage supplies	G	implement strategic planning
G	ensure continuous preparedness for audits	G	manage budgets	G	maintain financial records	G	meet deadlines	G	manage financial risk
G	give instructions to staff	G	manage contracts	S	maintain physical condition of warehouse	S	oversee assembly operations	S	manage freight payment methods
G	handle stressful situations	S	manage inventory	S	maintain stock control systems	S	oversee production requirements	G	manage staff
G	liaise with colleagues	S	negotiate buying conditions	S	maintain warehouse database	S	plan health and safety procedures	S	minimise shipping cost
S	liaise with transportation companies	S	negotiate sales contracts	S	manage dispatch software systems		**Optional skills and competences industrial production manager**	S	perform financial risk management in international trade
S	manage dispatch software systems	S	order supplies	S	manage inventory	S	adapt production levels	G	perform multiple tasks at the same time
G	manage staff	G	strive for company growth	G	manage staff	G	analyse goal progress	G	perform risk analysis
S	manage the fleet according to planned operations	S	study sales levels of products	S	manage third-party logistics providers	S	analyse production processes for improvement	S	plan transport operations
G	*perform cost accounting activities*		**Optional skills and competences purchasing manager**	S	manage warehouse operations	S	analyse supply chain strategies	S	track shipments
G	provide operational efficiency training to employees	G	analyse consumer buying trends	S	manage warehouse organisation	S	assess supplier risks	S	track shipping sites
S	solve operational transport problems	S	assess procurement needs	S	meet productivity targets	S	check quality of products on the production line		**Optional skills and competences distribution manager**
S	work in a logistics team	G	attend trade fairs	S	monitor security procedures in warehouse operations	S	check quality of raw materials	G	ensure customer focus
	Optional skills and competences logistics and distribution manager	S	calculate purchasing levels of raw materials	S	monitor storage space	S	define manufacturing quality criteria	S	manufacture ingredients
S	check dangerous goods transport unit	G	carry out statistical forecasts	S	oversee freight-related financial documentation	G	develop business plans	S	monitor security procedures in warehouse operations
G	cooperate with colleagues	S	ensure equipment availability	S	oversee warehouse value-added activities	S	develop manufacturing policies	S	monitor stock level
S	coordinate export transportation activities	S	implement procurement of innovation	G	*perform cost accounting activities*	G	inspect material	S	oversee freight-related financial documentation
S	coordinate import transportation activities	S	implement sustainable procurement	S	plan future capacity requirements	S	schedule production	G	present reports
G	have computer literacy	G	maintain contract administration	S	plan the dispatching of products			G	speak different languages
S	identify software for warehouse management	S	manage procurement planning	S	plan the stocking of products			G	think proactively
S	improve rail service delivery	S	manage rented goods returns	S	provide staff training in warehouse management			G	train employees
S	liaise with port users	G	manage staff	G	schedule shifts			S	use a warehouse management system
S	oversee warehouse value-added activities	S	manage supplies	G	train employees				
G	show confidence	S	monitor stock level	S	use a warehouse management system				
G	use different communication channels	S	perform procurement market analysis	G	use different communication channels				
		S	promote sustainable management	S	work in a logistics team				
		G	recruit employees		**Optional skills and competences warehouse manager**				
		G	track price trends	G	act reliably				
		G	train employees	G	analyse work-related written reports				
		S	use e-procurement	S	carry out storage risk management				
				S	ensure safety conditions in storage rooms				
				G	have computer literacy				
				G	maintain updated professional knowledge				
				G	manage budgets				
				G	perform services in a flexible manner				
				G	present reports				
				G	show confidence				
				G	supervise the work of staff on different shifts				
				G	use logical reasoning				

ATTILA SZATHMÁRI

‘I WOULDN'T DO ANYTHING DIFFERENTLY ... ALTHOUGH I WON'T LET MY CHILD GO IN THAT DIRECTION’– SUCCESSFUL HUNGARIAN OLYMPIANS’ UNDERSTANDINGS AND EXPERIENCES AT THE CLOSE OF ELITE SPORT CAREERS

„NEM CSINÁLNÉK SEMMIT MÁSKÉNT… AZÉRT AZ ÉN GYEREKEM NEHOGY EBBE AZ IRÁNYBA MENJEN” – SIKERES MAGYAR OLIMPIKONOK TAPASZTALATAI, ÉLMÉNYEI A HIVATÁSOS SPORTKARRIER LEZÁRÁSÁT KÖVETŐEN

Whilst the relationship between sport-related success and its effect on the identity of athletes has been acknowledged, less attention has been paid to understanding this relationship from the perspective of the individual. Elite sport follows the logic of individualism, competitiveness, and productivity, while elite athlete performance is depicted as being a remedy for society’s ills by empowering control over health and serving as a good example for future generations. This dualism is reflected in the viewpoints of elite athletes: in their experiences, reflections, and memories. The aim of this paper is to formally examine through Hungarian elite athletes’ experiences how elite sport is related to components of the athletic identity and their potential impact on individual sustainability. Results show (1) how essential the role of coaching is in elite athletes’ careers, (2) how sport is seen as a protective shield, indicating the importance of life-long career planning, and (3) that there is cognitive dissonance regarding the identity of elite athletes.

Keywords: **elite athletes, identity, individual sustainability, phenomenology, sport**

Miközben a sportsikerek személyes identitásra gyakorolt hatása széles körben ismert, kevesebb figyelem terelődik arra, hogyan látja ezt az egyén, sportolói perspektívából. A hivatásos sport a verseny, az individualizmus és a hatékonyság logikáját követve elüzletiesedik, míg a sportolói csúcsteljesítményre gyakran a társadalmi bajok gyógyírjaként tekintünk: mert követendő példát mutat a jövő generációi számára, és felvértez egészségünk megőrzésére. Ez a kettősség tükröződik az élsportolók látásmódjában is: tapasztalataikban, reflexióikban és emlékeikben. A kutatás célja, hogy a sportolók tapasztalatain keresztül elemezze hogyan határozza meg a hivatásos sport a sportolói identitást, és annak az egyéni fenntarthatóságra gyakorolt hatását. Az eredmények azt mutatják, hogy (1) az edző szerepe kulcsfontosságú a hivatásos sportoló harmonikus karrierjéhez, (2) a sport egyfajta védőburok, ahol fontos az életre szóló karriertervezés és (3) a hivatásos sportolói identitást kognitív disszonancia jellemzi.

