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FROM THE EDITORIAL COMMITTEE

We are giving you the next 31th 4 (2024) issue of the Scientific Journal of the Faculty of Management at the Rzeszow University of Technology entitled “Humanities and Social Sciences”.

The aim of the Publisher is to raise the merits and the international position of the quarterly published by the Faculty of Management, that is why we are still developing the cooperation with foreign team of reviewers, as well as an international Scientific Council. The Editors have also attempted to apply for international databases; currently the quarterly HSS is indexed in **Index Copernicus Journal Master List, The Central European Journal of Social Sciences and Humanities (CEJSH) ERIH PLUS, DOAJ and EBSCO**.

The Journal has been also included in the list of projects qualified for funding under the **“Support for scientific magazines program”**.

The articles published in this publication are devoted to the broader issues of the humanities and social sciences. They are the result both of theoretical and empirical research. The subjects covered vary considerably and reflect the interdisciplinary nature of the Journal. We do hope that the papers published will meet your kind interest and will be an inspiration to further research and fruitful discussions.

On behalf of the Editorial Board of “Humanities and Social Sciences” we would like to thank the Authors for sending the outcomes of their research. We would like to express particular gratitude to the Reviewers for their valuable feedback that greatly contributed to increasing values of the scientific publications.

With compliments
Editorial Committee

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Abimbola A. AKANNI¹
Choja A. ODUARAN²

ENHANCING WORKPLACE SAFETY BEHAVIOUR THROUGH SAFETY CULTURE AMONG BREWERY WORKERS: THE MEDIATING ROLE OF WORK-LIFE BALANCE

Past studies have established the association between safety culture and workplace behavior, yet the possible effect of work-life balance on this association has not been explored. This study investigates the mediating effect of work-life balance in the link between safety culture and workplace safety behavior among brewery workers. A sample of 250 ($F = 36.2\%$; mean age = 24.94, $SD = 4.96$) brewery workers responded to three scales viz: Safety Culture Scale (SCS), Work-Life Balance Scale (W-LBS), and Workplace Safety Behaviour Scale (WSBS). Correlational analyses showed that safety culture was negatively related to work-life balance but positively related to workplace safety behavior among brewery workers. From the mediation analyses, safety culture and work-life balance independently predicted workplace safety behavior while work-life balance had an indirect effect on the association between safety culture and workplace safety behavior. The study concludes that efforts at sustaining safety culture that supports employees' capacity to attain work-life balance may enhance the safety behavior of brewery workers.

Keywords: Brewery workers, safety culture, work-life balance, workplace safety behaviour.

1. INTRODUCTION

Brewery workers are often exposed to hazardous work environment which might pose significant challenges to their health, wellbeing and that of the organisation at large. Reported cases of injuries and accidents due to unsafe behaviour threatens workers' health (Harsini et al., 2020). Employees' ability to engage in appropriate workplace safety behaviour is inevitably required to reduce increasing spate of accidents and injuries. Workplace safety behaviour, which is a preventive behaviour carried out to avert negative consequences, are engaged either overtly or covertly, under certain situations, in order to forestall feared consequences (Salkovskis, 1991). These outcomes may be detrimental to organisational growth and costly to the organisations as the United Nations Global

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Compact (2022) estimated that 2.78 million workers die every year through occupational accidents and illnesses. This interprets to have implication on the affected organisation's budget and manpower. Previous studies have identified factors as risk perception, safety training and leadership styles as predictors of safety behaviour (Hamidah, 2019; Baraei et al., 2022). Incidentally, studies on safety behaviour among brewery workers are still scanty within the context of Nigeria. Available studies on safety behaviour at work among employees within the context of Nigeria have concentrated on workers in the oil and gas, banking and construction ((Ehiaguina, Moda, 2020; Akanni et al., 2021; Afuye et al., 2022; Zailani et al., 2022) sectors of the economy. Therefore, this current study investigates the relationship between safety culture and workplace safety behaviour through work-life balance among brewery workers.

2. LITERATURE REVIEW

2.1. Safety culture and workplace safety behaviour

Safety culture is described as organisational beliefs, attitudes, values, and norms that defines appropriate conduct, danger, and risk of hazardous operations which are shared among workers (Cooper, 2000). These shared values and norms, according to Vinodkumar, Bhasi (2010; 2011) are comprised in safety rules, regulations and procedures for high-risk industry that have been found to relate to safety behaviour. The development of safety culture has positive implications for employees need satisfaction and improved safety performance (Bautista-Bernal et al., 2024). Similarly, Al-Bayati (2021) argues that safety culture characterizes the activities of top management team which contributes to safety behaviour. In other words, leadership style plays important role in safety culture and subsequently workplace safety behaviour. Equally, productivity has been reported to be on the increase when employees adhere to safety rules, regulations and procedures (Windapo, Oladapo, 2012). Few previous related studies confirmed that safety culture predict safety behaviour and performance (Asamani, 2020; Ehiaguina, Moda, 2020; Bautista-Bernal et al., 2024). However, failure to adhere to safety measures by stakeholders in any organisation could lead to preventable accidents and injuries which may consequently increase the costs of production as well as affect the profit margin of the company (Olatubi, M.I., Olatubi, V.I., 2017). However, leadership pattern has been reported to boost safety behaviour in the workplace (Hamidah, 2019). Grounded on the aforementioned positions in literature, we therefore, hypothesized that:

***Hypothesis 1:** Safety culture will significantly predict safety behaviour.*

2.2. Work-life balance and workplace safety behaviour

Work-family balance describes an attainment of equilibrium between work demands and other life role expectations. Scholars have continued to affirm that both employees and organisations profit from successful achievement of balance between work and life roles (Hammer et al., 2005; Greenhaus, Powell, 2006). Previous studies have established an association between work-life balance and perceived health and safety of workers, mental health as well as safety behaviour (Chan, 2020; Kotera et al., 2020; Al-Bayati, 2021). Employees with good work and life balance are likely to encounter less injury rates compared to those with poor work-life balance (An et al., 2020). In the Nigerian banking sector, Okeya et al. (2020) established a substantial association between work-life balance and employees' health and well-being. Also, employees who achieves adequate balance between work and life demands will experience lower personal burnout at work (Schwartz

et al., 2018). We therefore, propose that employees who accomplish an equilibrium between work and life roles will engage more in safety behaviour at workplace. Thus, it is hypothesized that:

Hypothesis 2: *work-life balance will significantly predict safety behaviour.*

2.3. Mediating effect of work-life balance

We posit that safety culture will influence brewery workers' safety behaviour through work-life balance. A culturally safe workplace strengthens the employees' capacity to engage safety behaviour as well efficient service delivery (Windapo et al., 2012; Al-Bayati, 2021; Bautista-Bernal et al., 2024). It is evidence of managerial priority for safety performances (Al-Bayati, 2021). Also, work-life balance and safety culture were reported to be related (Schwartz et al., 2018; Nwagbara, 2020). Factors such as fatigue, inadequate staff strength, meagre remuneration, deficient safety training, indifference, and high-risk tolerance have been adjudged to impede safety behaviour (Efiok et al., 2015).

Although, previous studies have not covered the indirect effect of work-life balance in the association between safety culture and safety behaviour, its mediating effects on several behavioural outcomes at the workplace have been explored. For instance, it was reported that the association between work-family conflict and life satisfaction (Tasdenlen-Karckay, 2017), job engagement and intention to quit (Jaharuddin, Zainol, 2019), conditions of work and employee engagement (Dinh, 2020), job resources and job satisfaction (Rashmi, Kataria, 2021), self-identified leadership and perception of leadership (Tran et al., 2021) as well as employee intention to stay (Samroodh et al., 2023) were mediated by work-life balance. These findings have established the cushioning impacts of work-life balance in strengthening positive behavioural outcomes and dampen unpleasant behaviour at workplace. We therefore hypothesized that:

Hypothesis 3: *work-life balance will significantly mediate the association between safety culture and safety behaviour.*

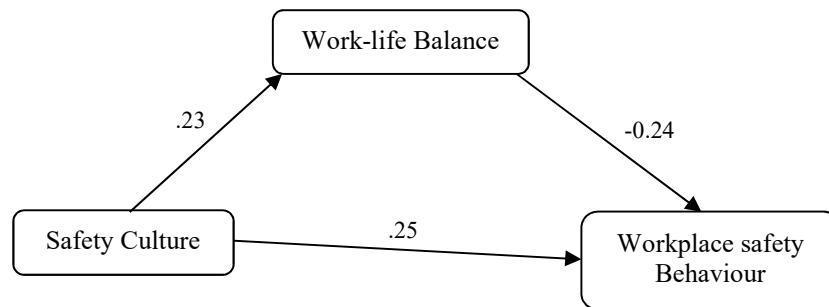


Figure 1. The Study hypothesized Model

Source: own study based on data collected from participants.

3. METHODOLOGY

3.1. Participants and procedure

Necessary approvals to conduct this study were secured from appropriate Institutional Review Board and authorities. Data were sourced from employees of a brewery company. The rationale for the study was explained to the participants and those who thereafter gave

their consent took part in the study. The convenience sampling technique was adopted in sample selection by virtue of availability and willingness to participate in the study. The participants were ensured of confidentiality and anonymity of their responses as well as voluntary withdrawal of their participation from the study. Questionnaire administration was conducted during break time at the site of the study. Participants who requested to go with the questionnaire and return the following day were allowed to do so. Out of the 280 copies of the questionnaire that were distributed only 250 (F=36.2%; mean age = 24.94, SD= 4.96) copies were found useable.

3.2. Measures

Workplace safety behaviour: Brewery workers' safety behaviour was assessed using the 8-items questionnaire by Vinodkumar and Bhasi (2010). The scale was developed to measure safety compliance and participation components of safety behaviour at workplace. The response pattern ranged from 1 = strongly disagree through to 5 = strongly agree. The sum total of the responses was generated to indicate participant's safety behaviour. The Cronbach alpha coefficient for this study was .87.

Safety culture: Information on safety culture was accessed through the safety culture scale developed by Jon and Erick (2009). It has 13 items with the response format that ranges from 1 (strongly disagree) to 5 (strongly agree). Responses generated were added together to arrive at a global safety culture scores for the respondents. The Cronbach internal consistency of $\alpha = .75$ was reported for the current study.

Work-life balance: The 4-items Work-Life Balance scale developed by Brough and Timms (2009) was utilized to assess information on the Brewery workers capacity to balance work and life roles. A global work-life balance scores was generated by summing the responses from the respondents. The Cronbach internal consistency of .65 was recorded for the current study.

3.3. Results

Data that were generated for the study were analysed using the Pearson Product Moment Correlation (PPMC) and Hayes PROCESS Macro analytical tools. An initial data examination were conducted to check for the normality of the data via the establishment of the skewness and kurtosis (see Table 1). Specifically, the PPMC was used to examine the intercorrelation among the study variables. Hayes PROCESS Macro Model 4 was utilized to conduct the direct and indirect effects analyses.

Table 1. Correlational matrix with mean and standard deviation

Variables	Mean	SD	1	2	3	4
1.Age	24.94	4.96	1			
2.Safety Culture	50.68	6.97	-.27**	1		
3 Work-Life Balance	13.66	2.23	.16*	-.20**	1	
4 Workplace Safety Behaviour	31.95	4.14	-.36**	.42**	-.22**	1
Kurtosis	-	-	-	.77	.30	.90
Skewness	-	-	-	.52	.46	.93

Source: own study based on data collected from participants.

From Table 1, results showed that age of employees had a significantly negative association with safety culture ($r = -.27, p < 0.05$) and workplace safety behaviour ($r = -.36, p < 0.05$) but positively significantly associated with work-life balance ($r = .36, p < 0.01$). Also, safety culture had a significantly negative association with work-life balance ($r = -.20, p < 0.05$) but moderately positive with workplace safety behaviour ($r = .42, p < 0.05$). The link between work-life balance and workplace safety behaviour was significantly negative ($r = -.22, p < 0.05$). This suggests that efforts at balancing work and family roles may hamper the capacity to meet the standard workplace safety behaviour expectation among brewery workers.

3.4. The mediation analysis

Results on table 2 revealed a statistically significant total safety culture effect on workplace safety behaviour ($\beta = 0.25, SE = .04, p < .001$) and a significant direct effect of safety culture ($\beta = 0.23, SE = .04, p < .001$) and work-life balance ($\beta = - 0.24, SE = .11, p < .001$) on workplace safety behaviour. These results showed that safety culture and work-life balance independently predicted workplace safety behaviour. Also, the standardized indirect effect of work-life balance in the association between safety culture and workplace safety behaviour was significant ($\beta = 0.03, SE = .01, 95\% CI = [0 .005, .056]$). The overall amount of the total effect was 42%.

Table 2. Mediating effect of work-life balance in the safety culture – workplace safety behaviour link

Predictors	Consequent Factors												
	Mediator Model			Dependent Variable Model									
				Total effect			Direct effect			Mediating effect I.E (95% Boot C.I)			
Variables	β	SE	p	β	SE	P	β	SE	P	β	SE	LL	UL
Constant	17.00	1.03	0.001	19.27	1.78	0.001	23.32	2.57	.001	-		-	
SC	-.07	.02	0.001	.25	.04	0.001	.23	.04	.001	-		-	-
WLB	-	-	-	-	-	-	-.24	.11	.031	.03	.013	.005	.056
	F(1,242)=10.48, p<.001 R=.20, R ² =.04			F(1,242)=52.18, p<.001 R=.42, R ² =.18			F(2,241)=28.84, p<.005 R=.43, R ² =.19						

Note: I.E = Indirect effect, C.I = Confidence Interval, Boot = Bootstrapping, SC = Safety Culture; WLB =Work-Life Balance.

Source: own study based on data collected from participants.

4. DISCUSSION

This current paper examined the relationship between safety culture and workplace safety behaviour and investigated the mediating effect of work-life balance in the association between safety culture and workplace safety behaviour among brewery workers. All the three hypotheses that were formulated for the study were confirmed.

We found that safety culture predicted workplace safety behaviour among brewery workers. This suggests that shared organisational beliefs, values and norms that is reflected in proper conduct help employees to comport themselves in safe manners at work. Past studies have confirmed an association between safety culture and safety behaviour (Asamani, 2020; Ehiaguina et al., 2020) and other outcomes such as increased productivity (Windapo et al., 2012; Asamani, 2020; Ehiaguina et al., 2020; Al-Bayati, 2021; Bautista-Bernal et al., 2024). Company policies and management team of brewery companies emphasizes safety rules and its enforcement among stakeholders. This may be responsible for the findings of the current study.

Similarly, work-life balance was also established to predict of workplace safety behaviour. Capacity to achieve an equilibrium between work and life demands could have implications for safety behaviour at work. Past studies have reported that work-life balance, perceived health and safety of workers were related (Chan, 2020; Okeya et al., 2020) as well as other related concerns as mental health (Kotera et al., 2020) and safety behaviour (Al-Bayati, 2021). Employees with good work-life balance experience less injury rates compared to those with poor work-life balance who commit more errors on the job (An, et al., 2020). Furthermore, our findings confirmed the indirect effect of work-life balance in the association between safety culture and workplace safety behaviour among brewery workers. This is in agreement to prior studies (Jaharuddin et al., 2019; Rashmi et al., 2021; Samroodh et al., 2023) which have reported that work-life indirectly mediated the link among various workplace behavioural outcomes such as work engagement, intention to stay, job satisfaction among others. This implies that employees who are able to balance work and life demands may find it easier to adjust to safety culture that facilitate workplace safety behaviours among brewery workers.

The study recommends that employees should be exposed to more training on safety culture and practices periodically. This will enable them to be adept at safety expectations in their workplaces and emerging issues on safety practices. Similarly, policies that support work-life balance should be projected more in other to facilitate better balance and safety. Workers, particularly those on shift schedules, should constantly have access to the company's policies on work-life balance. This knowledge and access could assist them in planning programmes to strenghten their family and liesure engagements.

The study has a number of limitations. There is need for caution in generalizing the findings of this study to other Food, Beverages and Tobacco Industries as only workers in Breweries were sampled. Thus, further studies may be needed to be conducted in other firms within the Food, Beverages and Tobacco Industries and other companies for expanded coverage. Longitudinal study and mixed methods approach may even enhance the robustness of data on safety behaviour among employees in Food, Beverages and Tobacco companies in Nigeria.

In conclusion, safety culture plays significant roles in brewery workers' workplace safety behaviours. This is based on the fact that the study validated the hypothesis that safety culture will predict workplace safety behaviours. The current study advances the broad body of knowledge not only by buttressing the role of safety culture in predicting workplace safety behaviour was possible via work-life balance. Thus, a preliminary study to establish a mediating effect of work-life balance in the link between safety culture and workplace safety behaviour, especially among brewery workers.

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LIBERTARIAN PREMISES OF KNOWLEDGE COMMERCIALIZATION IN HIGHER EDUCATION INSTITUTIONS

Academic freedom is part of the multi-faceted discourse on liberty. Enabling universities to fulfill their core mission of advancing knowledge is a fundamental element of pursuing academic freedom. The purpose of this article is to analyze the issue of academic freedom, including the conditions and processes involved in conducting research and accomplishing the objectives of higher education. Key factors in the process of knowledge production and commercialization include historical background, perception of independence paradigms, adopted university management models, and the size and structure of funding. Among the crucial premises for the commercialization of knowledge in higher education are the sense of community within the academic environment and accumulated past funding (related to the "Matthew Effect").

Keywords: knowledge commercialization, freedom, higher education.

1. INTRODUCTION

The 21st century presents an enormous challenge to developing economies (to which Poland belongs) as their socio-economic systems have been undergoing intense transformation. The rapid pace of change is most evident in the service sector and high-tech industries. Another cycle of Schumpeterian "creative destruction" is becoming increasingly apparent. The overall scope of these changes also impacts the structure of higher education sector, knowledge creation and commercialisation, but also the role of higher education in the global transformations.

What has become a "catalyst" for these transformations is knowledge, accelerating with the increasing globalisation of the world's economy. Economies have become more open, and greater competition has necessitated higher levels of innovation. At the same time, a number of political and economic transformations in the worldwide economy caused by

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conflicts or climate change, are driving the need to reconstruct the approach to the role of knowledge. This is most evident in the increasing role of the state, both in the financing of innovations and in determining their directions and scope. The most important actors in the processes of knowledge production and diffusion are universities. Their mode and nature of activity is also changing dynamically.

Importantly, the traditional model of higher education institutions, focused on teaching and scientific research, has been vastly expanded to include elements linked to economic processes. This expansion aims to secure significant financial resources that would supplement budgetary allocations.