Kulcsszavak: **egyéni fenntarthatóság, fenomenológia, hivatásos sportoló, identitás, sport**

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Author/Szerző:
Attila Szathmári, assistant lecturer, Corvinus University of Budapest, (attila.szathmari@uni-corvinus.hu)

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A growing body of research has shown that elite athletes – i.e. those seen as successful by society – experience their careers differently as individuals. There is academic agreement that elite sport is a risky profession. The competitive logic that drives athletes to continuously aspire for high-level performance is associated with risk-taking and a disregard for health and well-being (Overbye, 2018).

This dualism has existed since elite sports became a business – a fairly recent phenomenon compared to the development of the rest of the economy, since sports professionalism and its commercialization only started within the last four decades (András, 2003; András et al., 2019; Dénes & Misovitz, 1994; Szathmári & Kocsis, 2020). The logic of elite sport is characteristic of the capitalist society that created it. Elite sport is the product of a growth-based society (Harangozó, Csutora & Kocsis, 2018; Kerekes, Marjainé & Kocsis, 2018; Kocsis, 2018), with its attendant subsystem and ideological support. Organized according to the logic of productivity, efficiency, evaluation, comparison, hierarchy, etc., elite sport reflects the conditions of society and makes its pitfalls even more visible (Liegey, Madelaine, Ondet & Veillot, 2013).

Due to its system logic and risky consequences, some sports scientists have turned to identity-related concepts to challenge this dualism and elaborate whether and how elite sport might be individually sustainable (Dohlsten, Barker-Ruchti & Lindgren, 2020). Sustainability can mean various things, and individuals may weigh different aspects of the latter concept in slightly different ways (Király et al., 2013). Researchers have claimed that it is rather complex and difficult for sport to meet the requirements of sustainability, as this would involve athletes, coaches, associations, organizers of sporting events, decision makers, representatives of the economic ecosystem, and sports-related social organizations, too – insofar as sustainability is based on long-term thinking and forward planning, and a rejection of short-term alternatives in order to achieve long-term goals (Dingle & Mallen, 2020). This means, on the one hand, promoting the ecological aspects of sustainability – making sports green –, as well as fostering economic sustainability, legacy and profitability (Preuss, 2019). Last but not least, continuity in sports in the form of youth education and career planning could be also a part of this (Bohó et al., 2015; Szathmári, 2017). Yarmoliuk (2019) differentiated between environmental, social, and economic aspects in decision-making processes concerning sports sustainability. Researchers suggest that sustainability represents "a condition or set of conditions whereby human and natural systems can continue indefinitely in a state of mutual well-being, security, and survival" (Jones, Selby & Sterling, 2010, p. 19).

While security and survival have become increasingly important topics for humankind, surprisingly few researchers have so far tried to build a concept of individual sustainability around elite sports. Lindsey (2008) defines individual sustainability as a longer-term shift in personal identity, ability, and/or attitude through development in relation to participation in sports. Loland (2006) emphasizes the relevance of human-centered perspectives and conducting elite sports in a way that can increase mutual well-being and respect. Kim et al., (2019) argue that we should create positive organizational practices to ensure the mental health of sports-related employees.

Earlier research focused on the psychological aspects of sport. In terms of the early burnout of athletes, Coakley (1992) examined whether we should talk about a social problem or individual mistakes. Finally, it has come to light that there is a flaw in social organizations, and their transformation is inevitable. Athletes' difficulty in bringing professional careers to a close has also emerged as an issue. In terms of success, Fletcher and Sarkar (2012) and Lundqvist (2011) analyzed the stress tolerance of Olympic champions in terms of individual sustainability.

While the researchers suggest that the demands and resources of careers in elite sport limit their career sustainability as elite athletes, they also reveal that a short-term career in sport does not prevent longer-term sustainability in other sphere. An increasing number of jobs/careers are becoming unsustainable due to high employer- and contextual demands, occupational stress, burnout, and lack of work-life balance (Richardson & McKenna, 2020). The physical, psychological, and emotional demands of a career in elite sport often end in burnout and chronic levels of stress and injury that lead to the end of athletes' careers (Thelwell, Weston & Greenless, 2007). This claim also supports those of other scholars who have argued that whereas some demands can be challenging, they are not inherently detrimental to work experience and to achieving short- and long-term goals and developing individual sustainability (Crawford, LePine & Rich, 2010). Richardson and McKenna (2020) argue that, although the demand for a high level of performance may limit individual sustainability in elite sport, this should not be inherently problematic and may be something that can be "managed away." However, doing so may negatively impact athletes' motivation to participate, and hence subsequent performance.

In our exposition, individual sustainability is revealed by a focus on athletes as human beings and on personal needs. These traits allude to elite sport stakeholders' interest in building trust, honor, and diversity, which elements may make elite sports more sustainable (Annerstedt & Lindgren, 2014; Barker-Ruchti, Rynne, Lee & Barker, 2014; Szathmári, 2017). Lawson (2005) meticulously researched the relationship between sustainability and elite sport and concluded that elite sport's sustainability – due to its inherent logic – is fragile. This fragility is closely connected to the identity formation of athletes. Athletes who can restructure and preserve their identities prior to finishing their athletic careers might be better able to cope with the loss of the latter than those who maintain a strong commitment to their identities as athletes until their careers end, or even subsequently. It may be that those athletes who engage in self-preservation by controlling their investment into their athletic identity are also those who can more effectively steer their career transitions (Lally, 2007).

Athletes' identities incorporate the cognitive, affective, behavioral, and social aspects associated with their

roles (Brewer, Van Raalte & Linder, 1993). "Like all role identities, an athlete's identity is developed through the process of constructing and interpreting meanings within various social interactions. In this sense, athletes use socially constructed norms, values and beliefs associated with the sporting role to help understand the world around them" (Ryan, 2018, p. 1). Thus, understanding the identity component of athletes is a vital task when investigating the experiences of athletes, and research into identity in relation to individual sustainability in elite sport may offer insight into this specific parameter (Cosh, LeCouteur, Crabb & Kettler, 2013).

While an individual's identity can consist of various dimensions, it is probable that one of these will become a dominant lens through which the others are viewed (Lally, 2007). Ideas about identity formation can thus contribute to understanding how sustainable elite sport can be expanded. Thus, the aim of this paper is to reveal athletes' needs and concerns regarding sustainable elite sport. Specifically, we aim to answer the following research question: What aspects of identity-construction influence the identities and individual sustainability of elite athletes? We try to elaborate how the sample athletes make sense of their elite sports careers, including what they see as important factors in relation to their success, and what they see as problems. In this sense, we seek to understand individual sustainability in sports as the product of the correspondence between the demands of an elite sport system and the individual athlete's personal needs and potential (Schubring & Thiel, 2014).

Materials and methods

Procedure

The purpose of our research was to understand which elements of the non-growth paradigm in sport can be nudged to make sport a more sustainable economic activity. The basis is in-depth interviews with elite athletes that were examined using interpretative phenomenological analysis (IPA). (We also created a questionnaire with 23 statements to quantitatively reveal and help understand related issues with the help of sample groups in Hungary (Szathmári & Kocsis, 2020)). IPA is a qualitative research method that is increasingly used, primarily in psychology. The basics of IPA are related to phenomenology and hermeneutics, which emphasize that individuals' experiences can only be interpreted in context. The IPA-based approach allows the researcher to view a specific experience from an "insider perspective," treating the researcher as an expert. The method seeks to identify and understand the experience as much as possible, and to understand how the person involved in the study interpreted it (Gelei, 2006; Kassai, Pintér & Rácz, 2017). The aim of IPA research is thus to explore personal, lived experiences with phenomena, such as – in our case – athletes' career experiences (Smith, 2011). Qualitative research can help with understanding customers' / consumers' experiences and evaluations of a particular service (Fett, Bruns & Lischka-Wittmann, 2009; Mitev, 2012). IPA is, therefore, an interpretative, hermeneutical method that can appear at several levels in the research process.

Participants

Targeted sampling was used. The five athletes we interviewed gave us access to a specific phenomenon that represented a "perspective" rather than a population. Following the recommendations of Smith et al. (2009), a state of homogeneity can be identified. Regarding the experiences of athletes, homogeneity should be present in the sense of the athlete's basic experiences and transitions, and the time spent on professional sporting activities. Accordingly, the main characteristics of the sample members' sporting experiences were similar in terms of individual/team sports, popularity, domestic/international success, Olympic embeddedness, supporting system, and in how much time they had been inactive at the time of the interview. During the interview lead-up process, we identified five professional athletes whose selection process we considered homogeneous according to the criteria detailed below. One of the criteria was the sport itself – namely, interviews were restricted to athletes who had competed in individual sports (e.g. swimming or athletics). This was necessary because, according to Baker, Yardley and Coté (2003), team sportsmen's experiences apparently differ in terms of the effects of success/failure, expectations, and other psychological factors.

Another important criterion is the outcome of professional careers: in terms of measurement, our athletes had been awarded national championship titles, were internationally ranked, had participated in the Olympics, and can be identified as elite athletes. Also, the role of the time-horizon was considered an important criterion: we included athletes whose professional careers had finished some years ago, but who had formerly competed for more than a decade, so they had a reasonable distance from and some insight into this phase of their lives. The former professional athletes had not entirely ended their sport-related activities; in some form, they were still connected with the system. Based on their own experiences, Larkin, Eatough and Osborn (2011) suggest using a sample of three to six people. This is suitable for describing similarities and differences between individual cases.

Sample selection was based on Miles and Huberman's (1994) classification that employs intensity-based criteria and comparable sampling techniques. The essence of the former is investigating information-rich cases. The research question is always open, is focused on exploration (not explanation), on process (not result), and aims at reporting (not identifying causes or consequences). The research question should also involve a special context (not, for example, a comparison of contexts). At the beginning of the research, we formulated a two-level research question (a first-level research question was followed by a second-level research question that could be theoretically grounded) (Somogyi et al., 2018). Our main research question was "What aspects of identity-construction influence the identities and individual sustainability of elite athletes?"

Contact was based on pre-established relationships. This ensured that all the above-mentioned "intensity criteria" were met. Interviews were documented in a friendly environment known to the athletes. This prior contact ensured an open and frank atmosphere, and increased the chance that subjects could boldly express themselves.

Data collection

We implemented a semi-structured interview with each participant. Semi-structured interviews were used because the method permits the researcher's questions to guide the interview process while simultaneously allowing topics identified by the participants to be elaborated upon via probing (Rubin & Rubin, 2012). Furthermore, with the use of non-numerical data this line of research helps explore and describe the "quality" and "nature" of how people behave, experience, and understand, and thus helps link people's actions to their beliefs (Brown, 2005). A semi-structured interview process was applied that incorporated the results of former questionnaire survey. Inquiring about the phenomenon we wanted to investigate (including experiences of injury, failure, or success) during the interviews allowed the identity of the interviewees to be evaluated in the context of the given experience.

Interviews were documented in 2015, each lasting between 60 and 90 minutes. Prior to these, participants were oriented about the object of the research and gave their informed consent. Recordings were made which were later destroyed. Documentation were transcribed and major nuncupative elements were labelled (such as chuckling and meaningful silences) and noted down.