Interestingly, while the core mission and nature of these institutions remain unchanged, there is a shift in the expectations of students and potential business partners. The survival of universities will thus depend not only on achieving their primary objectives but also on their effectiveness in integrating more commercial solutions. Either the first or the second process must involve liberty of research.

The purpose of this article is to analyse the issue of academic freedom, including the conditions and processes involved in conducting research and accomplishing objectives in higher education. The article is based on a review of the relevant literature, OECD databases, Scimago Institutions Rankings, and Academic Freedom Indicators. The analysis includes a historical perspective on academic freedom.

2. THE ESSENCE OF FREEDOM

Freedom is a multidimensional category. It can be considered from various perspectives, including philosophical, legal, social, political, and economic dimensions. Consequently, the concept of freedom can be examined across various domains of knowledge, such as philosophy, law, political science, and economics. Greek philosophers were among the first to explore this concept. Later, scholars from other disciplines also reflected on it. The notion of freedom has significantly evolved since ancient times.

From a historical perspective, the ambiguity of the concept of “freedom” has led to disputes and the emergence of various viewpoints. For instance, some argue that a truly free individual is one who, guided by genuine knowledge and their own reason, can pursue goals they consider desirable for themselves (Socrates, Aristotle). Other approaches to freedom claim that: it is an inherent right of human beings (Thomas Hobbes); it is a product of cultural, legal, and institutional evolution (Charles Louis Montesquieu); it has a negative character and is defined as the absence of constraints (Thomas Hobbes); it has a positive nature and enables the pursuit of rational goals (Georg Wilhelm Friedrich Hegel); it primarily belongs to the individual and is expressed through their liberties (Benjamin Constant); it should be granted to collectives and serve as a measure of sovereignty (Jean-Jacques Rousseau). Apart from the broad philosophical understanding of freedom, it can also be related to more contemporary categories that emphasise the need to eliminate coercion in the spheres of: morality and religion (John Locke), economics (Adam Smith), and politics and customs (John Stuart Mill) (Przybyła, 2016).

An interesting approach to freedom is presented by Isaiah Berlin, who distinguishes between two concepts of freedom (Berlin, 1994): “negative freedom” and “positive freedom”. Then, he consistently defends the first one as the only one that can be implemented in the “real world”, in which there are constant conflicts of interests, highly differentiated conceptions of the good and competing human actions. “Negative freedom” is liberty from: interference in private matters, which in turn requires that the power of the

state be limited by a strong legal system. “Positive freedom”, on the other hand, is the freedom to: realise the greater good in history.

To this day, however, a consensus on how to perceive freedom has not been achieved⁴. Nicolas Grimaldi, among others, writes about this, pointing to the ambiguity and even the lack of clarity surrounding interpretations of the concepts of freedom (Grimaldi, 2007). It appears that there exist not only different “theories of freedom”, but also various methodologies for “constructing” these theories, which significantly impact their ultimate form and substantial content (Barwicka-Tylek, 2009).

It is important to understand, as pointed out by Benjamin Constant, that in antiquity, freedom did not mean the same as it does in modern times (and at present). The freedom of the ancient era encompassed everything that ensured citizens a significant role in exercising social power. During that period, philosophers were the only group of people that demanded a certain kind of individual independence. However, the independence of philosophers did not by any means resemble the individual freedom to which contemporary society aspires. Their independence consisted in the ability to renounce all worldly joys and emotions. Independence of modern people is important because it provides them with pleasures and accommodates emotions. Apparently, the progress of humanity resembles the development of an individual. The freedom that has been developing since the onset of modern times is what guarantees citizens independence. The ancients, in keeping with their disposition, primarily sought action, and this need for action was well-aligned with a substantial degree of social power. In contrast, modern individuals seek peace and the pleasures of life – benefits of personal independence – and for them, freedom consists in the guarantees ensured by institutions (Constant, 1980; 1992).

Institutions are the ‘rules of the game’ that establish structures by means of which people have historically created an order that has allowed them to reduce the uncertainty associated with economic activity (North, 2002). It is also important to note that institutions represent a historically shaped collection of stable principles, manifested in traditions, customs, or laws. Their role is to implement and enforce patterns of behaviour that govern social relations (Ménard, 1995).

In the institutions thus defined, certain rules of freedom are embedded within which modern societies operate: 1) freedom of action, provided that it is harmless or neutral; 2) freedom of opinion, which entails that individuals should enjoy the right to hold and express their opinions, whether personal or public, as long as this freedom does not lead to harmful behaviour; 3) freedom to manage one’s property and to practice one’s profession without infringing upon the rights of others who have the same freedoms (Constant, 1980).

J.S. Mill presented a very interesting approach to the role of freedom. He described it as follows:

In politics, freedom guarantees true democracy; in public debate, it is the guarantee of truth; in the life of an person, it is the condition for the emergence of genuine individuality; in social life, it serves as a criterion that characterises the least conflictual mores and customs; in the sphere of morality, it acts as a safeguard against coercion and anarchy (Mill, 2005).

⁴ Ch. Montesquieu wrote that there was no other word to which more varied meanings were attributed and which appealed to people in so many different ways (Montesquieu, 1957).

As a society, we yearn for freedom because we have learned to expect it to facilitate the achievement of many of our objectives. Precisely because every individual knows so little and, in particular, because we rarely know which of us knows best that we trust the independent and competitive efforts of many to induce the emergence of what we shall want when we see it (Hayek, 2006). It seems that academic freedom is just such a category.

3. DETERMINANTS OF ACADEMIC FREEDOM

The concepts of “academic freedom” and “freedom of speech” have long been subjects of numerous debates. They are often used interchangeably, at times combined under the term intellectual freedom. Academic freedom has evolved from the 12th–14th century to the contemporary understanding of freedom as scientific inquiry, independent thinking, and the choice of fields of study (Savvina, 2020). In its widely accepted meaning, academic freedom encompasses publishing, research, and teaching activities. Enabling universities to fulfil their fundamental function of developing knowledge should constitute the essence of academic freedom (Evans, Stone, Roberts, 2020).

Based on jurisprudence, the scope of a scholar’s academic freedom relies on broad paradigms of independence, including economic, institutional, social, and professional independence. Therefore, for the paradigm of independence to be realised, the following conditions must be present (Butler, Mulgan, 2013):

- Freedom of research – absence of economic (financial) pressures that dictate research in a specific, predetermined direction. The possibility to accomplish goals through an unbiased quest for truth.
- Institutional independence – universities should provide environments conducive to creativity, experimentation, and knowledge transfer. Institutions ought not to impose methods, syllabuses, research scopes, or ways of disseminating research outcomes, although they can oversee adherence to fundamental standards;
- Ability to conduct research contrary to popular sentiment and social consensus;
- Occurrence of valuable “curiosity-driven” or “blue-sky” research, which are the cornerstones of knowledge advancement.

At the same time, certain limitations should be noted. Academic freedom involves the independence of exploring ideas and concepts by an individual in the capacity of a member of the academic community. It follows that individual independence and credibility should be based on academic qualifications (Barrow, 2009). Academic freedom is also constrained by Cartesian rationalism and the Western modes of thought (Lynch, Iwanczewska, 2016).

The perceptions of academic freedom vary depending on the university model. These models have evolved from traditional ways of knowledge creation, through entrepreneurial and relational ones, to systems involved in generating regional innovation.

The strength of an academic institution can be classified according to the type of its adopted strategy. Therefore, universities can be categorised as research-oriented – Humboldt/Oxbridge and *Ivy-leagues* (Harvard, Stanford, Princeton, etc.); entrepreneurial – MIT and Regionally-based universities (Warwick), and regional ones, such as the land-grant colleges in the USA or specialised training institutions in Europe (Pinheiro, 2012).

One of the management styles employed by universities is the traditional model proposed by Wilhelm von Humboldt. In this model, higher education institutions, striving to achieve academic excellence, engage in research activities based on the freedom to pursue them, which is a fundamental principle of academic life. This approach ensures that

universities maintain a strong academic core with relatively weak connections to the commercial processes.

There are four important reasons for which academic research is not susceptible to commercial imperatives. First, there is uncertainty regarding the utility and applicability of knowledge generated through basic research. Second, new insights often fail to impress experts initially. For instance, the first presentation of Darwin's theory of evolution did not leave a lasting impression on the group of scientist gathered at the Linnean Society meeting in London. Third, scientific solutions do not address contemporary questions or business needs, instead providing solutions to problems that are disconnected from collaborative partnerships. Fourth, funding criteria and the expected research outcomes present a barrier. Institutions that fund the majority of basic research use strictly formalised criteria that can impede the implementation of projects by new (smaller and less experienced) research institutions. Moreover, satisfactory results of research projects are typically measured by scientific publications or patents which often do not correspond to commercial needs.

In the early 1980s, the idea emerged of academic institutions actively participating in regional development. The concept involved building a strategy to incorporate the characteristics of an entrepreneurial university (as proposed by B. Clark and initially exemplified by MIT), while also seeking solutions for knowledge-based organisations. Based on educational, research and service-related linkages, universities are oriented towards partnership and user engagement, in line with the matrix proposed by Donald Stokes, known as Pasteur's Quadrant. According to Stokes, investment in research should be inspired by practical applications, because then it brings the greatest social benefits. This approach entails the highest chances of commercialisation; however, challenges such as securing funding and ensuring the attractiveness of innovation support continue to pose significant barriers.

Institutional and political traditions shape the strategies for higher education funding. The Humboldtian tradition of academic self-government emphasises the freedom of universities from external influence, despite these institutions being subject to stringent administrative regulations. The Napoleonic tradition involves a greater role of the state in the organisation and management of universities. In contrast, a distinctly Confucian model of higher education has developed in Singapore and East Asia (Marginson, 2010). Today, there is a noticeable convergence in political approaches to the funding of educational systems, with most of them being hybrids of these archetypal patterns.

Universities are evolving towards an academic entrepreneurship model that integrates science, education, innovative and research activity with commercialisation (Utanova et al., 2021). For university research to lead to commercialisation, it is necessary to expand the function of academic staff from purely academic researchers to that of founders and managers of enterprises (Qian et al., 2018). Efforts by academic researchers aimed at commercialisation can be divided into three case studies:

- The licensing process – universities participate in research and development as well as in the generation of intellectual property;
- The process of creating companies by universities – employees transition from academic research to founding enterprises but do not oversee subsequent commercialisation;
- The academic entrepreneurship model – the scholar has a dual identity, that of a researcher and an entrepreneur.

In a study by Chalmers University of Technology, a practical implication was proposed that universities should acknowledge alternative modes of academic research commercialisation instead of transforming reluctant researchers into entrepreneurs (Bergren, 2017). This suggests that creating spin-off companies is more advisable than the process of licensing and the dual role of the academic researcher-entrepreneur.

Higher education institutions in English-speaking countries typically operate with considerable autonomy. This stems partly from the distribution of funding sources. European universities are predominantly funded from public sources, whereas in British and American systems of higher education, it is private sources that dominate. In 2020, the highest proportion of expenditure on higher education from private sources was recorded in Great Britain, Columbia, Japan, Australia, USA, Chile, and Korea. At the same time, when examining the structure of funding in the context of the Q1 and Q4 results of the SCIMAGO ranking, no evident impact of the type of funding source on the evaluation of universities can be noticed (see Figure 1).

Furthermore, the opinions of researchers regarding the influence of private funding on academic freedom are divided. On the one hand, more intense co-operation of universities with the business sphere boosts the likelihood of commercial success. On the other hand, it can pose a threat to the impartiality and independence of research (Hugentobler, Müller and Morrissey, 2017). Unfortunately, such risks are rarely taken into consideration within policy frameworks, including quality assurance systems and higher education laws (ENQA et al., 2015).

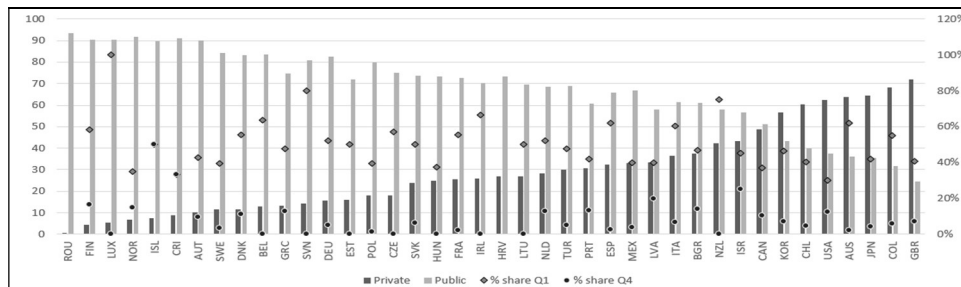


Figure 1. Expenditure on higher education and position in the SCIMAGO ranking in OECD, 2020 or latest available

Source: prepared on the basis of (OECD, 2024) and (Scimago Institutions Rankings, 2024).

Funding systems that rely on increased government support often result in substitution effects and exacerbate problems related to weak co-operation for commercialisation. This phenomenon has been observed in Chinese universities, although it varies depending on the specific university model. What is more, a common feature of a significant number of developing and highly developed countries is the unwillingness of academic employees to collaborate with businesses. This reluctance is caused by evaluation systems that are strongly oriented towards academic achievement (Wang et al., 2020). Universities which produce high-quality research and maintain lasting relationships with the industry sector also generate more inventions. This alone, however, is not enough to make them innovators. The accumulation of past funding has a bearing on the quality of academic research, and state funding is insufficient to close the development gap (Miyata, 2000). Revenues from licences are modest in relation to the research budgets of universities.

Instead of confining their activities to achieving rapid commercialisation results, such as license revenues, inventions, or patents, entrepreneurial universities ought to strive for long-term development through co-operation with industry and clusters.

The Academic Freedom Index (AFI) is a measure that allows for analysis of the aspect under discussion. It is based on five indicators: freedom of academic exchange and dissemination, freedom to research and teach, institutional autonomy, campus integrity, and freedom of academic and cultural expression (Kinzelbach et al., 2023). The global dynamics of individual factors affecting academic freedom are quite similar (see Figure 2). From a historical perspective, the Second World War saw a significantly sharper decrease in the level of freedom compared to the First World War. Between the early 1960s and the mid-1970s, all indicators showed a gradual downward trend. This decline was probably associated with the policies of the Soviet Union, military dictatorships in Latin America, as well as pressures of the Cold War on academic communities. From the 1980s onwards, a substantial improvement in the indicators took place, which accelerated in the 1990s, along with the wave of democratisation and digitalisation. Since that time, academic freedom has stabilised at a relatively high level. Relatively, the highest level of academic freedom is observed in the area of academic research, closely followed by the freedom to do research and teach. Institutional autonomy has been slightly more inert compared to the other factors, and since the 1990s, it has levelled off at the lowest standard. The reason for its lower dynamics is the slow pace of institutional processes. The freedom of expression for academic staff has been the most sensitive to political changes and evolution over time (Spannagel, Kinzelbach, 2023).

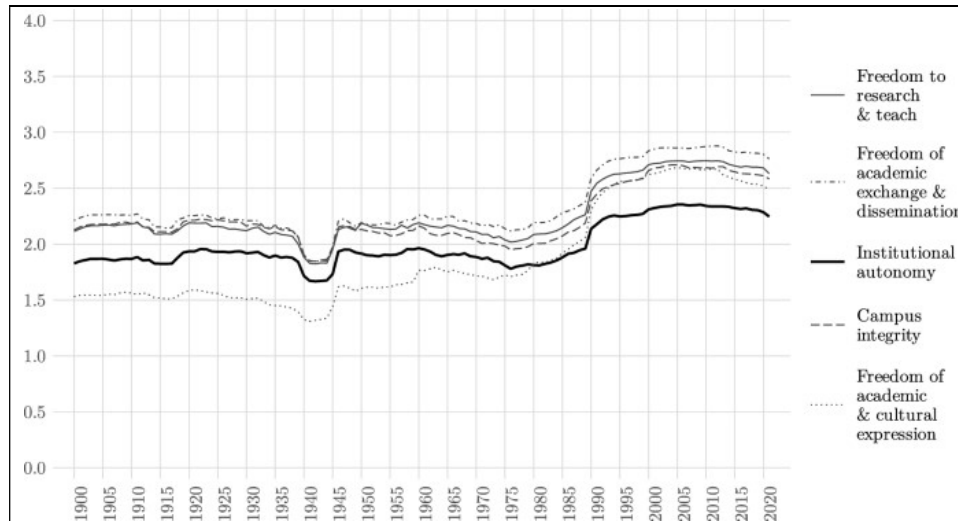


Figure 2. Global Patterns in Academic Freedom Indicators, 1900–2021

Source: (Spannagel, Kinzelbach, 2023).

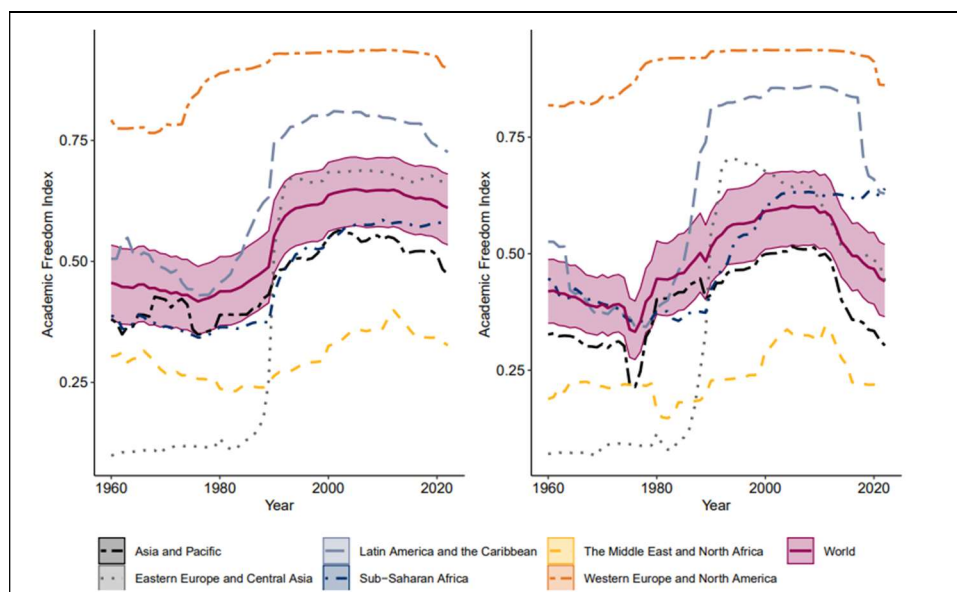


Figure 3. Average global and regional academic freedom indexes from 1960 to 2022

Source: (Kinzelbach et al., 2023).