Data analysis

In perusing the interview transcripts – so-called immersion in the data – the researcher "takes on the interviewee's viewpoint" (Pietkiewicz & Smith, 2014) and makes the transcript better through analysing, explaining, interpreting and conceptualizing using free content analysis (Smith, Flowers & Larkin, 2009). Conceptual commentary is "torn" from the direct text and is utilized to originate an understanding of the person on a more holistic level. It is characterized by the entire dialogue: the "dialogue" between the preliminary knowledge of the researcher, and an ongoing understanding of the interviewee's experiences.

The next step was the creation of emerging themes (Pietkiewicz & Smith, 2014) by exploring all the interviews from a different perspective to that of the participants. In this, more emphasis was placed on the researcher's organizing and interpretative role. While creating a "new body" of outcomes, the themes continuously develop. A topic may become an emerging issue when it arises in at least half of the interviews (Smith, Flowers & Larkin, 2009), and these topics should be written down in the transcript. In implementing this method, the researcher can incorporate psychological constructs into the process of interpretation.

Results

In the following sections, we explore the narrative types associated with identity construction through the selection of the latter experiences. Comparing the situation of athletes in sport to the situation with the environment, and examining the boundaries thereof, we must then look at what is socially desirable. Efficiency gains in the short term – or performance-related results in Hungarian sports – may not support human individual sustainability in the long term. In addition to physical and psychological factors, sport is also part of the human environment.

Coding of the first interview indicated that emotional affection was emphasized – athletes talked about coaches, parents, and age groups using several motifs ("desire," "love," "shield") that were analogous to the terms used in a relationship. Mention of these relationships occurred frequently in all interviews, so they may be considered distinct topics. Experience related to the attitude to training and fierce competition was also crucial (Figure 1).

Thereafter, we sought to identify the connections (such as chronological links) between the emerging themes and those overarching topics that could cover several subtopics. By using quotes from the interview transcripts and trying to reveal the patterns and groups of topics among the interviews, further interpretation of unfolding themes – called "master themes" – can be developed (Smith,

Figure 1.

Exploratory themes that emerged during the coding process

PARENTS' ROLE	DESIRE	MENTAL/PHYSICAL HEALTH
you are your own person	sport as love	always pain
there is no fight	coaching for love --> crazy	coach physical --> psychologist mental
familiy pressure --> study	easier way vs. learning	enormous load --> hit back
TRAINING	**COACHES' ROLE**	**ABROAD**
monotonous, hideous	luck, responsibility	horizon
playfulness <---> get results	no private life - after own's head	scholarships
no training --> still success	no killing-noticed-was built up	money, better facilities
COMPETITION	**VISION**	**AGE GROUP RELATION**
injustice	sport as protective cover	trust only yourself <--> society
happiness	closed world: grime ---> cleaner, easier	embarassing not to study
eternal pain	black hole, vacuum	marriage, children later
	IDENTITY: WHO HAVE I BECOME?	
	never give up	
	tomorrow will be better	
	start at the bottom	
	role model, positive personality traits	

Source: own compilation

Flowers & Larkin, 2009). During the analysis, the researcher interprets how the interviewee has interpreted their experience; this dual interpretation is a process of "double interpretation" wherein the second, scientifically and systematically performed interpretative work of the researcher can be considered a part of the reflective phenomenological attitude of IPA – as opposed to interviewees "naturally adjusted" pre-reflective observations, using Husserl's expressions (Smith et al., 2009).

Primary and secondary themes

a. The "central role of coaching": Closely associated with other emerging themes (parents, training, competition, and desire). The role of coaches (as part of a supporting system) is remarkable in terms of the original discovery of the athletes ("*seeing something in me"*), managing them properly ("*not killing me"*) and long-term planning ("*built up"*). We identified motifs associated with long-term planning (athlete-coach-sport), athletes who face "*burn-out,"* and other factors. "I was lucky with my coach as he did not burn me out in the drive to be successful; I was systematically built up to be good."

Figure 2.

Primary and secondary themes identified and unfolded during the IPA process

Role of coaching		Protective cover		Social connectedness	
Gains	Lack of...	Age-group	Problems	Cognitive dissonance	Child-like values
Appreciation, relationship, coach, emotions, love	Concept, working system, lifelong program, human focus, appreciation, long-term perspective	Privileges, comparison, exit, integration, otherness	Mentality, health, age group, human relationships, transition	Belief, values	Motif, playfulness
It was the expectation of the [trainers at the] swimming pool that educational studies would continue.	*...these days people - who do something terrible, worthless - gets into the focus of society.'*	*'Those of my age group got married earlier and had babies earlier. There is no healthy golden mean, only extremes.'*	*Ask anyone at the top! Sport is not healthy anymore.'*	*'I wouldn't do anything differently ... although I won't let my child go in that direction.'*	*'[Participating in the] Sydney [Olympics] was like taking a kid to the amusement park.'*
...results must be produced at all cost for coaches so that they can prove their existence.'	*To offer alternatives and not to let go of one's hands when they quit.'*	*Everyone loves athletes. Especially if you are successful. In life, you can never normally do something that everyone unconditionally accepts and loves.'*	*I can understand the people who - it will sound rude - jump out the window to finish their participation in athletics or any sport.'*	*After retirement, it was complicated for me, and it was a severe problem that time was running out of my hands, days and hours, deadlines of all kinds.'*	*Little ones should be playful. This is the biggest mistake in relation to performance constraints.'*
...he did not burn me out in the drive to be successful; I was systematically built up to be good.'	*'Only the very crazy stay there for that minimal amount of money, doing it with love.'*	*'I went around the world because of my running and jumping.'*	*It was a space: a vacuum and I felt that I couldn't find my place in my age group.'*	*I think the most serious problem is that an athlete counts as long as he/she is active.'*	*...hold hands for a few years and be by her side as she becomes independent and switches over to everyday life.'*

Source: own compilation

The indicative identity of athletes was constructed within a performance-based narrative plot. By exploring the identity-construction aspects of elite athletes in the re-readings and rearrangements of the text, stories emerged around three unfolding themes: the *(a)* "*central role of coaching"* during the careers of elite athletes; elite sport reflected as a *(b)* "*protective cover"*; and *(c)* "*social connectedness"* related to identity development (Figure 2).

The coaches' role emerged as vital in shaping the athlete's identity and creating the chance for an individually harmonious career: "I think the most serious problem is that an athlete counts as long as they are active. While an athlete is in this phase of their life, they should be prepared for the next period." A lack of the elements of long-term planning, a human-centered approach, and a life-long program may be components of an elite sport system, and a missing part of the individual athlete's

personal needs, and have potentially negative effects on individual sustainability:

> …results must be produced at all costs for coaches, so that they can prove their worth, and, as a result, a child can be burned out or unmotivated by the age of 15. Little ones should be playful. This is the biggest mistake in relation to performance constraints.

b. "*Protective cover"*: The role of contradictions, such as the comparison of the internal / external world and active / formerly active athletes, is essential in identity construction. "Everyone loves athletes. Especially if you are successful. In life, you can never normally do something that everyone unconditionally accepts and loves." An individual's identity can consist of various dimensions, while the existence of a "protective cover" is identified as a dominant lens through which "the outside world" is viewed. Sport is like a small world surrounded by a protective sheath that separates and protects athletes, yet making it extremely difficult to quit. A "*closed world"* that "*itself is dirty, but still simpler, cleaner (!) and not as infected as the outside world."* Age as a sub-theme also forms the basis of continuous comparison in relation to social status, becoming a substantial part of subjective social self-image.

> I have a very tight agenda as an athlete, so my days are tied to a schedule. After retirement, it was complicated for me, and it was a severe problem that time was running out of my hands, days and hours, deadlines of all kinds. At that time, I was much more disciplined, plus at our pool it was crazy not to learn well.

Constant comparison was also related to raising awareness about what sport ("*worldview"* sub-theme) could give athletes in return. A "*black hole"* or "*vacuum"* may arise after emerging from under the protective cover of a life in sports. Athletes who can restructure and preserve their identities prior to finishing their athletic careers might be better able to cope with such losses. Accordingly, restructuring and preserving their identities prior to finishing their athletic careers might help them to cope with the experience of loss:

> I can understand people who – this will sound rude – jump out of the window to finish their participation in athletics or any sport. Well, it is a very, very terrible feeling. I have not gotten that far, thank God, but maybe because I am a tougher breed. But it has also occurred to me, I've thought: 'what the hell I am looking for in this world? I am not good at anything!' And from this point on, you feel useless, there is none of the confirmation you get from sport, and you cannot find it anywhere else, because to find it... you have worked 150% so far, and now there is a world in which every normal person who has been with you for 15 years has already taken these steps.

Here, security is considered key in terms of to what extent it is available to athletes. Personal security comes under threat during transition periods (starting and finishing a career, turning professional etc.) so a systematic approach that can protect oneself becomes essential.

Continuing in education, thereby increasing the chance of developing a dual career, was an expectation of parents which later became standard at sports clubs, but was not part of long-term planning:

> It was the expectation of the [trainers at the] swimming pool that educational studies would continue. They knew that a lot of parents would take their children out if they did not learn well, so it was in the pool's interest that they studied. And the two don't rule each other out.

c. "Social connectedness": This is represented by the motif of a child and can be found in all three stakeholders (athlete, parent, coach). Two of the interviewees work as coaches, all of them have children, and all made statements not only about their athletic- but also their coaching and parental identity.

> A positive personality can be acquired from doing sport and they [athletes] can carry these [this latter attitude] with them throughout their lives and it will be useful everywhere. But I am not going to force my children to pursue sport, like my parents did not want me to be a top athlete. I do not want to obstruct them either, because I know you can play a positive role in society through sport.

Principles that emerged included "*never give up,"* "*tomorrow will be better,"* and "*start at the bottom."*

> I think the veteran World Championships show how much power they [athletes] have. If you use this [power] skilfully and well, you can pass on things that you may not have known about before. Certain values that a person acquires when he or she becomes a role model.

As a trainer, playfulness is emphasized as a focal point of identity construction, but as a retired, successful elite athlete and parent cognitive dissonance appears: the foremost desire is for children not to choose the path of becoming an elite athlete.

In other words, these stories indicated that very few resources were available for bridging the athletic identity with a desirable future identity to manage identity construction. "I would not do anything differently. I am grateful to my mom and my family for making this decision, for persevering, and for finally accepting my decision. Although I wouldn't let my child go in that direction." The latter quote is an indication that the desired balance between short- and long-term interests (essential for individual sustainability) in Hungarian elite sport has been severed.

Discussion

The purpose of this study was to investigate i) the identity formation of elite athletes through experiences in sport, and ii) how to facilitate the development of a harmonic, individually sustainable sporting career. While the performance narrative was referred to as the prevailing storyline available for identity construction, results revealed three higher-order themes that are critical elements of the identity construction strategy (i.e., the central role of coaching, protective cover, and social connectedness; see Figure 2). For the individuals in the present study, their collective sporting experiences were mostly positive, such that all perceived that would do the same again. However, in line with the claims of Howells and Fletcher (2015), cognitive dissonance appeared when athletes revealed that they hope that their child will not follow their path. The understanding of identity construction elements presented here (i.e., security and social connectedness) complement pre-existing work (Szathmári & Kocsis, 2020) about the connection between sport and individual sustainability. With pressure mounting on athletes to make the most of their athletic "investment," the temptation for them to compromise their future by exploiting their bodies for short-term gain and by cheating is growing (Barker et al., 2011), so a well-balanced life based on "The Joy of Effort" is essential (Loland, 2012).