Considering the national averages, a decline in the level of academic freedom worldwide has been recorded since around the year 2007. The regions most affected by these decreases include: the Middle East and North Africa, Latin America and the Caribbean, as well as Asia and the Pacific. Far more pronounced is the average decline in freedom weighted by population (see the right graph in Figure 3), where all countries (excluding Sub-Saharan Africa) experienced significant drops in the level of freedom (Kinzelbach et al., 2023). It can be noticed that in 2022, an average global citizen experienced academic freedom comparable to those of four decades earlier. The regions with the relatively highest and most stable levels of academic freedom are located in Eastern Europe and North America.

In summary, the assessment of academic freedom depends on a variety of historical factors, the perception of individual paradigms of independence, the adopted university management models, the evaluation of the outcomes of academic activity, the motives and durability of co-operation with the business sector, as well as past and current funding. In many OECD countries, there is a trend towards reducing the role of the state and increasing the autonomy of higher education. Control is exercised through evaluation of results in the areas of education, research, and economic impact. The efficiency of universities is influenced by factors that determine the streams of private, public, and philanthropic funding.

4. CONSEQUENCES OF RESEARCH AND SCIENCE COMMERCIALISATION

A utilitarian justification for academic freedom is the pursuit of knowledge and the enhancement of the value of skilled workers, regardless of immediate outcomes. According to traditional models, the academic environment has never been profit-oriented or driven

by commercial imperatives. It has always been the *raison d'être* of scientists as well as a key element in the advancement of knowledge and the development of society (Butler, Mulgan, 2013).

The preservation of academic freedom within an economic context gives rise to tensions arising from privatisation, instrumentalisation, and commercialisation of knowledge. Traditionally, academic research has served the public good. Admittedly, many ideas have not been commercially exploited due to a lack of high-risk capital; however, freedom from the pressure to achieve short-term goals facilitates research. Conversely, the patenting of products or procedures by other institutions can have a negative impact on the development of academic inquiry (Evans, 2011).

Postmodernism, as a new approach to thinking and viewing higher education in the context of commercialisation, had led to a number of changes, including (Vakhovskiy, Babichev, Ivchenko, 2022):

- A shift in the status and mission of universities – the massification of higher education through increasing its accessibility and lowering the quality of education;
- A change in the status of knowledge – knowledge is increasingly perceived as a commodity, which enforces generation of utilitarian knowledge;
- Evolution of educational strategies – the commercial educational market is developing;
- Emergence of subordinate universities – under conditions of limited funding, today's universities are not autonomous but dependent on the state of the business sector;
- Teaching and research in academia are focused on creating educational and scientific products;
- The transformation of the student-teacher relationship into an egalitarian dialogue;
- Prioritising research that provides immediate benefits (such as applied research and developmental projects).

Contemporary universities are moving away from autonomy and academic freedom. This is part of a broader social crisis, as highlighted by W. Roepke. The rise of an increasingly collectivist state contributes to widespread social massification, which provides a foundation for more radical forms of democracy (Röpke, 1942). This represents a far-reaching consequence of the gradual decline of Western civilisation, manifesting in nihilism, lack of authority, modern cultural trends, and growing secularisation. Social massification, combined with an ultra-democratic system, devoid of liberal and authoritarian safeguards, can lead to radical forms of intolerance and despotism.

Roepke indicates several by-products of massification. First of all, language undergoes a transformation, adopting short, catchy soundbites and other simplistic, sometimes barely comprehensible forms. This is accompanied by a distortion of many concepts, leading to confusion in social discourse. Both language and communication become increasingly primitive. The trend towards proletarianisation of the masses has become evident not only on science, but also in art and culture. At the same time, the value system on which interpersonal relations were based has been eroding, resulting in modifications of the entire economic and social system. As a consequence, there is a deepening spiritual degradation, with means of expression and decision-making mechanisms increasingly centred around emotionalism and the sexualisation of life. Society has become reliant on agnosticism and relativism, which further exacerbates communication challenges.

Restrictions on academic freedom are linked to the creation of modern man, which causes various implications significant from the perspective of a personal freedom. Firstly,

there is a sense of existential emptiness, a longing for integration and closeness, and consequently a quest for ‘narcotics’ (such as radio, television, cinema, mass movements, ideologies, world-improving schemes, fashions, mass sports, peculiarities, messianism), which leads to even greater dependency and a search for security, fundamentally associated with the state. Conversely, there is a marked dissolving of the sense of individualism and personal responsibility (Gasset, 2004).

The expectation of security from the state is somewhat surprising, given that it is very closely associated with increasingly greater control and totalitarianism. Secondly, the so-called “public of industrial agglomerations” has emerged, reflecting the escalating relativism of our times. This phenomenon leads to a lack of critical assessment of certain attitudes and intolerance towards others, creating an atmosphere of self-censorship. Thirdly, we are witnessing a “cult of the colossal”, characterised by a transformation of state interventionism towards socialism or, as some authors suggest, towards a form of feudalism (Kotkin, 2020).

The issues outlined above can be seen as foundational elements of an ideal totalitarian state, whose essential feature is meticulous control over the population. Paradoxically, this process leads to a situation where coercion becomes unnecessary since most people willingly embrace a servile existence.

Restrictions on academic freedom also impact the utilisation of knowledge. Today, information is used far more frequently, but often without thorough examination or verification. Simultaneously, there are no conditions for improving how knowledge is applied. The concept of “industrial freedom”, which in the 19th century facilitated the direct transfers of academic knowledge to companies and the economy, no longer exists. Without it, the benefits of technological applications do not translate into reduced costs, decreased resource consumption, or increased public welfare. We live in an era of applications, when companies need entrepreneurs, engineers, and production managers. Therefore, economies with greater economic freedom and higher entrepreneurship levels are likely to reap more significant benefits from technological development.

Importantly, artificial intelligence will not change this as deep learning – on which it is based – is useful for tasks such as disease recognition, autonomous driving, or translation, but not for creating innovative scientific or research solutions. The shift from discoveries to applications leads to a lack of innovative approaches to research issues, while also reinforcing the greatest asset of the free market: bold entrepreneurs.

In the process of social and economic development, the goals and capabilities of higher education institutions play a crucial role. Currently, universities are characterised by a tendency towards conformity, aligning themselves with immediate demands. As institutions of long standing, today’s universities struggle to connect their past with their future. University education is moving towards practical applications, leading to a focus on novelty and fragmentation of knowledge. This raises a fundamental question: What should be done with education? Education that is often based on superficial erudition, contributory scholarship, textbook knowledge, narrow specialisation, and technocratic attitudes.

Concepts of contemporary universities have been based on commercialisation, ideologisation, and politicisation, often mixed with elements of infantilism and celebrity culture. They are morphing into modern corporations, or centres of business specialisation. This shift is evidenced by the emergence of environments driven by evaluation-based competition (mainly for grants) and the imperative to publish at any cost. The result is a proliferation of publications that are rarely read, and over time, this trend diverts young

talents from intellectual pursuits (such as reading, writing, or lecturing) towards quasi-business activities, including evaluation and application for grants. The race for points and grants should be replaced by a return to the spirit of open discussion, disinterestedness, and a broader, more communal collaboration (Nowak, 2014).

Currently, universities are systematically undermining the instinct for academic freedom “tour court”, while creating conditions for trading this freedom for material goods. To halt this process, it is essential to reconsider several issues, stimulate curiosity, broaden existential horizons, develop intellectual and emotional intelligence, and engage more deeply in culture. It is necessary to eliminate obedient and habitual thinking, weaken the influence of newspapers and the internet, and reject seemingly convenient solutions (Nowak, 2023). And above all, it is crucial to seek the truth since science relies on scepticism and suspicion. In every instance, one should not strive for consensus but rather challenge axioms (Popper, 2002).

5. CONCLUSIONS

As Jerzy Wilkin argued,

the strength and durability of universities stem, among other things, from the fact that they combine being large and generally efficient organisations with numerous traditions and social values. Universities are multi-functional institutions, and the roles which they play have are crucial for the sustainability and development of societies. The activities of modern universities, which include conducting research that expands the boundaries of science and providing high-quality education, have become very costly. To be able to afford this, these important institutions must be co-financed from both public and private funds (Wilkin, 2020).

The sense of community within the academic environment is central to fulfilling a university’s mission. This community is rooted in specific values and principles governing the functioning of universities as unique and inherently elite institutions (Wilkin, 2020).

As Albert Einstein once remarked, ‘To raise new questions, new possibilities, to regard old problems from a new angle, requires creative imagination and marks real advance in science’. Achieving this is possible through broadly understood academic freedom, which constitutes the foundation for the effective operation of universities. Freedom, as a vital value in contemporary society, should serve as a basis for universities to fulfil the essential tasks of higher education: the acquisition and dissemination of knowledge grounded in truth.

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ORGANIZATIONAL CLIMATE AND CULTURE IN POLISH ADMINISTRATION SYSTEM: THEORETICAL AND PRACTICAL CONSIDERATIONS

This article explains organizational climate and organizational culture and presents a brief history of research. The role of national culture in understanding organizational culture and climate is explained through a specific focus on the system of Polish administration. The paper presents both theoretical literature and empirical research in the field of Polish organizational culture and climate with due respect to dysfunctions. Recommendations are made for additional thinking and research. The purpose of the study is to discover the perception of the organizational climate in the Polish system of administration from the opinions of civil servants and address this perception with the scientific literature that reveals how the Polish administration institutions possess an organizational climate and culture flawed by anti-efficiency and pathological phenomena. The results of the research indicate that despite the disconnect between the more negative image of organizational climate presented in the literature and the opinions expressed by the surveyed civil servants, large improvements are necessary to make the climate more efficient according to the latest Western standards.

Keywords: system of administration, civil servants, organizational culture, organizational climate, Rosenstiel and Boegel questionnaire.

1. INTRODUCTION

Scientific writings on Polish organizational culture underline problems inherited from communism. From formal point of view Poland adopted the best Western legal and organizational standards to join the European Union. In spite of this, the basic traits of the organizational culture of Polish bureaucracy inherited from communism are still discernible in Polish system of administration. As a result, anti-efficiency organizational cultures are allegedly a common phenomenon in Polish administration offices. In this

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respect, the existing problems include for example the treatment of the citizen as a petitioner, corruption, abuse of power, nepotism, bureaucratic organizational structures and hierarchical mentality⁴. Organizational climate is closely connected with organizational culture. The relations between them is complex. It is suggested that organizational climate is part of culture. The purpose of this study is to verify to what extent civil servants regard the organizational climate of Polish administration offices as possessing numerous negative features. The research has been carried out on the basis of the adapted Rosenstiel and Boegel questionnaire.

2. ORGANIZATIONAL CULTURE AND CLIMATE AND THEIR INTERRELATIONSHIPS

Nolan & Küpers (2009) write that “Organizational climate has been found to have a close, albeit ambiguous, relationship with organizational culture to the extent that the terms are sometimes used synonymously or indiscriminately”. Nevertheless, there are differences between them. In general, the term organizational culture refers to norms and values whereas the researchers dealing with organizational climate are preoccupied with psychological and communicational aspects of organizational life influencing one's experiences at work. Culture is more objective and general whereas climate can be regarded as a subjective attitude of employees towards the organization (Schneider, Ehrhart, Macey, 2013).

Research on organizational climate was initiated by psychologists as it emerged from gestalt psychology of Levin. It assumes that the social context of work influences workers' attitude to work and productivity. Research in this area started during World War II. The foundations of research was created by Douglas McGregor and Chris Argyris. At the beginnings of the 1970s first chapters on organizational climate appeared in textbooks concerning industrial psychology (Barbera, 2014). Organizational climate informs how employees experience and perceive the company. It is influenced by leadership styles, communication practices, workload pressure and employee recognition. A positive climate fosters a sense of belonging, motivation, and higher performance. This approach posits that organizational climate arises from the intersubjectivity of members as they interact within a context established by an organization's culture (Moran, Volkwein, 1992).

Research on organizational culture was initiated within the framework of sociological and anthropological thinking and thus it focuses on the collective rather than the individual. Bogale & Debela (2024) define organizational culture as:

A group attitude that evolves over time and proves resistant to modification once established. OCs significantly influence interpersonal interactions, behaviors, and communication among employees during day-to-day work. Consequently, OC emerges as a key organizational feature and situational aspect, exhibiting potential stability or flexibility that permeates all facets and activities of the organization.

The main elements of organizational culture are as follows: beliefs, ideologies, and values, symbols, language, narratives (myths, stories), and practices (rituals and taboos) which are transmitted by way of socialization to employees in the workplace (Trice, Beyer, 1993).

⁴ See for example: (Kieżun, 2013; Banajski, 2007; Hensel, 2011; Dolewska, 2017; Czubocho, 2022).

As regards the relationship between organizational climate and culture, the former is part of the latter. Organizational culture is part of sociological thinking about organizations. They both decide about employees' motivation, attitudes and loyalty. The organizational climate of an organization results from its culture. Therefore, researchers propose an integration of climate and culture thinking and research. (Schneider, Ehrhart, Macey, 2011).

On the other hand, one cannot underestimate individual perception of work environment for it affects employee (public servant) satisfaction and outcome. The organizational climate emphasizes the employees' perception of work environment rather than the environment itself. This subjective perception in turn is shaped by organizational culture to a substantial degree (Mikuła, 2000). Concentrating exclusively on group properties and values leads to the underestimation of human psychology. Organizational culture is positively related to organizational climate (Kasemsap, 2017).

Organizational climate is perceived through the lens of employee position in the organizational structure. For example senior employees seek professional career advancement opportunities and positive interpersonal relations in the organization. They aim at achieving their own goals which differ from the goals of the younger staff which can be motivated by simpler stimuli, such as pay raises (Wziątek-Staško, 2021).

3. ORGANIZATIONAL CULTURE IN POLISH ADMINISTRATION INSTITUTIONS IN THE LIGHT OF SCIENTIFIC LITERATURE

Cultural norms and values are recorded in the subconscious of the individual during childhood and adolescence and therefore changing them is practically impossible. As a result, national culture fundamentally influences the organizational culture in a given country. Makin, Cooper & Cox (2000) write that "because organizations exist within national cultures, they can be treated as subcultures". Hatch (2002) claims that "National cultural characteristics can be seen as part of the network of meanings that make up the culture of the organization". Each organization aims to shape the employee according to its own patterns. The proper organizational culture is to ensure the success of the organization. In reality, national culture always prevails over organizational culture, deciding to a large extent about the nature of the employee's behavior in the organization (national culture decides on the specific programming of the individual's mind).

Polish culture was created in circumstances involving feudalism (serfdom was abolished as late as in 1864), living under foreign rule (national uprisings and communism) and primeval fight for survival since the 1980's onwards and disobedience to the authorities regarded as oppressive and not independent. After 1989 as a result of the fall of the communist economy and widespread unemployment there were no favorable conditions for the introduction of Western standards of public administration. These factors decide about the ineffectiveness of the organizational culture of Polish system of administration (Czubocho, 2022).

Basic features of Polish national culture involve: the cult of hierarchy, seniority and power (ceremoniality), the prevalence of autocratic management patterns, formalization (rigid organizational structures), little appreciation for professionalism (employment and promotion of people not in accordance with meritocracy criteria), lack of initiative (passivity and waiting for a superior's official order), low value of work (work is an unpleasant duty), problems with teamwork skills. Differences of opinion or friendly criticism are treated as personal attacks. The organizational culture is clearly based on

Weber's bureaucratic organizational structure model. Inappropriate systems of remuneration and division of work between employees constitute another serious problem. In the practice of Polish organizations, seniority and hierarchy count, i.e. promotions and pay rises are granted not according to the employee's merits, but according to the length of service. Other non-meritorious criteria include the influence of party affiliation, family affiliations or informal connections (interest groups, cliques) on the functioning of organizations (Bąk-Grabowska, 2010).

Characteristics of Polish managers highlighted by scientific literature coincide with Polish national culture as well. Traditionally, uncritical and loyal members of the communist party apparatus without leadership skills, were promoted in Poland. After 1989, people of the old era still commonly held important positions and old traditions in terms of promotion were consolidated. A syndrome of a random and uncharismatic boss who uses repression against subordinates, eliminating subordinates who could potentially challenge him in the future, was created. According to Western standards of public administration, a manager should be a charismatic leader, i.e. a person with leadership and interpersonal skills. Employees should follow the manager's orders because they value him and not out of fear (the manager should have informal authority). The culture of an organization is determined by the management, which sets standards of behavior. Leadership skills, openness and free communication are important (Srokowski 2010).

The manager should give the subordinate a sense of strength as a leader and guide. In Polish conditions, managers often underline their authority and power over the employee's professional life requiring ceremonial treatment. Other flaws of Polish managers include a conviction of their own infallibility combined with a lack of tolerance for those who think independently, surrounding themselves with flatterers, dividing subordinates into their own and outsiders. A manager may not distinguish his own interests from the interests of the organization or identify his or her interests with the interests of the organization. Negative traits of managers are reinforced by the existence of a climate of impunity for public officials are rather rarely brought to justice. To sum up, scientific literature on the organizational climate of Polish public institutions underline its bureaucratic and authoritarian character (Czubocho, 2013).

There were also empirical research carried out on Polish organizational culture. The problems of Polish organizational culture include: the existence of informal groups in the organization which undermine the official rules promoted by organizations (40 percent of answers); underestimating the importance of the social life of the organization by the management (30 percent of answers) and not accepting common goals, values, norms and views at the individual or group level (21 percent of answers). The lack of a common language and conceptual apparatus characteristic of individual groups functioning in the organization (32 percent of answers) and the lack of clear indicators of desirable and undesirable behaviors in the organization (32 percent of answers). Employees are not motivated to work hard (42 percent of answers) and their acceptance for the system and managers is rather low (37 percent of answers). In this context Pietruszka-Ortyl (2016) writes:

Such results suggest the conclusion that organizational culture is not the subject of specific actions by managers of organizations, they do not try to shape it, identify the elements that create this core of the life of the enterprise. This may translate into a lack of employee involvement in the enterprise they are associated with, a lack of loyalty to specific groups operating in the organization,

and thus openness in sharing knowledge, limited teamwork activities, and individual interests remain paramount).