The results reported in this research also extend previous work by positioning the mental and physical health issues produced by environmental and psychological factors. (Coyle, Gorczynski & Gibson, 2017). Elite athletes have a broadly comparable level of susceptibility to high-prevalence mental disorders (such as anxiety and depression) as the general population (Rice et al., 2016; Nicholls & Levy, 2016; Vveinhardt, Fominiene & Andriukaitiene, 2019). Elite sport can cause health problems: psychological and physical pressure (Levy, Polman, Nicholls & Marchant, 2009), and a lack of long-term planning represent the focal areas that contradict the principles of sustainability. The elements described here (e.g. coaching) complement pre-existing work on the structure and function of social connections. For example, the fact that coaches functioned as externally situated helpers (Chatfield & Hallam, 2015), and provide long-term planning and impartial advice to athletes, is consistent with Clutterbuck's (2001) conceptualization of the mentor/coach (Sandardos & Chambers, 2019). Moreover, parent-child mutual disclosure and the sharing of emotions contributed to personal and relational growth (Brown, Webb, Robinson & Cotgreave, 2019). Applying IPA to the interviews, we extended Rynne and Mallett's (2014) study to find that sustainable practices were present but not guaranteed in the coach-athlete relationship development. This finding in part supports the relation to sport coaching. The humanistic approach is one that is person-centred and emphasizes the empowerment of the individual in relation to achieving personal goals in ways that respect the athlete as an emotional, political, social, spiritual, and cultural being (Cassidy, Jones & Potrac, 2004; Lyle, 2002; Potrac, Brewer, Jones, Armour & Hoff, 2000). Achieving sustainability and organise human activities in a sustainable manner has become a task and an objective that we as humans must achieve partly by creating structures and new ontology that move individual behaviour in the desired direction (Heikkurinen, Rinkinen, Järvensivu, Wilén & Ruuska, 2016; Kocsis, 2018).

Congruent with this research, previous studies have reported that transition periods (especially retiring) are of particular importance in relation to athletes' careers. Practical remedies (e.g., providing proactive support) and coaching are well-acknowledged instruments for supporting athletes with the transition phase (Hallman, Breuer, Ilgner & Rossi, 2019; Park, 2012). The concept of sustainable sport is consistent with theoretical findings: athletic identity at the time of retirement exhibits a significant relationship with coping processes, emotional and social adjustment, pre-retirement planning, and anxiety about career decision-making (Grove et al., 2008). Interestingly, it appears that retirement may play an essential role in the evolution of experiences due to the associated distancing from events (cf. Coakley, 1983).

According to the athletes, their coaches were essential points of contact during their careers. They played a significant role in maintaining the identity of athletes and the individual sustainability of the whole system. Chambers (2017) also reflects in an analysis of Australian professional sports that one of the higher-order themes related to players' mental health concerns the player-development manager relationship. The expression of this shortage has parallels in the appearance of problems at a more general social level. A lack the elements of long-term planning, a human-centred approach, and a lifelong program all harm individual sustainability.

Offer (2006) claims that real individual sustainability means finding the right balance between short-term enjoyment and long-term security. Here, security is considered vital in terms of how much it is available to the athletes. As described, sport is a "protective cover" for participants. The analysis revealed that some of the positive outcomes were indicative of illusions regarding personal growth (Howells & Fletcher, 2015). The findings of this study also showed that a dual career is a real long-term identity-creation option, although as Stambulova, Engström, Franck, Linnér, and Lindahl (2015) state, maintaining a constant and equal focus on both sports and studies may compromise athletes' private life, health, and well-being. Educating athletes who just start their elite sport career on how to making way for the positive values they represent (Kovacs & Doczi, 2020) and helping them access multiple dual-career role models would help them to envisage more diverse identity narratives and directives about how to steer the task of combining elite sport with education (Ronkainen, Ryba & Selänne, 2019).

Limitations

The study applied retrospective interviews; as such, it may have been hard for participants to recall various experiences and how these influenced their overall sense of identity.

The research is also limited because it was only feasible to prepare a single interview with each participant, which may not have been adequate in this investigation of a complex experience. The responses of the athlete participants, who were mainly male, may not reflect those of the broader sporting elite and related environment. Their inclusion may limit the generalizability of the findings; collecting additional information from other sportspeople, including a more equal gender distribution, would strengthen the knowledge base.

Conclusion and directions for future research

There is no firm hypothesis in the literature or well-grounded theory about the individual sustainability of athletes in elite sport. Therefore, this research was not intended to justify or refute theories. Rather, the exploration of the comments and experiences of the participants about different topics help to expand the main topic. As there is little information available in this field, the approach we adopted is particularly suitable: we can base our hypotheses on the experiences of those who are involved in it. Accordingly, the participants were athletes, who, through their speech created the literature for analysis. The physiognomy of the study does not require the formulation of an assumption, but it does specifically address the research questions. The main question in our research plan was the following: what aspects of identity construction influence the identities and individual sustainability of elite athletes? The study findings indicate that coaches and the athletes' supporting system should help increase athletes' individual sustainability, insofar as athletes themselves lack the related know-how. The stakeholders in elite sport should anticipate demand from athletes in relation to implementing sustainability principles and perspectives.

The analysis shows that there is cognitive dissonance regarding the identities of elite athletes. This emphasizes that coaching, the "protective cover" and "social connectedness" (in the form of life-long career planning) should play an important role in moving elite athletes' lives in a more individually sustainable direction.