4. RESEARCH METHODOLOGY

Organizational climate of Polish system of administration was explored through the distribution of the adapted Rosenstiel and Boegel questionnaire. Adaptation of the questionnaire to Polish circumstances has already taken place in the past (Durniat, 2012). The authors used their own version of the questionnaire referring to Polish system of administration. According to Rosenstiel and Boegel the questionnaire consists of five dimensions which are as follows:

- relationships among the employees
- style of management
- work organization
- information flow and communication within the company
- representation of employee interests
- occupational development possibilities for the employees (motivation, evaluation, promotion) (Rosenstiel, Boegel 1992).

The survey was carried out in August and September 2024 in the eastern part of Podkarpackie province. The sample included civil servants employed both by local government and the state system of administration. The survey was distributed to 140 civil servant. A 94 per cent response rate yielded 132 responses.

The main research question was as follow:

- What is the perception of the organizational climate in Polish system of administration in the opinion of civil servants?

Other research questions were formulated as well:

- If the organizational climate in the opinion of employees corresponds to the scientific literature findings?
- To what extent is the rating of organizational climate influenced by the characteristics of respondents?

Table 1. Structure of the research sample

Measure	Item	Frequency	Percentage
Gender	Female	72	55%
	Male	60	45%
Age	Under 45	82	62%
	Over 45	50	38%
Rank of employee	Entry level/trainee	20	15%
	Regular stuff/mid-level staff	76	58%
	Managerial stuff	36	27%

Source: Own study.

5. RESEARCH RESULTS

The respondents were asked to indicate their attitude (to what degree they agreed with the statements) on a Likert scale of 1-5 where numbers corresponded to the degree the surveyed persons agreed with the statement. Option number one corresponded to the

answer “I strongly disagree”; and option number five indicated “I strongly agree”. The overall assessment was calculated as the average rating from all sections of respondents.

Table 2. General aspects of organization functioning

	Women	Men	Entry level/trainee	Regular staff/mid-level staff	Managerial staff	Staff aged 45 or younger	Staff older than 45 yo
In our office, great importance is attached to ensuring that everything works well.	3,63	2,86	3,40	2,94	3,84	3,68	2,64
It is no wonder that people often get sick in the conditions set by our office.	2,55	3,60	2,60	2,57	2,55	2,31	2,96
There is no sense of community here, everyone thinks only about themselves.	2,83	3,0	3,1	2,89	1,33	2,96	2,31
It is better to keep your (personal) opinion about the internal affairs of the office to yourself - you never know how someone's honest statement will be received.	2,97	3,50	2,88	3,60	2,38	3,12	3,80
If someone wants to avoid intrigues, they do not speak out about certain matters.	2,27	3,51	2,90	3,47	2,44	3,91	4,80
In our office, you can only be someone if you have good connections	4,02	3,13	4,30	4,96	1,88	2,90	3,32
Sycophants are most successful	3,38	3,20	4,20	4,30	2,55	3,31	3,40

Source: Own study.

Chosen results indicate that according to men and the older staff, it is better not to talk about the internal affairs of the office (grades accordingly 3,5 and 3,8). Employees are also afraid of intrigues, especially older ones (grade 4,8). It indicates that there may be a hidden dimension of organizational climate in the analyzed offices. Communication is not entirely free among the employees.

Public administration differs from business administration in that there is no need to achieve positive financial results. Pressure is not put on civil servants to be nice to customers to encourage them to show up again and spend money on goods or services. There are no objective measures of employee performance with this respect (still, civil servants are trained to adopt business standards). The organizational climate of offices theoretically should be more relaxed as managers have less freedom in the field of personnel management. The surveyed civil servants grade general working conditions rather favorably. For example they claim that you are not pushed to work constantly; you are not treated unfairly; superiors make sure that cooperation between subordinates is free from friction and conflict. At the same time employees claim that there are some problems with communication between supervisors and subordinates. One cannot talk to

managers entirely openly about problems if one is dissatisfied with something and superiors pretend to take into account the opinions of the staff but not necessarily take them into account.

Table 3. Opinions concerning the management of organization

	Women	Men	Entry level/trainee	Regular staff/mid-level staff	Managerial staff	Staff aged 45 or younger	Staff older than 45 yo
Good work is appropriately appreciated by our superiors.	4,08	2,90	3,20	2,89	3,65	3,02	2,96
Most problems are solved through talks with superiors, during which the opinions of employees are taken into account.	3,62	4,06	4,10	3,96	3,58	3,87	3,66
Our superiors make sure that cooperation between subordinates is free from friction and conflict.	3,38	3,61	3,53	3,57	3,63	3,78	3,89
Our superiors want to give the impression that they know everything	3,38	3,63	3,40	3,65	3,22	2,75	3,32
Our superiors try to blame their mistakes on us.	1,43	3,10	3,70	3,18	2,2	2,76	3,41
Decisions are discussed with employees, but their implementation is completely different than agreed.	2,58	3,66	3,50	3,0	3,58	3,12	2,97
Supervisors understand that situations should shaped in such way that everyone can increase their efficiency.	3,20	3,43	3,50	3,21	2,55	2,98	3,10
Supervisors understand our concerns and pains.	2,77	2,86	2,40	3,92	2,84	2,76	3,96
Supervisors treat us unfairly.	2,63	2,53	2,40	2,50	2,27	2,48	1,98
If you are dissatisfied with something, you can talk about it openly with your superior.	2,97	3,97	2,10	3,13	3,44	3,58	3,87
In our company, you are constantly pushed to work.	2,61	2,10	2,60	2,78	2,55	2,33	2,97
When making decisions that directly concern employees, they are not asked for their opinion in advance.	2,25	3,52	1,70	2,89	2,44	2,22	3,02

Source: Own study.

Table 4. Work organization and communication

	Women	Men	Entry level/trainee	Regular staff/mid-level staff	Managerial staff	Staff aged 45 or younger	Staff older than 45 yo
Working conditions leave much to be desired.	2,50	2,14	2,60	2,55	1,94	2,47	2,50
Everyone has to fight for their own interests to be taken into account.	2,61	1,98	2,80	2,84	2,05	2,60	2,56
Gossip takes the place of factual information.	2,75	1,84	3,60	2,39	2,05	3,20	2,03
It often happens that we are presented with faits accomplis	2,80	2,32	3,80	3,02	2,16	3,18	2,98
The management of our company is ready to take into account the ideas and proposals of employees.	3,16	3,74	2,20	3,21	3,65	3,10	3,60
Tasks are distributed fairly.	3,19	3,56	3,63	2,49	3,93	3,44	3,11

Source: Own study.

The managerial staff is not oppressive at least pretending that they intend to create good working conditions and relations among civil servants. On the other hand, the organizational climate is formalized and the main preoccupation of the superiors is acting in accordance with the law rather than creating pro-efficiency organizational climate. One can say that the rule of law is more important than creating effective team work favouring achieving goals. The obtained results demonstrate that there are problems with communication (gossip, intrigues, lack of unrestrained relations with superiors) which go against the main tenets of current management standards in business setting. No wonder that with reference to pro-efficiency conditions the grade awarded by the surveyed civil servants to their organizations is 3,13.

6. CONCLUSIONS

The main objective of the study was to investigate whether the organizational climate in Polish system of administration as presented in scientific literature is confirmed by the employed civil servants. The rather negative portrayal of the climate in literature was only partially confirmed by the surveyed civil servants. The rating awarded by civil servants to their organizations is average which indicates that they perceive the examined dimensions of organizational climate as fairly acceptable. The organizational climate is not as dysfunctional as it might seem. It might be that scientific literature highlights some pathological phenomena which are less widespread than one might think. On the other hand, civil servants are immersed in the culture of their institutions and therefore, they may regard it as natural whereas scientists apply the standards of Western public and business administration as the point of reference. It is necessary to look at the culture and climate of organizations from the outside to judge them impartially.

From sociological point of view grading is always a function of the initial assumptions. Therefore, in spite of the fact that the results are better than expected, the organizational culture and climate of Polish system of administration leave much room for improvements. Some data are indicative of serious problems. For instance, in terms of creating conditions for effective work employees awarded their superiors a grade of 3,13. The grade seems too low to foster a pro-efficiency organizational climate which requires stronger motivation of employees and unrestrained communication. With regard the demographic structure of respondents the results are inconclusive. In case of some questions employees older than 45 years old view the organizational climate more negatively than younger ones and men tend to rate the organizational climate lower than women. Nevertheless, general results do not differ substantially. It comes as no surprise that the managerial staff was most satisfied with the organizational climate as they contribute to its creation to a degree and benefit from it.

As far as recommendations for additional thinking and research are concerned, the vast majority of research on organizational culture and climate is made in business setting. Nevertheless, organizational culture and climate in public institutions and business setting differ to a substantial degree and therefore, the research results achieved in business setting cannot be automatically transferred to the public sphere. In the area of public administration, the elements that influence its culture and distinguish it from the business culture are as follows:

- formalized nature, hierarchy, weak connection between work results and employee remuneration;
- less autonomy of the manager in the area of personnel management, which results in lower motivation, greater aversion to risk taking;
- relations of the client with the office based on legal obligation (dependence on the official who is not interested in attracting clients) (Młodzik, 2014).

In consequence, knowledge management, and job performance play a less important role in public administration setting. Hence, low motivation of civil servants in the area of promoting the image of the office. For the above mentioned reasons it is difficult to create a pro-efficiency organizational climate in public administration. The perception of organizational climate depends on the position of employees in organizational structure. For example, senior employees seek professional career advancement opportunities and positive interpersonal relations within the organization.

As a result, civil servants call for changes in the organizational climate involving granting them greater independence and responsibility in performing tasks (Seredocha, 2013). They would like to work in accordance with the offensive employee model within the framework of a pro-efficiency culture. They postulate appreciating professionals (knowledge workers), reducing bureaucracy in offices and making the work of offices more flexible. They confirm the need for changes in the organizational culture. Unfortunately, they see certain barriers in this respect on the part of management.

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POST-DEMOCRACY. REMARKS ON APPLICATION POSSIBILITIES AND LIMITS OF THE CONCEPT IN THE CZECH CONTEXT

The concept of *post-democracy* is often used to describe the state liberal democratic regimes of the so-called West have currently reached. But is it possible to apply the notion broadly to any country? Does labeling a particular country as post-democratic always mean the same thing? Is there not a risk that the incorrect use of this term leads to an erroneous analysis of the state of democracy in the country in question? The text first focuses on the concept of post-democracy and its various definitions in the works of political theorists, while paying crucial attention to Colin Crouch's and Jacques Rancière's approaches. In the second part, the text tries to find out which of the concepts is more justified in the Czech context. Emphasis is placed on the criterion of the historical presence/absence of the socio-economic cleavage.

Keywords: post-democracy, Colin Crouch, Jacques Rancière, liberal democracy.

1. INTRODUCTION

A decrease in the level of trust in politics, a decrease in political participation and satisfaction with liberal democratic regimes, these are the most frequently mentioned accompanying manifestations of the crisis of liberal democracy in a number of European countries (Urbinatti, 2006). Whether there is a gradual transformation of democratic institutions in the countries concerned (Poland, Hungary) or the strengthening of anti-systemic political parties (Germany, Northern European countries), one thing seems indisputable – liberal democracy is no longer celebrating the triumph, as it appeared at the beginning of the 21st century.

In response to this development, some theorists began to talk about the so-called *post-democratic state* (Rancière, 1995; Crouch, 2000; Crouch, 2004; Mouffe, 2005; Mouffe, 2019; Habermas, 2012). The term *post-democracy* is intended to refer to a situation in which democratic political institutions and mechanisms formally remain, however, their

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gradual transformation takes place, reflecting decreasing participation in the political sphere (Rancière, 2004) or the interference of external actors in the political process (Crouch, 2004). In this situation, for example, Swyngedouw (2018) talks about the proximity of post-democratic models to authoritarian regimes.

The concept of post-democracy has naturally received diverse applications; when describing the reduction in the quality of representative democracies in general, without territorial distinction (Augustín, 2017), liberal democracies of the Western world (Crouch, 2004), countries of the European Union (Hrubec, 2005) or, finally, democracies in Central Europe (Kovács, 2010; Kantor, 2019).

In order not to consider the concept of post-democracy as a buzzword (as Augustín suggests; Augustín, 2017, 94), German political scientist Klaus von Beyme (2017) tried to clarify the possibilities and limits of its use by summarizing the approaches to date. He defined four basic mechanisms that exist in post-democratic societies. They are: (1) the oligarchizing of democracy, (2) the disruption of the separation of powers, (3) the rise of populism and (4) corporatism in the sense of the entry of economic actors, especially large (transnational) corporations, into the political process and influencing it (Beyme, 2017).

In the Czech environment, the debate on the topic of post-democracy has not developed much. The most comprehensive text is offered by the already mentioned Michael Augustín (2017), who seeks a solution to the post-democratic crisis of representative democracy in more inclusive forms of political participation and representation. An older debate on the concept of post-democracy in the collection of texts of the Centre for Economics and Politics (Brokl, 2006) brought a consensus that in post-democratic societies there is a restriction of citizens' access to the political sphere, which results in a decrease in satisfaction with the liberal democratic regime and an increase in frustration with politics as such. Doubts about the applicability of the concept to Czech, or however, the Central European policy was not formulated in the mentioned texts.

And it is precisely to this problem that the basic questions of this text concern:

- *Is the concept of post-democracy, or the concepts of post-democracy by different authors, conceptually linked exclusively to the environment of Western Europe?*
- *Is it possible to apply it to the Czech Republic?*

2. “EMPTIED” DEMOCRACY – COLIN CROUCH’S CONCEPT OF POST-DEMOCRACY

In order to answer these two questions, it is naturally necessary to conceptualize the notion post-democracy. In general, Colin Crouch's concept of post-democracy receives the most attention, according to which contemporary liberal democratic regimes are characterized by (1) the reduction of the influence of elected governments as a result of political and economic globalization, (2) the influence of economic actors within the political process, and (3) weak relationship between people/social groups on the one hand and political parties on the other; according to him, these symptoms are supposed to represent the post-democratic state in societies, which is manifested by numbness and dissatisfaction with politics³.

³ However, it must be added that the concept of post-democracy in Crouch's concept does not represent one pole of the binary concept of democracy – post-democracy. In Crouch's view, democracies and post-democracies are seen as ideal types between which individual countries oscillate, based on whether or not the following causes occur and to what extent they are represented in societies.

And why do liberal democratic societies transform into post-democracies? According to Crouch, three basic causes can be traced:

- [1] There is a numerical and influential weakening of the working class, which is the key supporting actor of liberal democratic regimes. This weakening reflects the processes of automatization, digitalization and robotization of industry that have been underway since the 1970s and 1980s.
- [2] The relationship between the electorate and political parties is changing. In particular, parties on the left had to respond to the transformation of their traditional electorate, now targeting heterogeneous interest groups, abandoning the primary emphasis on welfare-state policy and the inclusion of workers in the democratic process. In other words, the socio-economic cleavage is weaker and weaker (Crouch, 2012, 31).
- [3] Large (transnational) corporations are gaining more and more influence on the political decision-making of elected representatives. They can influence decisions on the amount of taxation or the setting of the labour code through their “blackmail” potential. In order to attract capital to the country and the associated creation of employment opportunities, elected representatives set rules that are favourable to companies – often without regard to the real needs of citizens, which may be in opposition to the needs of large corporations (Crouch, 2004).

This concept was originally applied by its author to the countries of Western Europe and North America, namely Great Britain and the United States of America. Later, it was used by him himself (see e.g. Kantor, 2019) and by some theorists (see above) to describe the state of liberal democracy in other countries as well. Nevertheless, or precisely because of this, the question arises, how justified is the widespread use of this term?

To understand Crouch's concept of post-democracy, it is necessary to show and understand how the author understands democracy itself. Crouch sees democracy not only as a set of procedures and institutions, but as a normative aspect of the life of the relevant political community. For him, the value of political participation is key, which he understands not only as active or passive participation in elections, but also, for example, as a meaningful political discussion (Crouch, 2012). This idealistic conception of democracy then serves as a model for evaluating real societies that should aspire to achieve such an ideal.

Some authors draw attention to a certain idealization of the history of democracy in Crouch's texts (e.g. Kalev, 2011). Crouch refers to the period of the late 40s and 50s of the 20th century in the environment of Great Britain (i.e. the post-war period) as a certain democratic *peak* (Crouch, 2004)⁴. According to him, this period was characterized by two key features – on the one hand, the strong participation of the working class in politics, and on the other hand, the associated large-scale government interventions in the economic sphere, motivated by the Keynesian concept of public policies. This means that Crouch understands democracy as a living phenomenon that undergoes changes over time. The above-mentioned processes and their impact on democratic regimes currently lead to the fact that the quality of democracy decreases and returns to the level it was at historically. Crouch's conception of democracy thus resembles a “parabola” (Crouch, 2004), where the quality of democracy oscillates over time. Thus, while in the case of Great Britain the

⁴ In other countries, Crouch identifies a different time period – for example, in North America and Scandinavia already before the Second World War (Crouch, 2004).

democratic curve was at its imaginary peak in the period after the Second World War and in the 1950s, it is currently on the opposite side of the axis.

The metaphor of the parabola helps us to understand the meaning of the prefix *post-*, which in democratic societies indicates the imaginary movement of the curve of the development of democracy towards negative values (whereas he does not work with the value zero in his theory). It can help us to divide the history of the development of phenomenon X into three periods (Crouch, 2004). The first period can be called the pre-X period; denotes the state when society lacks the X we are monitoring. This period is followed by period X, which denotes a state in which there is a high level of X in society. This period can be clearly defined in time, since the changes by which X affects society which X has not yet received are obvious. The third period is the period that we can describe as post-X. In it, other “qualities” enter society, which are responsible for the fact that the influence of phenomenon X on society decreases. X nevertheless left its mark on society. And Crouch claims that in the third period, i.e. the post-X period, society will begin to resemble the state in which it was in the pre-X period, but certain traces of X's influence on it will remain present in society.

At the same time, Crouch equates the parable of the development of democracy with the development of the working class; he places the pre-democratic period in the period when the working class gradually strengthened and fought for better living conditions. At this time, the legal anchoring of trade unions and their gradual transformation into politically active organizations takes place – generally in the countries of Western Europe, this is the period of the end of the 19th century (Crouch, 2004). At this time, there is also a struggle for political rights, with these struggles taking different forms in different countries. In general, it can be said that the pre-democratic era gradually brings political rights to all people, regardless of their class position, while the struggle of trade unions and the working class to win these rights plays no small role.

The subsequent democratic period comes at a time when the working class is the dominant social class; it is the support of a democratic political regime and governments promoting Keynesian policies and a strong welfare state. People are actively interested in politics and participate in it, because they see that their demands find a real response in the system. The standard of living of the working class is gradually increasing. Since the 1960s, however, along with the gradual transformation of industrial production and the strengthening of the consumer society (see e.g. Marcuse, 1991), the working class has been weakening, as part of them is moving to other sectors – primarily services. The fragmentation into several sectors and the weakening of the working class means that they are no longer able to organize themselves effectively in the fight for their rights and for a strong welfare state (Crouch, 2004). Socialist and social-democratic parties can no longer rely on the support of the homogeneous working class in the past, so they try to appeal to other groups of the population; but with uncertain results. Since the end of the 20th century, social policies and the welfare state in general have been weakening. Neoliberal policies are gaining momentum along with the entry of big capital into the political sphere. And it is precisely this period that Crouch calls post-democratic. People become politically apathetic because they do not see any party or organization in the political system that can represent their interests. The level of political participation is decreasing and the quality of democracy is increasingly moving away from the participatory ideal.

At the same time, according to Crouch, post-democratic society is in many ways similar to pre-democratic society; that is, a society in which the element of participatory citizenship is not sufficiently developed and in which participatory democratic mechanisms do not

fully function (Hrubec, 2005). Of course, there are many differences, but there is a clear parallel between the poor state of the working class (fragmented, less organized than in the past, without strong representation) and the insufficient level of political participation in society (although in the post-democratic era this level has a different cause).

This conclusion can lead us to the idea that we can find the possibility of solving the post-democratic state in history – that is, in the time when democracy was successful in society. It can be argued that if we want society to return to a state where democracy was in a satisfactory condition, it is appropriate to bet on recipes that helped society to transform from a pro-democratic state to a democratic one – i.e. mass organizing and strengthening of the working class and efforts about a policy leading to an increase in their standard of living.

This effort led “from below” (as opposed to systemic change promoted by the elite) would also limit the penetration of capital and neoliberal policies into public life. This could lead to a reduction in political apathy, an increase in interest in politics and an increase in political participation – because people would see that their political demands are being answered in the system. This would reverse the movement of the imaginary democratic parabola.

3. JACQUES RANCIÈRE'S HISTORICALLY UNANCHORED POST-DEMOCRACY

Jacques Rancière (2004), like Colin Crouch, places democracy and post-democracy in a certain historical framework. According to him, we can talk about post-democracy in the period after the fall of the Iron Curtain and the collapse of the Soviet bloc, which in the Cold War era represented the enemy of democracy in the form in which it manifested itself in the Western Hemisphere (Rancière, 2004).

However, this historical framework is not primary for him. The important thing is that together with the loss of the main enemy should come the end of politics (Augustín, 2017) – thanks to the discourse that democracy has proven to be the most effective way of governing public affairs. Basically, Rancière understands democracy as an agonistic framework for the exchange of views; but this very concept of democracy is declining in the era of the end of politics. On the contrary, consensual and formalistic practices that suppress dissent in society are gaining importance (Rancière 2004). Post-democracy is thus manifested on the one hand by suppressing the critical opinions of citizens (and thus actually the opposition as such) through emphasizing the necessity of managerial administration of public affairs, and on the other hand by emphasizing the efficiency or economic well-being that (liberal) democracy brings to people. At the same time, Rancière notes the key role of the rich elite (Rancière, 1999), which has a great influence on the political sphere and uses it to define and diminish the role of the poor.

In short, the basic thing that happens in post-democratic regimes is the gradual disappearance of the political sphere (Augustín, 2017). And finally, it is precisely the political sphere that forms the content of politics as such. Without it, as Olivier (2015) reminds, for example, politics is a meaningless administration of public affairs.

This interpretation is not fundamentally different from the one Crouch is working with. For him too, one of the important elements is the possibility of political participation and meaningful political communication. However, this is getting less and less in post-democratic societies – the political debate is dominated by political marketing, which diverts people's attention from important problems and systemic questions to marginal

ones. The possibilities of political participation are further reduced by the transformation of political parties, within which the possibilities of participation decrease and where the leader or a narrow group of people acquires more and more decision-making powers.

Nevertheless, it makes sense to talk about two different conceptions of post-democracy in Crouch and Rancière. The distinguishing aspect is the already mentioned concept of the relationship between the transformation of democracy into post-democracy and the previous historical development. While for Crouch, the development of democracy in post-democracy is firmly tied to time and history (similarly, Martel, 2015), for Rancière, post-democratic practices appear in connection with the state of democracy. The latter may be influenced by historical circumstances, but these circumstances are not the primary guide to the democratic “crisis” and the emergence of post-democratic practices. The primary cause is the disappearance of politicians from democratic regimes.

Although both authors identify similar symptoms in the case of post-democracy, in Rancière's concept we do not encounter the problem of applying the concept to a different environment. This indicates the possibility of applying his concept of post-democracy also to the environment of the Czech Republic, and possibly also to the entire Central European area. A key criterion could be the socio-economic cleavage, which in Central Europe did not develop continuously during the 20th century, but was renewed only after the fall of the Iron Curtain, and thus could not fully establish itself in the dimensions to which it developed in the modern era in Western European countries.

4. CONCEPT OF POST-DEMOCRACY AND MODERN CZECH POLITICS

Following on from the previous passages, this text broadly identifies post-democracy as the state of democratic development that liberal democratic societies have begun to reach in the last two decades. Within this state, formal changes in the liberal democratic setting do not occur, but the quality of democracy decreases in the sense of diminishing the influence of citizens on politics. That is, what Donatella della Porta refers to as a “minimalist version of the liberal vision of democracy” (della Porta, 2015), when liberal democracy is perceived in a strongly elitist way (della Porta, 2015) and the political participation of citizens is narrowed only to the act of elections itself (della Porta, 2015). At the same time, beyond the concept of a minimalist version of liberal democracy, the influence of economic actors is amplified in societies through the increase of their political power (Crouch, 2004; similarly, Rancière, 1999).

However, different authors define the causes of the establishment of the post-democratic state and its historical anchoring in different ways. And that is why it makes sense to ask the question which of the concepts of post-democracy presented above is better applicable (if at all) to the Czech environment, with an emphasis on the degree of compatibility of the Czech model of democracy with the Western one. As an analytical criterion, we will use the presence of a socio-economic conflict line, with the presence of which both Crouch (2012) and Rancière (1999) count on in “healthy” liberal democratic societies.

We stated above that, according to Crouch, the main force behind the maintenance and expansion of liberal democratic practices was the working class. At the moment of its weakening, the weakening of the support of parties of the political left, and at the same time the weakening of the socio-economic cleavage (Crouch, 2004), there is a decline in the quality of liberal democracy and the rise of post-democratic tendencies. In order to be able to apply this thesis to the Czech environment, we must first verify that in the Czech

context the conditions of the decline of the working class and the reduction of the importance of the socio-economic conflict line specified by Crouch are present and that they are related to each other.

According to Jiří Šafr (2008), after the fall of the communist regime, there was a drastic decrease in the number of people in blue-collar professions, and thus also a decrease in the number of manual workers. While skilled and unskilled workers made up over 62% of the Czech population in 1988, in 2006 it was just over 36% of the population (Šafr, 2008). Šafr also notices that along with the decline of the manual labour class, there is an increase in the number of people we describe above as the non-manual labour class. While in 1988 it represented 9.5% of the Czech population, in 2006 it was already 19.8%; its number practically doubled.

And more recent data shows that this trend continues. Fialová and Želinský (2019) state that between 2006 and 2016, the number of manual workers continued to decrease, which is supposed to be a consequence of the transformation of the industrial and agricultural sectors. On the contrary, the proportion of people who can be described as non-manual working class is constantly increasing. We thus see that the changes in the social structure of society, which Crouch pretends in his theory, also exist in Czech society. However, it is questionable to what extent these changes actually cause the weakening of traditional left-wing parties.

In Crouch's British example, the criterion of changes in the class of manual workers is linked to the development of the socio-economic cleavage. However, while in the countries of Western Europe the socio-economic cleavage continued to exist even after the Second World War, in Central and Eastern Europe it was artificially suppressed after the establishment of the communist regime. Four decades of totalitarianism, or the post-totalitarian regime then caused such a strong disruption within social classes and a high degree of levelling of society that it is impossible to talk about a socio-economic cleavage in such a form as in the countries of Western Europe.

Hloušek and Kopeček (2004) therefore talk about the fact that in post-communist and newly transforming societies, the conflict on this axis takes place between the so-called winners and losers of the transformation. That is, between those who profited from the fall of the (post)totalitarian regime, and those who found themselves in a disadvantaged social position after the transformation (Hloušek, Kopeček, 2008). Nevertheless, in the last decade of the twentieth and in the first two decades of the twenty-first century, the socio-economic cleavage of transformation is approaching the standard socio-economic cleavage. It corresponds to the continuation of the economic and political transformation of society, the greater intensity of the issues of wealth redistribution, etc., on which these cleavages are built in the countries of Western Europe.

In general, it can be said that the significance of the socio-economic cleavage of transformation has gradually increased in Czech society since the beginning of the democratic transformation (Bureš et al., 2012). While the main cleavage of transformation in the first free elections in 1990 was the form of the regime, later, together with the economic transformation and the transformation of the ownership structure in society, the socio-economic cleavage of transformation in society is becoming more important for voters. Since the parliamentary elections of 1992, Bureš et al. (2012) identifies a sharp division of Czech society into supporters of the left and the right, which reflects the projection of voters' interests into their electoral preferences. Vlachová states:

Gradually, as significant reforms were carried out and society returned to a more peaceful state with the everyday problems of a country of democratic capitalism, people, especially on the left and in the centre, brought their subjective orientations closer to the objective values and political programs embodied by their political representatives (...) Left-wing voters are starting to differentiate themselves more and more from right-wing voters (Vlachová, 1998).

Based on the cleavage of transformation in the Czech party system, two main poles gradually crystallized: the Civic Democratic Party as the main pole on the right (representing the interests of the so-called winners, see above) and the Czech Social Democratic Party as the main pole on the left (representing the interests of the so-called losers). These poles are clearly visible since the elections to the Chamber of Deputies of the Parliament of the Czech Republic in 1996, when the party spectrum is simplified and both parties occupy the position of hegemon in their part of the party spectrum (Šimoník, 1996; Vlachová, 1998; Maškarinec, 2019).

Subsequently, the socio-economic cleavage of transformation already holds its privileged position in the Czech party system, all relevant political parties are clearly defined on the left-right axis (Bureš et al., 2012), at the same time, voters are gradually beginning to identify themselves on the right-left scale. According to Vlachová (2002), 95% of the Czech population could be placed on this axis in 1996, even in the 1998 elections this number remained practically the same. The above-mentioned ability of voters to identify themselves within the right-left scale points to the existence of class consciousness among voters and their corresponding voting behaviour.

However, socioeconomic cleavage was not the only determining criterion of the voting behaviour of individuals (Kunštát, 2007). A personal class affiliation was one of the factors influencing voter behaviour (Linek, Voženílková, 2017), but not the only factor. Although there are doubts about the validity of the thesis about “democratic class struggle” – that is, sociologically conditioned class voting in post-communist countries (see e.g. Smith, Matějů, 2011), we can say that together with how economic reforms and changes in the ownership structure in society brought the Czech countries of Western Europe. In other words, we can no longer fully talk about the specific environment of a post-communist country. This is confirmed, for example, by the just-mentioned research by Smith and Matějů, who pointed out that since the 1998 parliamentary elections there has been a strengthening of class-based voting behaviour, namely a greater inclination of the working class to vote for left-wing parties (Smith, Matějů, 2011; Večerník, 2009).

After the 2010 parliamentary elections, the hegemons on both sides of the political spectrum are gradually weakening; both the ČSSD on the left and the ODS on the right are losing voters who seek representation of their interests in other parties. While in the parliamentary elections in 2006 the combined electoral gain of the ODS and ČSSD was over 67%, in the 2013 elections it was just over 28% and in the 2017 parliamentary elections the combined gain of the two former hegemons was roughly 18.5% of the vote.

If we look at this transformation through the lens of a spatial analysis of election results (Maškarinec, 2019), we will see that the voters of these parties resorted to new political entities. Regions inclined to vote for the ODS and the right in general – i.e. regions more developed (Maškarinec, 2019) and less industrialized – recorded higher support for new center-right parties (TOP09 or the ANO movement in 2013; see Pink, Voda, 2014), while industrial, peripheral and less developed regions that have historically voted for the left –

especially ČSSD and KSČM – recorded higher support for Úsvit, SPD or ANO (the latter underwent a change in voter orientation) in 2017 (Pink, Voda, 2014).

We can thus see that voter support has moved away from the ODS and ČSSD, but it has not gone in the same direction. According to Pavel Maškarinec, it can be concluded from this that the socio-economic background of the voters still plays a role, at least to a certain extent, in which parties they vote for – at least if we consider that in “poor” regions more often people who can be classified into lower social classes live, while in “rich” regions, those that we can classify as a higher social class. Using this example, however, we cannot reliably demonstrate whether the extent to which the parties elected by them promote their class interests is still a decisive factor for individual classes, i.e. whether the socio-economic cleavage plays a major role in their decision-making for these voters, or whether they make decisions on the basis of something another – for example, the leaders of individual parties (Crouch, 2004) or their perceived competence to deal with current issues.

In any case, we have shown above that in the Czech environment we can trace both the breakdown of the historical class composition of society, where more than half of society was made up of members of the manual labour class, as well as a significant decrease in support for the traditional left, which, according to Crouch's thesis, represents the interests of this class.

However, it must be emphasized: although these two trends may be related from today's point of view, we cannot trace this correlation in time. The decline of the manual labour class was fairly constant over time; we can trace its beginnings to the turn of the 80s and 90s of the 20th century and it continues until today. However, the development of voter support for the traditional left shows a gradual and constant negative trend only in the last ten years⁵.

The data show that voter behaviour in the Czech environment is still influenced to some extent by class affiliation (Maškarinec, 2019). However, this does not clearly show that the socio-economic cleavage of the transformation itself has an effect on the voting behaviour of voters. Different voting behaviour can also be explained by other mechanisms. According to Marcela Voženílková (2018), in the Czech environment, the leader effect plays a large role in voter decision-making – people decide which party to vote for, on the basis of who heads the political party. According to her, this was particularly important for voters of the ČSSD and ODS parties. Voženílková states:

Since the election of the ČSSD and ODS is programmatically different and reflects a different side of the class conflict line, the effect of the leaders could have been “hidden” under the label of programmatic left-right voting. Voters without ties to political parties, and therefore potentially volatile voters, had only stable parties to choose from in previous years due to the frozen party offer. But as soon as the offer changed, those voters who previously made decisions based

⁵ If we look at the development of where people are placed on the imaginary axis of right-left political orientation, we will see that, paradoxically, most people identified themselves as left-oriented in 2013 (over 40% of voters; CVVM 2019). Since then, the number of people who align themselves with the left has been decreasing, in the first quarter of 2019, only 23% of voters aligned themselves with the left. In proportion to this, the number of people who aligned themselves with the centre or the right gradually increased.

on leaders among stable parties began to make decisions for new, populist parties (Voženílková, 2018).

This explanation finds support in the data. A post-election analysis of voter decision-making in the 2017 parliamentary elections (Median 2017) shows that the personality of candidates and their perceived morality and honesty is the most important parameter for voters. The perceived competence of the parties on individual issues shows a similarly high value. The classification of parties on the right-left scale and specific proposed solutions from party programs are less important for voters. And according to Voženílková (2018), for example, in the case of the personalization of electoral decision-making, it may not be a new phenomenon.

In summary, if Crouch reflects on the development of British society and the gradual erosion of the socio-economic cleavage since the end of the Second World War in his thesis on the post-democratic state, it gives him the opportunity to observe both the rise of the manual working class and its influence after the Second World War, as well as its gradual decline. At the same time, this development is not interrupted in Britain, because the democratic regime continues. This leaves the possibility of the existence of an authentic class conflict in society and the subsequent reaction of the political parties to the given cleavage. The socio-economic cleavage in British society also corresponds to the standard theoretical definition and other variables do not enter into it (such as the consequences of economic transformation – see the Czech case).

In contrast, the post-communist situation is different. Moreover, due to the development of party systems and cleavages of transformation in Central European countries, the possibilities of applying Crouch's concept are rather debatable. Hloušek and Kopeček (2004) point out that electoral volatility within the party systems of post-communist countries is significantly higher than in the party systems of Western Europe; the different understanding of the concepts of right and left and the associated value orientation of political parties is also problematic. The socio-economic cleavage, on the weakening of which Crouch bases his argument, takes on a different form than in the British environment due to the different historical anchoring and organization of party systems in (not only) the Czech environment; last but not least, it is due to the levelling of society brought about by the communist regime. Because of this fact, there is no pure and long-term form of class conflict in the Czech environment. In the Czech environment, this conflict is renewed at the beginning of the 1990s, bringing with it an ethos of coming to terms with economic transformation, which disturbs the “purity” of class struggle in the form that we can trace in the British (and generally Western) environment.

The different form of class conflict and its anchoring in the economic transformation of Czech society at the beginning of the 1990s, plus other variables entering into the voting behaviour of the Czech population, which we mentioned above. These are the reasons why the concept of post-democracy, which Crouch builds on the weakening of the relationship of the manual working class to traditional left-wing parties and the weakening of the socio-economic conflict line at the expense of other conflict lines, cannot be applied without problems in the Czech environment.

However, does this mean that using the concept of post-democracy in the Czech environment is not possible at all? Not. As we have shown above, the concept does not need to be derived from a particular historical context. The concept of post-democracy, as understood by J. Rancière, appears following the disappearance of the “political” dimension from the political sphere. This means that, like Crouch, post-democracy is not

limited to a certain setting of the socio-economic conflict line or a pure form of class conflict. According to Rancière, one can talk about post-democracy when discovering a certain type of political practice in which political conflict is dampened (similarly see Wilson, Swyngedouw, 2014), which we must understand within his perception of democracy as an agonistic framework for the exchange of opinions.

For Rancière, the fact that a new consensus on the basic settings of its functioning and basic political issues is gradually deepening in a given society is key, which manifests itself in the gradual distancing of citizens from the political sphere (see Wilson, Swyngedouw, 2014). Politics is then presented as an exclusive space for technocratic decision-making by experts who, after all, have better knowledge of the functioning of society than ordinary citizens. The political competence of the citizen is thus diminished in favour of expertise (by the way, similarly see Crouch above).