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FELHÍVÁS PUBLIKÁCIÓK BENYÚJTÁSÁRA A VEZETÉSTUDOMÁNY CÍMŰ FOLYÓIRAT *„TUDOMÁNYMETRIA - TÉNYEK ÉS TRENDEK A TÁRSADALOMTUDOMÁNYOK TERÜLETÉN"* CÍMŰ KÜLÖNSZÁMÁBA

Vendégszerkesztő(k) neve(i):

– Prof. Dr. Bakacsi Gyula (BGE)
– Prof. Dr. Dobos Imre (BME)
– Dr. habil Sasvári Péter László (NKE)

A lapszám tervezett elméleti-módszertani keretének, tartalmának leírása:

A nemzetközi versenyképesség napjaink egyre integráltabb és nemzetközi kapcsolatokon alapuló politikai berendezkedésében elsődleges prioritássá vált az országok számára. Macilwain (2010) munkájában megállapította, hogy a tudományhoz, technológiához és innovációhoz kötődő tevékenységeknek direkt hatásuk van a társadalmi és gazdasági jólétre, valamint a fenntartható fejlődést is elősegítik.

Számos nemzetközi folyamat határozza meg a nemzetközi tudományos közösség sikerképletét és prioritásait. Mivel az információs társadalom technológiai fejlődése és adatbázisai lehetőséget biztosítanak az adatgyűjtésre, az átalakuló tudományos szakpolitikák legújabb és legjelentősebb változása, hogy egyre inkább a tudományos kiválóságon alapulnak. A tudományos kiválóság fogalmára eddig nem született egységes definíció, minden állam saját értékeinek és érdekeinek figyelembevételével határozza azt meg. A nemzetközi egyetemi rangsorok megjelenésével a kutatói kiválóság különböző formái kerültek előtérbe. A legtöbb régió esetében jelentős tudományos teljesítménybeli növekedés látható az utóbbi években, mely közegben a középeurópai országoknak is lépést szükséges tartaniuk. A pályázati modellek értékelési kritériumai nagyban meghatározzák mind a szerzők egyéni szintjét, mind a kutatóműhelyek intézményi szintjét a kutatott témák, a publikációs teljesítmények, valamint a kialakult kutatói együttműködések, hálózatok tudományos teljesítménye megítélésében is. A tematikus lapszám célja feltárni ezeket a nemzetközi kontextusba illeszkedő, de elsősorban a hazánkat és a régiónkat érintő folyamatokat.

A tudománypolitika és tudományszervezés napjaink egyik kiemelt társadalomtudományi témája mind tudományos, mind szakmai tekintetben. Érdemes azt kiemelnünk, hogy a tudománymetria – éppen a dinamikusan változó tudománypolitikai környezet miatt –, Magyarországon is egyre inkább előtérbe kerülő kutatási terület. Multi- és transzdiszciplináris elemei következtében a társadalomtudományok különböző tudományágait szólítja meg, egyaránt kapcsolódik a gazdaságtudományokhoz, állam- és jogtudományokhoz, valamint a szociológiához is. A tervezett lapszámba empirikus kutatáson alapuló és review jellegű tanulmányokat is várunk. A lapszám célja, hogy a Magyar Tudományos Akadémia és a magyar tudományos közösség egészét szolgálva a jelenlegi helyzet kritikai elemzésén túlmutatóan tudományszervezési és tudománypolitikai kérdésekre adandó válaszokhoz kínáljon tudományos igényű megalapozást.

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INNOVATÍV TECHNOLÓGIÁK MARKETINGKIHÍVÁSAI ÉS LEHETŐSÉGEI

A különszám szerkesztői

Keszey Tamara, Budapesti Corvinus Egyetem (E-mail: tamara.keszey@uni-corvinus.hu)
Prónay Szabolcs, Szegedi Tudományegyetem (E-mail: pronay.szabolcs@eco.u-szeged.hu)
Szücs Krisztinán, Pécsi Tudományegyetem (E-mail: szucsk@ktk.pte.hu)

A kéziratok beküldési határideje

2021 október 1; várható megjelenés: 2022 április

Az elmúlt évtizedben felgyorsult technológiai fejlődés és digitalizáció új lehetőségeket teremtett a vállalatok számára, hogy vevőiket, fogyasztóikat jobban megismerhessék, új csatornákon szolgálják ki őket. A változások azonban korábban nem látható marketingkihívásokat is a felszínre hoztak (Borgulya & Kovács, 2020). Rövidülnek például a termékéletciklusok, sok fogyasztó nem fogadja el, vagy épp ellenáll az új technológiáknak (Keszey & Zsukk, 2017), illetve kiber-bűnözők lopják el a vállalatoktól vevőik adatait. Az említett kihívások és lehetőségek hátterében álló technológiák sokrétűek. A teljesség igénye nélkül ide sorolhatók a vállalat és vevő/fogyasztó kapcsolatát átalakító technológiák (pl. önkiszolgáló technológiák (Kenesei & Cserdi, 2018) és egyéb kiskereskedelmi digitális innovációk (Simay & Gáti, 2018; Agárdi et al., 2020), telemedicina, távoktatási rendszerek, radikális innovációk (pl. önvezető autók (Kézy et al., 2018)), illetve ezek létrejöttét lehetővé tévő technológiák (pl. mesterséges intelligencia, felhőalapú szolgáltatások (Füzes, 2018), valamint a vevők jobb megismerését lehetővé tévő technológiák (pl. big data, neuromarketing (Lázár & Szűcs, 2020)).

A különszám célja, hogy bátorítsa azokat a kutatásokat, amelyek különféle innovatív technológiák marketingcélú felhasználását, vagy marketingszempontból releváns aspektusait vizsgálják és előmozdítsa a párbeszédet a témakör iránt érdeklődő magyar nyelvű kutatók között.

A különszámunkban az alábbi témákra fókuszáló, illetve itt fel nem sorolt, de a felhívás témaköréhez kapcsolódó egyéb témákban várunk kéziratokat:

- Milyen hatások alakítják (újonnan) az innovációk fogyasztói/felhasználói elfogadását?
- Milyen termékfejlesztési, kommunikációs megoldások segítik a sikeres piaci bevezetést a digitalizáció korában?
- Hogyan, milyen újszerű módszerekkel ismerhető meg napjaink fogyasztóinak/vevőinek valós igénye?
- Van-e különbség termék- és szolgáltatásinnovációk elfogadásában?
- A vállalatoknak milyen képességeket kell kialakítaniuk ahhoz, hogy a big data-ban rejlő lehetőségeket ki tudják aknázni?