Can we talk about a similar trend in the environment of Czech politics? In recent years, a number of political scientists have pointed to the phenomenon of technocratic populism (e.g. Havlík, 2019) or business parties (e.g. Hloušek, Kopeček, 2017) in Czech politics. Both point to the existence of a post-democratic state, as perceived by Rancière and partly by Crouch (see above).

Let's start with business parties and stick to the basic conceptualization of business parties as presented by Hloušek and Kopeček (2017). They understand them as parties created on the basis of the efforts of their leader, who comes from a business environment, to create a tool to influence the political situation in society to his advantage. The activity of such a party is strongly centralized, it does not rely on a broad membership base, nor can it rely on pre-existing political influence in state structures during its creation. Business parties are also generally united by their ideological flexibility and treatment of political issues and personalities as marketing products (Hloušek, Kopeček, 2017). The authors point to the repeatedly successful ANO movement as one of the examples of such a party.

This is also noticed by Vlastimil Havlík (2019), who talks about similar characteristics in connection with the ANO movement. Havlík also develops the concept of technocratic populism, or of technocratic governance, which he associates with the ANO movement (Havlík, 2019). Among other things, it is characterized by centrism, ideological openness and anti-political rhetoric (Havlík, 2019; similarly see Giglioli, Baldini, 2019).

The technocratic rhetoric of the ANO movement favours “expert” solutions to problems; the movement itself relies on the person of a leader who, in the logic of his reputation as a successful businessman, wants to run the state as a (family) business (Babiš, 2017). Political debate and political problem-solving tend to be assigned negative connotations, they are referred to as ineffective (Havlík, 2019). Experts from the business sphere, who are presented as a contrast to standard politicians, are often called in to solve problems (Havlík, 2019).

This rejection of politics as a conflict of ideas and the idea that there is only one correct and effective way of managing politics, which takes over centralized practices from business, is the essence of post-democracy. External actors enter the political structures, who with their anti-political approach push the conflict outside the standard political framework and reduce the sphere of the political with their rhetoric and activity; at the same time, the drive for centralized decision-making and state management, identified as the opposite of classical politics, helps suppress critical voices (Havlík, 2019).

5. CONCLUSIONS

The final statement thus appears to be justified, that if we perceive post-democracy as a state caused by the absence of certain features in the liberal democratic regime, we can also respond more easily to the absence of these features and aim for their addition – this can then take place with respect for the context of the emergence of this state in each individual political municipality in which it occurs. We have shown above that Crouch's "historical" method of the concept of post-democracy is not suitable for application to the Czech context, due to its anchoring in the different historical development of the Western European environment, on which Crouch bases his concept. In contrast, the concept of post-democracy of J. Rancière appears to the authors to be suitable for application to the Czech environment. This concept is not conditioned by a specific historical context, but is based on the current socio-political setting and analysis of the behaviour of actors present in the political sphere.

We have also shown above that there are actors in the Czech environment who bear certain post-democratic characteristics; however, their very existence is not in itself a confirmation that we can speak of Czech politics or society as post-democratic; after all, that was not even the goal of this text. However, if we recognize that we are in a post-democratic state, and if we want to look for a way out of it, referring to the above, it is not appropriate to look for this way in history, as it would follow from Colin Crouch's concept of post-democracy. We have to discover the way out of the post-democratic state ourselves.

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MORAL PANIC, NARRATIVITY, AND AGONISTICS

The subject of the article is the analysis of the moral dimension of moral panic. The current research on moral panic is led by two approaches, processual and attributional. However, the moral dimension of moral panic is addressed in both only marginally. We intend to show that analyzing this concept in isolation from its moral dimension gives an incorrect impression that its cognitive and normative aspects may be treated as separate. We believe that the concept of moral panic when abstracted from the language of valuation, loses its theoretical potential. When analyzed across the full spectrum of its actual contexts and from the perspective of moral vocabulary, moral panic retains its theoretical relevance. Since each new form of political hegemony, violence, and other oppressive actions against the subaltern groups often resort to instigating moral panic, the concept can be usefully applied to their analysis and critique.

Keywords: moral panic, narrative, moral regulation, epistemic injustice.

1. INTRODUCTION

The aim of the article is not so much to revise, reappraise, or reformulate the concept of moral panic, but rather to reaffirm its moral dimension which, in the mainstream analysis, has been largely overlooked or sometimes even intentionally omitted. For this reason, this article aligns especially with the position of C. Critcher (2008; 2009a), who argues that a significant limitation in the current understanding of moral panic is not the lack of tools to explore its attributes, but the failure to recognize it as a form of “moral regulation” and a “discursive event” linked to the ethical dilemmas of political communities (Wright Monod, 2017). Adopting the perspective of moral panic as an instrument of moral regulation, we view this phenomenon as an operational process for managing core normative and moral rules, not only to maintain community cohesion and social stability but also for „the production, reproduction, and transformation of codes for everyday living that legitimize and naturalize different ways of being human” (Valverde 1994, after Hier, 2016). Given the nature of the concept, we propose also to include in the analysis of moral panic the ideas A. MacIntyre and M. Fricker. MacIntyre’s social theory and moral philosophy (2007) may help us understand both the nature and functions of this phenomenon. Similarly useful may be the perspective of epistemic injustice introduced by

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Fricker (2007; 2013). Her perspective may serve to unify various facets, dimensions, and practices of moral panic while also encompassing a wide range of topics and research contexts in the debate on the phenomenon.

2. MORALITY AND COMMUNITY

MacIntyre's leading idea is to indicate the relationship between community and tradition. According to his conception, tradition is a set of modes and ways through which members of a given community understand and narrate the practices in which they engage. To put it briefly, the community is the carrier of tradition, and tradition is the guide of the community. Practices are sets of activities established within a given community aimed at achieving various goals, temporal and mundane, but also lasting and significant, serving the survival of the community and contributing to its self-understanding. An important element of MacIntyre's understanding of practice is the awareness of their practical activities. That awareness finds expression in the narratives. "[W]e all live out narratives in our lives and because we understand our own lives in terms of the narratives that we live out that the form of narrative is appropriate for understanding the actions of others. Stories are lived before they are told – except in the case of fiction." (MacIntyre, 2007). It is in their narratives that people tell themselves about what they intend to achieve, how they wish to do so, how they succeeded, and also how they failed in their endeavours. It is an important fact that people do not always achieve their intended purpose. Failure may be a failure to observe the moral and practical rules of a community, but also they may mean that the thus-far effective rules of practical action have failed. For a community to survive, it must make an effort to understand why it succeeded thus far and why it now failed. The narratives built with such a task in mind, are an integral part of the tradition of a given community. However, a community is not always able to construct a narrative or a story that would win the approval of all its members. In such circumstances, there emerges a confrontation between the supporters of competing narratives. In fact, MacIntyre claims that such rivalry is constitutive of a given community. A community exists insofar as there is a dispute within it about what the community is to be. "[W]hen a tradition is in good order it is always partially constituted by an argument about the goods the pursuit of which gives to that tradition its particular point and purpose" (MacIntyre, 2007). Community is therefore by its very nature agonistic. "A living tradition then is an historically extended, socially embodied argument, and an argument precisely in part about the goods which constitute that tradition." (MacIntyre, 2007). When such an internal dispute abates or dies out, can be seen as evidence of the fading of the sense of identification of the individuals with the community they belong, a sense which thus far has united them. Yet a community may also disintegrate and fall apart when the dispute between opposing factions within it inflames beyond the level that allows them mutually to understand each other or even to communicate.

In his diagnosis of the nature of contemporary moral disagreements, MacIntyre elaborated on their three main features which are pertinent to the discussion of moral panic. First of them is the fact that participants in such debates adopt mutually incommensurable concepts which make it impossible for them to find a common language. The untranslatability and incommensurability of their moral vocabularies are responsible for the "shrill tone of so much [today's] moral debate" (MacIntyre, 2007). The shrillness of such voices demonstrates a deep commitment to given sets of values, and at the same time a sense of helplessness in convincing others to one's belief. The second feature of

contemporary debates is that even though their participants usually present themselves as impersonal and rational, the debates are nothing but “just a clash of antagonistic wills, each will determined by some set of arbitrary choices of its own” (MacIntyre, 2007). The third feature of contemporary disagreements is that each side of the debate seeks to legitimize their mutually “incommensurable premises of the rival arguments deployed in these debates [by] a wide variety of historical [authorities]” (MacIntyre, 2007).

Being an expression of sincere moral concern, such debates, when heightened, may transform this concern into a moral panic. In this way, what begins as a genuine moral issue may deteriorate into moral condemnation and degenerate into mechanisms of manipulation aimed at eliciting obedience and subservience instead of a genuine partner-like argument and dialogue.

The function of moral panic is typically to create emotional pressure on the community by its dominant factions, compelling alignment with their side to maintain control. In this context, moral panic can be viewed as a symptom, deliberate creation and also a product of internal tension within a political community, which threatens to fracture it from within, while also serving as an attempt to prevent such a rupture.

In other words, it is a mechanism of moral regulation. Although this mechanism of manipulation and imposition of one’s will on another is well-known and well-diagnosed, it continues to retain its effectiveness. And it is precisely its effectiveness that is the reason why the episodes of moral panic are so frequent and regular in modern societies.

3. EXPLORING MORAL PANIC: KEY LINES OF RESEARCH

The concept of moral panic has been present in the social sciences for over half a century. The term, first introduced by M. McLuhan³ is well-established as an analytical category, though it was revised, left abandoned, revived, and substituted by more suitable concepts such as, for example, social control or culture wars. Interestingly, it appears that the more the limitations of this concept have been pointed out within academic circles, the more popular it has become in public discourse.

The conventional approach to moral panic refers to a sudden, excessive, and negative concern about particular groups and forms of behaviour perceived as threats to existing, social values and stability, structures of control and order. Within this framework C. Crichter (2008) identifies two main explanatory paths. One of them, which constitutes the first wave of research on the issue (Cohen, 1972; Young, 1971; Hall, Critcher, Jefferson, Clarke, Roberts, 1978) is processual, and focuses primarily on the causes and consequences of labelling in a specific manner some designated groups of people or phenomena. Specifically, it focuses on the social and cultural construction of responses to events perceived as threatening to the community⁴. Within this framework, moral panic is

³ M. McLuhan in *Understanding Media: The Extensions of Man* (1964), but it was S. Cohen, in *Folk Devils and Moral Panics. The Creation of the Mods and Rockers* (1972), put moral panic on the map of social science. Along with J. Young’s *The Drugtakers: The Social Meaning of Drug Use* (1971) and *Policing the Crisis: Mugging, the State, and Law and Order* (1978) by S. Hall, C. Critcher, T. Jefferson, J. Clarke, and B. Roberts, this body of work laid the foundation for ongoing scholarly debate on the phenomenon (Wright Monod, 2017).

⁴ The nature of moral panic and its processual character is neatly summarized in oft-quoted citation from Cohen (1972): “[s]ocieties appear to be subject, every now and then, to periods of moral panic. A condition, episode, person or group of persons emerges to become defined as a threat to societal values and interests; its nature is presented in a stylized and stereotypical fashion by the

conceptualized as a combination of three main processes: exaggeration and distortion, symbolization, and the prediction of consequences if no action is taken (Cohen, 1972). In S. Cohen's view, such events are unintended and unanticipated (Wright Monod, 2017), whereas, according to S. Hall et al. (1978), they represent an ideological event through which a specific crisis is constructed, controlled, and managed (Wright Monod, 2017).

Another line of investigation, representing the second wave of research (Goode, Ben-Yehuda, 1994; McRobbie, Thornton, 1995; Thompson, 1998; Ungar, 2001), is attributional in nature, and it focuses on identifying and revising the key characteristics that define moral panic. This research is conducted with the understanding that moral panics occur in an environment marked by rapid changes in communication tools, as well as social, economic, and technological transformations. These shifts are often seen as contributing to the creation of a society shaped by fear and risk (Ungar, 2001; Crichter, 2011, Wichłacz 2017) and to the increasing normalization of media-induced panics (McRobbie, Thornton, 1995). The diversity, scale, and intensity of these processes on individuals and communities contribute to the phenomenon of moral panic to be revived.

Crichter (2017) identifies three significant similarities and three key differences between the approaches discussed. The shared insights include (i) viewing moral panic as an extreme version of broader societal processes; (ii) a recurring feature of modern society that influences law and state institutions, and (iii) recognizing its core function as reaffirming the fundamental values of society. The differences between the processual and attributional approaches center on the role of media in shaping moral panics (whether it is strategic or more passive), the primary agents of social panic (state agencies, politicians, and legislators vs. claims-makers), and the language used (ideological discourses vs. claims-making rhetoric).

The mainstream of moral panic research has been subjected to extensive criticism and revisionist approaches. Core characteristics and assumptions of traditional models have been debated and challenged, including the notion that disproportionality and irrationality are essential elements of moral panic (Waddington, 1986), the view of moral panic as primarily a mechanism to protect social cohesion and legitimize normative boundaries imposed on society (Garland, 2008), the unified concept of "folk devils" (McRobbie, 1994; Crichter, 2011), the exclusion or marginalization of non-classic, non-hostile reactions to moral panic (Hsu, 2014; Pearce, Charman, 2011, after Zielińska, Pasamonik, 2021), its strong normative connotations that ultimately frames moral panic as an intellectual project that promotes anti-conservative political agenda (Best, 2011, Carlson, 2016).

Among the various efforts to broaden the theoretical reformulation and expansion of the concept of moral panics, several approaches can be distinguished. These include the introduction of the concept of polarizing moral panic (Zielińska, Pasamonik, 2021), the proposal to incorporate issues of legitimacy (McDermott, 2013) and charismatic agency (Josse, 2018) into the moral panic framework, the situating of moral panic within a broader

mass media; the moral barricades are manned by editors, bishops, politicians and other right-thinking people; socially accredited experts pronounce their diagnoses and solutions; ways of coping are evolved or (more often) resorted to; the condition then disappears, submerges or deteriorates and becomes more visible. Sometimes the object of the panic is quite novel and at other times it is something which has been in existence long enough, but suddenly appears in the limelight. Sometimes the panic passes over and is forgotten, except in folklore and collective memory; at other times it has more serious and long-lasting repercussions and might produce such changes as those in legal and social policy or even in the way the society conceives itself'.

structural perspective, viewing it as part of routine moral regulation practices aimed at maintaining hegemonic power dynamics (Cricher, 2009; Hier, 2002, 2008; Rohloff, Wright, 2010) and also civilizing/decivilizing processes, involving the regulation and redefinition of the self and/or others to mitigate the negative social effects of heightened crises (Rohloff, 2008, 2011a; Rohloff, Wright, 2010; Hier, 2016). There is also recognition of the possibility of “good”, progressive, and socially desirable moral panics (Cohen, 2002; Hier, 2017)⁵.

4. MORAL PANIC AS MORAL REGULATION

Within conventional approaches to moral panic research, the role of language as an instrument for constructing social problems is recognised, but not necessarily regarded as a central category. The narrative nature of moral panic goes beyond simple labelling and stigmatisation; it shapes the very foundations and principles of public debate. When understood as a form of moral regulation, moral panic is not merely a contingent, episodic, or extraordinary event characterized solely by irrational reactions or actions (Hier, 2016). Rather, it constitutes „a formative process in ongoing moral regulation process” (Hier, 2016).

Moral regulation processes “involve practices whereby some social agents problematise some aspect of the conduct, values or culture of others on moral grounds and seek to impose moral regulations on them” (Hunt, 1999).

Moral regulation should not be confused with traditional concepts of social control, which focus solely on punishing others’ behaviour, nor with ideological regulation that serves to mask specific sets of economic or political interests. Moral regulation is a transformative process that alters not only the behaviour but also the identity of those being regulated. It may also indirectly influence the regulators themselves (Hunt, 1999; Critcher, 2009). At its core, moral regulation projects aim “to effect changes in the conduct and ethical subjectivity of individuals” (Hunt, 1999; cited in Critcher, 2009), reveal the identity and drive the ethical self-formation of both the regulators and the regulated (Hier, 2002).

Moral regulation projects are not necessarily fixed strategies, they can take various forms and encompass different contents, they “form an interconnected web of discourses, symbols and practices exhibiting persistent continuities that stretch across time and place” (Hunt, 1999) – “there is no inherent limit on the scope of moral regulation” (Cricher, 2009). Such a web is embedded in the antagonistic nature of human communities, whose unity and continuity are inseparably linked to differing assumptions about the shape of the community.

5. MORAL PANIC: ANTAGONISM AND AGONISM

Moral panic arises from the antagonistic nature of human communities, whose unity and survival are inherently tied to the functioning of differing assumptions about the shape of the community. The formation of a collective subject is always associated with the establishment of antagonistic and exclusive boundaries between “us” and “them” (Mouffe, 2005). In her analysis of contemporary politics, Ch. Mouffe observed that

⁵ For a comprehensive and in-depth review of developments in moral panic studies see (Smoczyński, 2016).

What is happening is that nowadays the political is played out in the moral register. In other words, it still consists in a we/they discrimination, but the we/they, instead of being defined with political categories, is now established in moral terms (Mouffe, 2005).

Setting such boundaries also enables the constitution of the identity of the subjects. “They” are both the condition of the possibility of a given social order and the condition of its impossibility. Entangled in the dialectical relationship of being an element of the excluded and exclusive order, they strive to destabilize or overthrow it. In other words, the establishment of a “we” necessarily depends on the type of “those” from whom “we” will be distinguished. This means that depending on the way in which “them” are constructed, the features of “us” and possible different types of we/them relations are revealed. Antagonism is expressed in the struggle to hear and recognize the voice of someone who has not participated in the discussion so far or has not been heard enough. It is usually an act of exclusion. Agonism is not fulfilled through exclusion, it is a positive recognition of otherness. The phenomenon of moral panic overcomes the inclusion constitutive of agonism in favour of exclusion, thus transforming it into antagonism (More on this topic in: Drałus, 2012). Radicalization is very often associated with a growing sense of threat, which is often imaginary. It is usually expressed using simplified linguistic structures, so it becomes a simple message with a strong emotional impact capable of eliciting a sense of fear. For example, a belief in an imminent danger caused by the evil that lurks in strangers, spread in the language of hate, triggers, in turn, the need for its genuine personified identification and then annihilation. In social and political practice, it means actions leading to the selection of a deviant, the so-called folk devil, as a scapegoat⁶. In this way, the indicated evil – the other – becomes a catalyst for negative emotions growing in society due to various internal and external causes, e.g. failures and frustration. The most common effect of social stigmatization is the exclusion of the stigmatized person or group from the society.

The mechanism of designating “deviants” is a factor initiating the phenomenon of moral panic. Such individuals or their groups are unequivocally and indisputably ascribed the status of outsiders, the “others” with whom we have no common features and do not share any values. Their “otherness” is understood in absolute terms, as a complete

⁶ K. Thompson identifies five phases of the moral panic process: 1) The initial definitions phase – a specific person, event, or behaviour is identified as a danger to society. Social evil is personified in the form of deviants – “folk devils” – who pose a threat to social norms, values, and interests. 2) The labelling phase – the process of escalating social anxiety by presenting (usually in media) a stereotypical and stylized image of the deviants, who are assigned typical “labels” based on their appearance, behaviour, beliefs, lifestyle, etc. 3) The phase of heightened anxiety – intensified public reactions (increasing number of television debates, discussions on social media, etc.). 4) The reaction phase – a broad public debate unfolds, involving social authorities, members of the public, and “claims-makers”, both individuals and institutional players, who often adopt the role of “moralists” Especially the latter emphasize the need to strengthen social control in order to restore social order, which, in their view, aligns with the expectations of the majority of citizens. Their actions take the form of a more systematic, long-term “moral crusade” aimed at completely eradicating deviance and restoring the moral order. 5) The phase of reducing social tension – the moral panic recedes and quiets down. It may result in permanent changes, such as institutional or legislative reforms, but it can also fade away without leaving any trace (Thompson, 1999; Zielińska, 2004).

separation from the “social, moral and cultural universe of ordinary, decent people” (Greer, Jewkes, 2005). The concept of the “folk devil” appears – a figure “that society erects to show its members which roles should be avoided and which should be emulated (...) visible reminders of what we should not be” (Cohen, 2002). Such a figure becomes the antithesis of decency, righteousness, social order, security and stability. It personifies and symbolizes evil, “an object onto which collective fears are projected – a monster of human imagination” (Wargacki, 2009).

What is specific in the dynamics of moral panic is the lack of connection between the act committed by the individual and the status of a deviant. The direct cause of recognizing someone as a deviant lies in the public reaction to a given act. A behaviour is marked as deviant *ex post*, following the imposing rules and sanctions on the perpetrator. The status of a deviant is given to the one to whom such a label has been effectively attached. This imposed status quickly becomes permanent and dominant, while all others are subordinated to it. As a consequence, it becomes the identifier of the entity (Becker, 1966).

In the scientific discussion on the problem of designating the “folk devil”, interesting questions arise about why some but not some other acts or phenomena are recognized by the environment as deviant. Therefore, the centre of analysis should not be the deviant act itself, but rather the social audience as the fundamental variable of the research because it decides whether a specific behaviour is to be marked as deviant.

6. TWO INJUSTICES, TWO WRONGS

A theoretical framework for analyzing moral panic may not be complete without categories that enable it to capture the harmful consequences of such panic. The harm affects in particular individuals or groups labeled as folk devils. What is interesting in this context is that the harm is inflicted by the instigators of the moral panic, who accuse the targeted individuals of causing harm themselves.

To capture some aspects of the problem one may turn to the idea of epistemic injustice proposed by Fricker (2007). As she claims, “any epistemic injustice wrongs someone in their capacity as a subject of knowledge, and thus in a capacity essential to human value” (Fricker, 2007). It seems incontestable that in the case of moral panic injustice, harm and violence emerge already at the stage of formulating discriminative categories. Their impact is most painfully experienced by people without power. The ability to establish and perpetuate discriminative categories lies outside the dominated groups. In opposition to them, people or groups in power have the appropriate tools to express their particular interests in universally sounding and thus compelling terms. Verbal stigmatisation of the victim initially causes symbolic harm, which subsequently turns into physical harm. Analyzing the consequences of producing harm and marking those those subjected to it in the process of moral panic complements the issue of epistemic injustice.

Epistemic injustice assumes two forms. The first, testimonial injustice, is a type of injustice expressed with various levels of credibility. “Testimonial injustice happens when a speaker receives a deficit of credibility owing to the operation of prejudice in the hearer’s judgment” (Fricker, 2013). It appears when the prejudices of the listeners cause them to attribute a lower level of credibility to the speaker’s words. In other words, testimonial injustice is a systemic underestimation of the credibility of a person’s statement due to an existing prejudice against them. “Prejudice can prevent speakers from successfully putting knowledge into the public domain reveals testimonial injustice as a serious form of unfreedom in our collective speech situation” (Fricker, 2009). This is due to unequal power

and the language which promotes inequality. It is the language of labels, prejudices, stereotypes, and all performatives employing which narratives about people are imposed from the perspective of one's own interests, and without taking into account the interests of these people.

The second type of epistemic injustice, hermeneutical one, refers to "significant area of one's social experience obscured from collective understanding owing to a structural identity prejudice in the collective hermeneutical resource" (Fricker, 2007). It thus implies the subject's systematic and persistent (Fricker, 2007) ability to interpret the social world, and in particular to interpret one's own social experiences in an adequate way. It occurs when a group is marginalized and its members cannot participate in the social processes of creating meanings that are necessary for them to interpret the social world. Hermeneutical injustice therefore indicates a conceptual void in the social system of meanings, an inability to name in the public language some experience, and an incorrect interpretation of this experience. It makes it impossible to understand the experiences of a group of people which leaves an unexplained gap in their collective imagination. Hermeneutical injustice arises from an unconscious deficit of a common language; unable to find adequate words, its users involuntarily repeat the harmful content embedded in it (Fricker, 2007). Symbolic harm thus causes real harm, even if is not socially appreciated because of the lack of an adequate name for it or the lack of an adequate non-harmful interpretation. It may happen that most sensitive individuals will be able to notice this problem and make an effort to fill the conceptual gap, develop names for the harm done, and also eliminate erroneous judgments about wronged persons and actions towards them. Epistemic forms of injustice hurt the subject's participation in political life: they reduce the person's ability to express their agency and co-shape the social processes concerning them. Such phenomena have their source in unequal power and the language it promotes.

The concept of epistemic injustice enables one to distinguish two types of wrongs, primary epistemic wrong from secondary practical wrong (Fricker, 2007). The epistemic wrong is the inadequate presentation of a given group of people in the social reservoir of meanings, and its exclusion from participation in the social creation of meanings. The secondary wrong is the loss of faith in one's own ability to understand the world and also social exclusion.

Primary wrong resulting from a conceptual gap can make someone's experience incomprehensible to society. The lack of adequate categories makes it impossible to express one's experiences in a comprehensible way (Fricker, 2007). Suppressing internal tension, pain, lack of understanding and other destructive consequences leads to secondary practical wrong, such as fear, shame, masking, denial, and auto-aggression, which in turn deforms the process of identity formation.

The above enables one to make subtle comparisons between moral panic and moral regulation. They seem to have two key features in common. Each of them involves one set of people who try to act on the basis of the behaviour of others. In both cases, regulators confirm their identity, even when they try to change others. However, the differences are no less significant. First, moral panic does not require any "reform of the character of moral deviants" (Hier, 2002), but only direct and coercive intervention. Second, moral panic involves a much sharper distinction between innocent victims and guilty perpetrators than is the case in moral regulation. They appeal to the moral economy of harm: the idea that some are harmed by the actions of others. Moral panic is thus a temporary rupture in the routine process of moral regulation, occurring "at the moment when moral regulation is perceived to be in a state of failure or disorder" (Hier, 2002). Moral panic is thus "an

unstable local manifestation of what might otherwise be considered a global project of moral regulation” (Hier, 2002, emphasis in original).

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STATE INSTITUTIONS IN THE FIGHT AGAINST THE NEGATIVE EFFECTS OF GAMBLING IN POLAND

The objective of this paper is first to present the problem of gambling in Poland and its scale over several years. The study also presents activities undertaken by state institutions to help combat gambling addiction as well as to eliminate entities offering illegal gambling services from the market. It focuses on the Fiscal Administration, which controls this area of activity, and the National Health Fund, which, through financial outlays and therapies provided, helps the addicted to overcome their addiction to gambling. The article employs a research method that synthesizes literature analysis and knowledge from the author's professional experience. The latest, previously unpublished statistical data obtained from the Ministry of Finance and the Ministry of Health is also presented.

Keywords: gambling, addiction, e-gambling.

1. INTRODUCTION

The term gambling is most often identified with a form of entertainment, satisfying both the emotional and financial needs of a person. Casinos, roulette, slot machine parlours, nightlife, and money are the main attributes associated with this phenomenon. In addition, in Polish, the term gambling is often used in the context of certain activities or decisions involving substantial risk taking (e.g., investing in the stock market), but not involving the practice of games of chance.

Long-term gambling, both legal and illegal, can cause serious risks at various levels, because a seemingly innocent game, combined with accidental winning of a certain sum of money, can be the beginning of the process of gambling addiction. The danger associated with electronic gambling is also worth emphasising, as it relates to complete anonymity, constant and easy access to casinos or other online games (including for children and young people) and the lack of time pressure. The consequences of such an addiction can often be disastrous for the addict and their loved ones. They can lead to a debt spiral, resulting in problems with creditors, loss of employment, family breakdown and even to the risk of an attack on one's own life.

Gambling addiction is a behavioural disorder of an addictive nature, unrelated to the intake of psychoactive substances (Rowicka, 2015). The well-known addictions to such substances such as alcohol, drugs, narcotics, or legal highs have been joined by so-called behavioural addictions, which, in addition to pathological gambling, include workaholism,

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shopaholism, sexaholism or computer, telephone or Internet addiction. These addictions have a negative impact on society and are the source of many other pathological phenomena.

From a criminological perspective, it can be hypothesised that gambling is often linked to criminal activities, either because these activities are a consequence of a primary addiction to gambling or, conversely, criminal activities may be based on or use gambling as an opportunity to conceal illegally acquired wealth. The gaming market is nearly always associated with big money, which is a consequence of the presence of illegal activities in this sector, often carried out by organised criminal groups. Profits derived from gambling are very often invested by members of these groups in further crime, including gambling (Dudek, Danilewicz-Dudek, 2022). In addition, illegal gambling activities offer great opportunities for so-called 'money laundering,' which are the profits from broadly unlawful activity, as it allows the sources of these funds to be disguised and put into legal circulation. Illegal gambling is also an area of common crime such as drug trafficking, theft, assault, robbery, or usury.

Polish government institutions, in their task of protecting against the dangers posed by gambling addiction, focus on preventive and control activities, which are mainly manifested in the regulation of the gambling market and the prevention of related addictions.

2. GAMBLING IN THE POLISH LEGAL SYSTEM

Control activities undertaken regarding the functioning of the gambling market, broadly defined prevention of addiction to these games is a multi-faceted area of activity of public institutions and other entities whose tasks focus on verification of the activity of entities offering services in this area. The legal basis for these activities is regulated in a number of legal acts, particularly in the Act on Gambling of 19 November 2009, which has been amended several times².

In the Polish legal system, the following types of gambling are classified as gambling games under the cited Act: games of chance, betting, card games and games using automatic machines. According to its wording:

Games of chance are games for winnings of money or goods, whose outcome depends on chance and the conditions of play are laid down in the rules. These are:

- Draw-based games – games in which winnings are obtained by correctly selecting numbers, signs or other distinguishing features, and the amount of winnings depends on the total amount of stakes paid; as well as the draw-based game keno, in which winnings are obtained by correctly selecting numbers, and the amount of winnings is the product of the stake paid and the multiplier established for the individual degrees of winnings;
- Monetary lotteries – games in which one participates by purchasing a ticket or other evidence of participation in the game and the lottery organiser offers only monetary winnings.
- Telebingo game – a game in which one participates by acquiring a token of participation in a game containing random sets of numbers or signs from a predetermined set of numbers or signs, carried out on a nationwide scale with the

² Gambling Act of 19 November 2009, formerly the Gaming and Betting Act of 29 July 1992.

draw being broadcast as a television broadcast, and the entity organising the game offers winnings in cash or in kind;

- Cylinder games – games where players participate by predicting numbers, signs, or other distinguishing features and where the amount of winnings depends on a predetermined payout ratio and the outcome of the game is determined by a revolving device, or cylindrical games operated on these principles over the Internet;
- Dice games;
- Cash bingo game – a game in which one participates by acquiring random sets of numbers from a predetermined set of numbers and the operator of the game offers only cash winnings, the amount of which depends on the total amount of stakes paid;
- Raffle bingo – is played by purchasing random sets of numbers from a predetermined set of numbers and the operator offers only winnings in kind.;
- Raffles – where participation is through purchase of a ticket or other evidence of participation in a game and where the entity organising the raffle offers only winnings in kind;
- Promo lotteries, in which one participates by purchasing a good, service, or other evidence of participation in the game and thereby participates free of charge in the lottery and the entity organising the lottery offers winnings in cash or in kind;
- Audio-text lotteries – in which one participates through paid:
 - telephone calls,
 - sending text messages using the public telecommunications network.

By contrast, pari-mutuel betting is betting on cash winnings, which involves guessing:

- results of sporting competitions between humans or animals in which participants pay stakes and the amount won depends on the total amount of the stakes paid - totalizators;
- the occurrence of various events, including virtual events, in which participants pay stakes and winnings depend on an agreed ratio between the bettor and the depositor - bookmaking.

Slot machine games are games on a mechanical, electromechanical or electronic devices, including a computer, and games corresponding to the rules of slot machine games organised via the Internet for winnings in cash or kind (renewal of a game without paying the stake or starting a new game by using winnings in kind obtained from a previous game) where the game contains an element of chance. Slot machine games are also games on mechanical, electromechanical or electronic devices, including computers, as well as games corresponding to the rules of slot machine games organised via the Internet for commercial purposes, where the player has no possibility of obtaining winnings in cash or in kind, but where the game is of a random nature.

Card games include blackjack, poker and baccarat when played for prizes in cash or kind.

In the aforementioned games, where the outcome is uncertain, the obtaining of monetary winnings or other prizes in kind is based on a random event. It is this randomness, also known as fortuity, which constitutes the fundamental characteristic of gambling. This element is contrasted with the skill of the participants in the game. Interfering with the randomness of the devices offering this type of game leads to a great deal of abuse and does not translate into the player's dexterity or psychomotor and intellectual capacity, which can best be illustrated by the example of slot machines. The player's task on this

type of device, after depositing an appropriate amount of money (coins or banknotes) and selecting a game and a stake, is to press the button responsible for starting the reels or circuits, giving an impulse to set them in motion. If the randomness of the game is interfered with, the number of spins and the moment when the reels stop or when certain winning systems are arranged, depending on the type of machine, are decided by the software, which acts as a random generator, and the result is determined by the software itself. In these games, the participant does not have the possibility to manually obtain favourable arrangements of symbols giving the expected winnings according to the pay table for the game. It is also possible to play the game in an automatic form, where the reels or hands start and stop automatically without the player's participation, until the points are exhausted, or the player switches off this function.

The games listed in the Act may cause serious risks at various levels, both for individuals and society, thus harming the public interest. The social and legal regulation of activities related to the gambling market seems to be justified from the point of view of the protection of minors from gambling, persons addicted to gambling and entrepreneurs who depend to some extent on this economic level for their business activity. The organisation and operation of this type of games is very profitable, which results in a high level of interest on the part of persons hoping to make a quick and substantial profit. It should be noted that gullibility and the desire to recover the money invested by the gambler is the main source of profit for the owners of premises offering the opportunity to take advantage of gambling and the entities arranging and intermediating this procedure. For many gamblers, addiction causes social and family problems and can lead to criminogenic behaviour such as fraud, theft, or forgery (Hörnle, 2010).

3. GAMBLING CONTROL SYSTEM IN POLAND

The state, through established and specialised services, is taking measures to combat illegal gambling. Officers of Customs Offices, as financial pre-trial investigation authorities, until the end of February 2017 undertook investigation and prosecution actions not only against persons who organised and conducted illegal gambling and participated in such games, but also against those who contributed to and enabled the illegal procedure, e.g., by providing premises and services, etc. Since 1 March 2017, Heads of Customs and Tax Offices have taken over the tasks in this area.

Figure 1 shows the effects of control activities conducted by the customs authorities in the period from 2010 to April 2017 and the National Fiscal Administration in the period from April 2017 to 2022, which continued activities aimed at combating fiscal offences involving the illegal organisation of gambling games. Activities conducted in cooperation with the Police, the Central Bureau of Investigation of the Police, the Internal Security Agency or the Border Guard were geared towards revealing the practice of organising illegal games on slot machines or their unauthorised possession. These activities included, inter alia, organisation of illegal games with the use of electronic media and organisation of games on traditional (classic) slot machines. These actions resulted in the detention of the machines, the fining of the owner of the premises and the gambler or the initiation of fiscal proceedings. In connection with the fact that in many cases gambling machines in these premises were the main 'driving force' behind their operation and thus the leading source of revenue, tax inspections were also conducted to verify the correctness of tax settlements on this account.

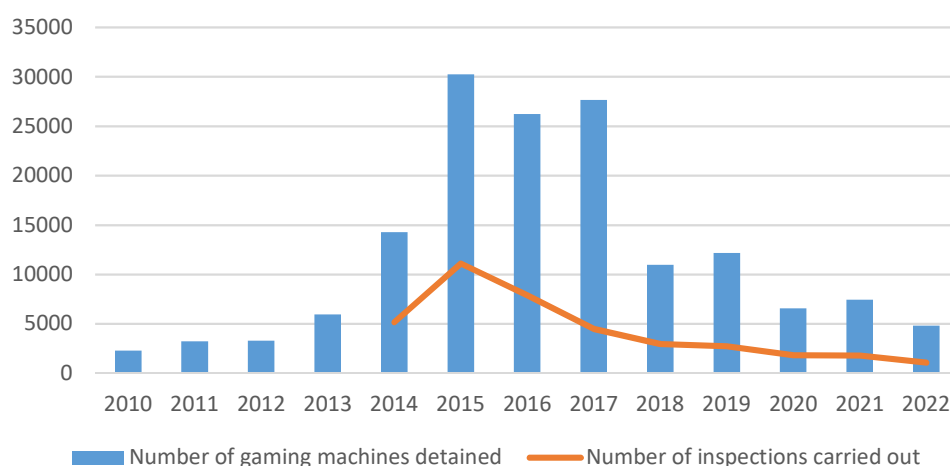


Figure 1. Numbers of decisions issued between 2017 and 2022 imposing monetary penalties under Article 89(1), para. 1–4.