Különszámunkban módszertani megkötéssel nem élünk, empirikus kutatásokat, elméletalkotó és a szakirodalom áttekintését célzó tanulmányokat egyaránt várunk. A beküldött cikkek meg kell, hogy feleljenek a Vezetéstudomány formai és akadémiai követelményeinek, minden beküldött cikk a folyóirat standardjainak megfelelően kettős vak bíráláton megy keresztül.

Bármilyen felmerülő kérdés esetén örömmel állnak rendelkezésre a különszám szerkesztői.

Felhasznált irodalom:

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FELHÍVÁS PUBLIKÁCIÓK BENYÚJTÁSÁRA A VEZETÉSTUDOMÁNY CÍMŰ FOLYÓIRAT *„JÁTÉK, JÁTÉKOSSÁG ÉS JÁTÉKOSÍTÁS INTERDISZCIPLINÁRIS MEGKÖZELÍTÉSEI ÜZLETI KÖRNYEZETBEN”* CÍMŰ KÜLÖNSZÁMÁBA

A játék olyan interdiszciplináris téma, amely egyre inkább átszövi az ületi élet különböző területeit (flow elmélet, szervezetfejlesztés, üzleti szimulációk stb.). Kortárs kutatók olyan meghatározó elméletekkel hozzák szoros összefüggésbe a játék és a játékosság fogalmakat, mint a változás, a szervezeti tanulás, vagy a kreativitás és innováció. A téma messze túlmutat a 2010-es évektől a tudományosan is népszerűvé váló ún. gamifikáció (játékosítás) elvein, amelynek fókuszában elsősorban a digitalizált játékosított folyamatok állnak. Nemzetközi színtéren a különböző tudományterületeken (menedzsment, marketing, kommunikáció, pedagógia) gyorsan növekszik a játékról szóló publikációk száma, magyar nyelven azonban hiánypótlóként születik meg a Vezetéstudomány témának dedikált lapszáma.

A különszám célja, hogy tudományos játékra szólítsa fel különböző diszciplínák témához értő kutatóit, valamint összehozza az üzleti élet szempontjából releváns, játékkal és játékossággal kapcsolatos kutatásokat. Olyan játékosokat várunk, akik bátran belefognak az elméleti és módszertani labdázgatásba, valamint gondolataik és eredményeik üveggyöngyeit szívesen gurítják az olvasók elé.

Kiindulásként az alábbi témalabdákat szeretnénk feldobni:

– a játék integrálhatóságának lehetőségei a különféle munkafolyamatokba,
– szervezeti folyamatok újraértelmezhetősége a játék és a játékosság segítségével,
– döntéshozatali folyamatok és játék,
– játékos fogyasztók, elfogyasztott játékok,
– játékosság a különféle diszciplinákban,
– játékosítás és ami utána van.

A benyújtott publikációkat a Vezetéstudomány hivatalos bírálati folyamatán keresztül értékeljük és választjuk ki megjelenésre. A játékszabályoknak megfelelően az elkészült kéziratoknak legkevesebb 6000 szót kell tartalmazniuk, és nem haladhatják meg a 9000 szót.

Időzítés:
Kéziratok beérkezése: 2022. február 1-ig.
A kéziratok várható zárása: 2022. november 10.
Várható megjelenés: 2022. december.

Mitev Ariel és Tóth Rita
Vendégszerkesztők
2020.05.05.

A LEGJOBB TANULMÁNYÉRT JÁRÓ DÍJ A DÍJ ODAÍTÉLÉSÉNEK SZEMPONTJAI

A Vezetéstudomány folyóirat szerkesztősége 2017-től kezdődően díjazza az adott évfolyamban megjelent legjobb cikkeket. A jelölteket egyrészt a Szerkesztőbizottság tagjai és a tematikus számok vendégszerkesztői terjesztik elő; másrészt a cikkek tudományos és társadalmi hatását jelző letöltési statisztikák alapján automatikusan is jelölünk cikkeket. A tárgyalt téma innovativitását, a kutatásmódszertan megbízhatóságát és kreativitását, illetve a tanulmányok tudományos színvonalát mérlegelve a díjazottakról a szerkesztőbizottság dönt.

A díj odaítélésekor a megjelent cikkeket a következő szempontok alapján értékeli a szerkesztőség:

- népszerűség, olvasottság: hányan töltik le, illetve olvassák a cikket a megjelenését követő egy éven belül,
- innovatív téma: a cikk által feldolgozott téma mennyire újszerű, mennyire jelenik meg a nemzetközi szakmai diskurzus fókuszterületei között, illetve milyen mértékben mozdítja előre a hazai szakirodalmat,
- módszertani megalapozottság: a cikket megelőző empirikus vagy szakirodalmi kutatás módszertana mennyire illeszkedik a cikk témájához, az alkalmazott módszertan bemutatása kellő reflektáltsággal történik-e,
- a feldolgozott szakirodalom minősége: a cikkben feldolgozott szakirodalom mennyire friss, mennyiben származik a hazai és nemzetközi szakmai diskurzus élvonalát jelentő folyóiratokból, a szerző milyen alapossággal dolgozza fel e forrásokat,
- gyakorlati és elméleti relevancia: a cikk eredményeit mennyiben tudja hasznosítani a tudományos közösség, vagy a vezetői és tanácsadói praxis,
- beágyazottság a magyar nyelvű szakirodalmi diskurzusba: a cikk milyen mértékben épít korábbi magyar nyelven megjelent kutatási eredményekre, mennyire kapcsolódik más hazai szerzők munkáihoz.

Díjnyertes tanulmányok és szerzők – 2019

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