Source: own elaboration based on data obtained from the Ministry of Finance.

From the author's professional experience, one of the areas of illegal machine gaming was the one related to the use of electronic media imitating FOREX market investment, which flourished between 2014 and 2017. These devices, via Internet connections, under the guise of playing on the foreign exchange market, allowed participants to play slot machine games within the meaning of the Gambling Act, analogous to traditional gaming machines. Ordinary computer monitors or notebook computers were also revealed in the premises, on which graphics with gambling games were made available via websites, and the replenishment of gaming points (after the cash had been handed over to an employee) took place by adding points on another computer. Another manifestation of the illegal organisation of games on slot machines was the organisation of such games with the use of traditional (classic) gaming machines, where it was possible to play for winnings in cash or in kind. Winnings were paid out by the machine itself or outside the machine, e.g., by a bartender. In addition, persons organising and operating gambling games on such machines, in order to make their operation appear legal, placed information on the machine stating that the machine is used only for fun and does not pay out winnings, or installed other elements in the machines in order to make their operation appear legal, such as a time limit, arcade elements or a knowledge element (Danilewicz-Dudek, Dudek, 2020).

The decrease in inspections conducted in premises with revealed gaming machines by officers of the National Fiscal Administration from 2018, noticeable on the chart, is a consequence of the amendments to the Gambling Act introduced from 1 April 2017 and the expansion of the catalogue of persons who may be fined for violating its provisions. Pursuant to the amended Act, a monetary penalty may be imposed on both a person organising gambling games without a licence or permit, without making a notification or without the required registration of a gaming machine or device, on a person organising games on slot machines outside a gaming casino, as well as on a participant in a gambling game organised without a licence or permit.

It should also be pointed out that there were restrictions, and thus difficulties in conducting control activities, related to the Covid-19 pandemic situation and the resulting restrictions, which affected the number of actions conducted in places where games on slot machines were illegally played.

Table 1 presents a summary of the penalties imposed by customs and fiscal officers in connection with the irregularities revealed during the inspections conducted, following the introduction of amendments to the Gambling Act after 1 April 2017.

Table 1. The number of decisions issued between 2017 and 2022 imposing fines under Article 89(1) para. 1-4

Legal basis of the decision	Article 89(1) Para. 1*	Article 89(1) Para. 2**	Article 89(1) Para. 3***	Article 89(1) Para. 4****
Number of final decisions issued in 2017	16	19	0	3
Number of final decisions issued in 2018	464	130	34	11
Number of final decisions issued in 2019	1340	68	80	12
Number of final decisions issued in 2020	1144	9	173	11
Number of final decisions issued in 2021	1253	10	196	16
Number of final decisions issued in 2022	1601	32	194	11

* a person arranging gambling without a licence, without a permit or without making the required notification

** a person prompting gambling on the basis of a licence granted, a permit granted or a notification made, who contravenes the conditions of the approved regulations, a licence granted, a permit granted or a notification made or operates games on gaming machines, a drawing device or gaming equipment without the required registration of a gaming machine, a drawing device or a gaming equipment

*** dependent possessor of premises where unregistered gaming machines are located and where catering, trade or service activities are conducted

**** sole holder of premises on which there are unregistered gaming machines and on which catering, commercial or service activities are conducted, in so far as the premises are not subject to dependent possession

Source: own elaboration based on data obtained from the Ministry of Finance.

The amount of the fine has also increased from PLN 12,000 for each gambling device (prior to the amendment of 1 April 2017) to PLN 100,000 for both the persons organising the games and those in possession of gambling devices. The fear of entrepreneurs, especially those with a gastronomic and commercial profile, who have made their business dependent to some extent on gambling, has caused some bars, restaurants, or small shops to close or limit their activities due to the threat of high penalties. The owners of premises who leased part of their premises to operators engaged in gambling gained an additional source of income from this. Often, employees of such premises settled winnings, operated gaming machines and replenished funds in the gaming machines and received appropriate remuneration. This is also the case of owners of free-standing buildings, who rented the building in exchange for renovation of the premises or its lease, in which illegal slot

machine gambling establishments were organised. An interesting phenomenon has been observed since March 2017, to circumvent the prohibitions under the Gambling Act by the organisers of slot machine games: leasing of part of the land by a number of subletting companies. As a result, a container with gaming machines was erected on the leased land; it was unmanned, camera-enclosed and entered remotely by prior telephone appointment. As a result of the inspection of such a container, it was difficult to establish the owner of the gambling machines, the owner of the container and the persons operating such 'illegal gambling parlours.'

4. GAMBLING OVERUSE DISORDER AS A BEHAVIOURAL DISORDER

Gambling addiction is a disorder that needs to be treated, like any other psychological addiction. What is significant about the characteristics of a gambling addict is that their life revolves around gambling, and they are unable to control their need to gamble, losing control of their behaviour and suffer harm from continuing to gamble (Jęczeń, Komsta, Sak, 2012).

This causes numerous mental health problems and results in insomnia, depression, suicidal thoughts, and attempts, reaching for psychoactive substances or alcohol. It also affects physical wellbeing, resulting in frequent headaches, neglect of nutrition or personal hygiene. It is not uncommon for addicts to lose their entire monthly income in a casino or gambling hall overnight, ignoring the need to pay off current obligations such as loan instalments, making payments, meeting the needs of a spouse or children. Often addicts borrow from family, friends, or employers, or even from high-interest lenders, pawn or sell movable property, take out mortgages on real estate or even dispose of it. Failure to repay the borrowed money has negative consequences not only for the gambler themselves, although as an addict they tend to overlook the problem, but above all for their loved ones, resulting in the loss of assets in extreme cases because of enforcement proceedings. Financial issues related to gambling translate into family and marital problems, resulting in conflicts, separations, divorces, child neglect, physical or psychological violence.

Child and adolescent gambling is a relatively new but serious problem for family life and public health. The underlying causes can be traced back to a family history of gambling or other addiction, negative peer influences, low self-esteem, a desire to prove oneself or impress peers, a lack of purpose in life or loneliness and boredom. The above-mentioned factors are not the only ones that influence gaming addiction in young people, as each type of addiction is an individual story with different origins of initiation. A good relationship between parents and children allows them to react quickly to the first signs of gaming addiction, as the effects of gaming addiction are not as measurable and visible as with other addictions such as drugs or alcohol. Often, however, work, career and the pursuit of money means that parents compensate for the lack of time by buying their children electronic gadgets, e.g., mobile phones or tablets that facilitate access to diverse types of gaming.

Pathological gambling in the ICD-10 (International Codes of Disorders) classification in force in Poland until 2018 is listed among behavioural disorders under the number F63.0 within disorders of habits and drives (impulses). It refers to frequent, repeated episodes of gambling that dominate a person-patient's life, leading to a violation of norms and social, material, professional and family obligations. In the subsequent 2018 version of this classification (ICD-11), gambling has found its place among behavioural addictions as 'gambling use disorder' (Gambling disorder – 6C50) and 'gaming disorder' (Gaming disorder – 6C51).

In Poland, pathological gambling is diagnosed when a person has been diagnosed with at least three symptoms from the following list during the past year:

1. a strong need or feeling of compulsion to gamble.
2. subjective perceptions of difficulty in controlling gambling behaviour, i.e., impaired control over abstaining from gambling and the amount of time spent gambling.
3. experiencing, anxiety, irritability or lower mood when trying to stop or reduce gambling, and the disappearance of these states when returning to gambling.
4. spending more and more time gambling to obtain the satisfaction or well-being previously obtained in a shorter period of time.
5. progressive neglect of alternative sources of pleasure or previous interests in favour of gaming.
6. continuing to gamble despite the harmful consequences (somatic, psychological, and social) known to be associated with spending time gambling (Woronowicz, 2001).

The rapid growth of the gambling market in Poland has given rise to worrying phenomena in health care, as patients with a gambling problem have started to present themselves to outpatient clinics for alcohol dependence (Grant, Kushner, Kim, 2002). Figure 2 shows the value of reimbursement provided by the National Health Fund for the treatment of people diagnosed with pathological gambling.

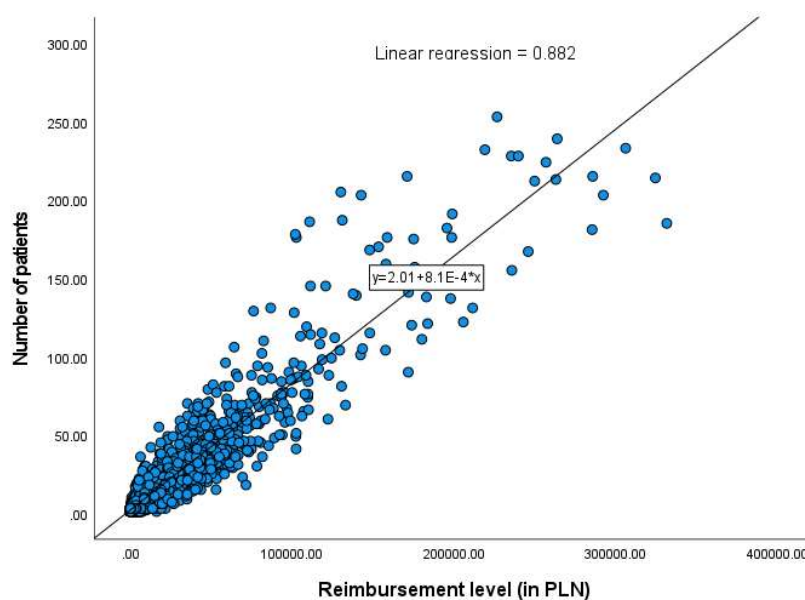


Figure 2. Reimbursement level in the 2010–2022 period

Source: own elaboration based on data from the National Health Fund.

Figure 2 shows a statistically significant ($p < 0.05$) correlation between the number of patients and the value of the reimbursement provided by the National Health Fund for the treatment of people diagnosed with pathological gambling. The correlation is very strong (0.939).

Table 2. Number of patients and value of reimbursement of services provided by the National Health Fund for the treatment of gambling addicts in 2010–2022 – descriptive statistics

	N	Mean	Median	Standard deviation	Minimum	Maximum
Number of patients	2 634	16.22	5.00	29.18	1.00	253.00
Value of services reimbursed (in PLN)	2 634	17 542.20	4 552.00	33 834.61	0.00	331 627.00

Source: own elaboration based on data from the National Health Fund.

Gambling addiction manifests itself as a behavioural disorder, i.e., it concerns the way in which one functions in everyday life. The most disturbing symptom of this addiction is, primarily, the constant need to experience strong tension caused by the unpredictable outcome of the game. Both winning and losing motivates the addicted person to continue playing, with the aim of playing back or continuing the good streak and winning again (Marlatt, Baer, Donovan, Kivlahan, 1988). The result of such behaviour is usually a deepening of the addiction and its evolution into further stages. This type of addiction is subject to treatment, and once the type of gambling addiction is diagnosed, the appropriate treatment method is selected. The process begins with the professionals revealing the underlying substrate which, for addicts, is the impulse to gamble. The patient needs to be aware of the neurological and psychological basis of their problem to work on changing their thinking. It is important to develop ways of coping with stress without resorting to activities associated with the adrenaline rush of gambling. The most effective treatment for this addiction takes place in closed centres, where the patient follows a therapeutic programme to develop methods of coping with the addiction.

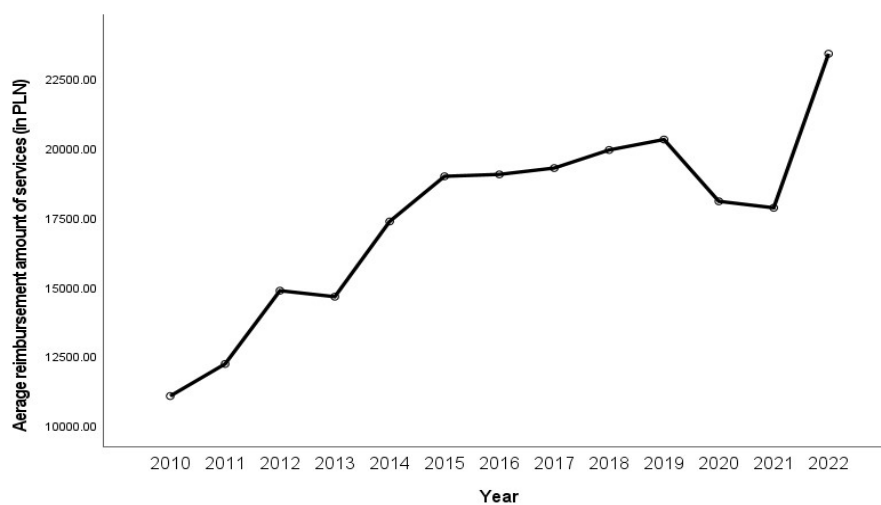


Figure 3. Amount of reimbursement (PLN) for persons treated for gambling addiction between 2010 and 2022

Source: own elaboration based on data from the National Health Fund.

In Poland, treatment of gambling disorders takes place in outpatient settings, i.e., in outpatient clinics or hospital day wards, as well as inpatient facilities. Therapeutic interventions are financed by the National Health Fund, various foundations operating in addictions and by the patients themselves through commercial activities of specific centres. As can be seen from the data (Figure 3) the number of services reimbursing the treatment of gambling addicts from 2010 to 2019 showed an upward trend. However, between 2019 and 2021, there was a decrease in reimbursement for this purpose, which was probably due to the COVID-19 epidemic emergency.

Table 3 presents data on the financial resources transferred by the National Health Fund for the treatment of gambling addicts. When analysing them, a fundamental trend, i.e., a significant statistical difference, was found in the reimbursement value of services reported with the main diagnosis F63.0 between 2010 and 2022. The average reimbursement value of services was lowest in 2010 and highest in 2022. The differences between individual years were found to be statistically significant ($p < 0.05$).

Table 3. Value of reimbursement of services provided by the National Health Fund for the treatment of gambling addicts in the 2010-2022 period – descriptive statistics

Year	N	Mean	Standard deviation	Minimum	Maximum
2010	186.00	11051.85	22474.79	0.00	175793.00
2011	193.00	12205.40	22477.54	0.00	153472.00
2012	193.00	14840.92	28584.12	15.00	199059.00
2013	200.00	14624.63	26466.10	0.00	198678.00
2014	199.00	17330.86	31707.23	40.00	249956.00
2015	212.00	18953.89	36467.73	0.00	306198.00
2016	220.00	19022.45	36763.94	0.00	285839.00
2017	213.00	19251.12	36843.81	0.00	292413.00
2018	210.00	19900.32	38628.89	26.00	285470.00
2019	202.00	20277.53	38903.62	0.00	324570.00
2020	205.00	18053.88	33919.76	0.00	256985.00
2021	197.00	17821.78	33992.44	0.00	245993.00
2022	204.00	23363.11	42061.25	0.00	331627.00
Total	2634.00	17542.20	33834.61	0.00	331627.00
F=2.021; p=0.019					

Source: own elaboration based on data from the National Health Fund.

Widespread access to gambling, coupled with the high proportion of people who report taking up various forms of gambling, poses a serious challenge to the public health sector. Offers of assistance for people with gambling-related disorders can be found, among others, in the National Health Programme (annex of the Regulation of the Council of Ministers on the National Health Programme for 2021–2025). These include those financed by the Gambling Resolution Fund at the disposal of the Minister of Health, which is administered by the National Centre for Counteracting Addictions. These activities cover such areas as social prevention, rehabilitation, and social reintegration of persons with gambling disorders, reduction of social and health damage, training of persons implementing social prevention activities, psychotherapy, or gambling operators. In addition, they include publishing materials and publications, concerning behavioural

addictions, organising conferences, and supporting scientific research (Piasecka, Szwejka, Nastazjak, 2022).

The analysis of data on persons treated for gambling-related addiction (Figure 4) shows that the largest increase in their number occurred in the years 2013–2017. The introduction of internet terminals using the CSANI platform on the market contributed to this. Devices of this type suggested the possibility of participating in the currency options market consisting in buying – selling currencies or entering future contracts (Politowicz, 2020).

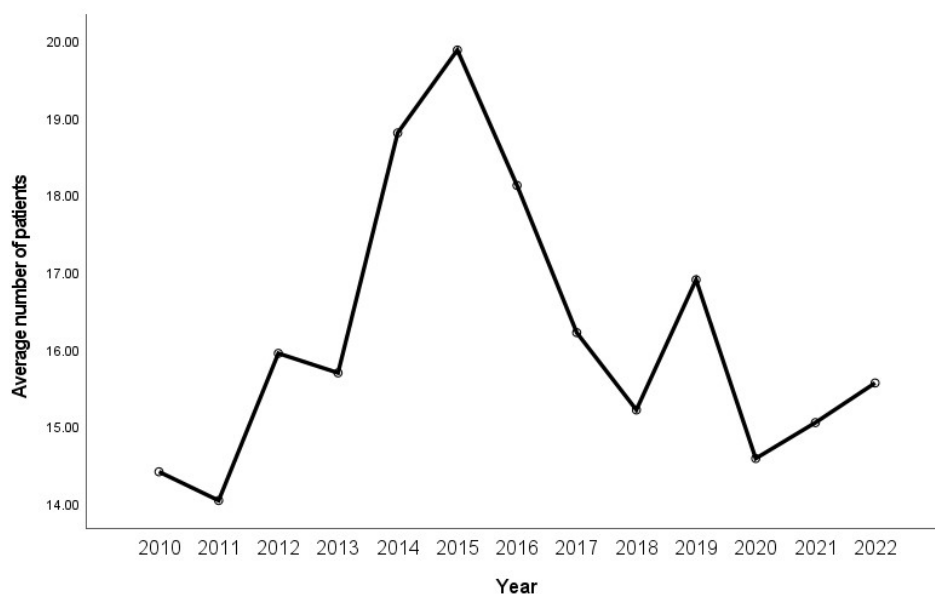


Figure 4. Number of persons treated for gambling addiction in the 2010–2022 period

Source: own elaboration based on data from the National Health Fund.

In addition to the gaming machines creating the illusion of participation in the currency market, the flourishing of illegal e-gambling has had a significant impact on the growth of gambling addiction. Ease of access, anonymity, limited control, or the ubiquity of online gambling, as well as the speed and detail of betting are the main attributes of this form of gambling. Actions taken by the appointed authorities to control games offered online resulted in the blocking of websites offering gambling and gambling casinos by the minister responsible for public finance, who maintains a register of domains used to offer gambling in contravention of the Act (register available at hazard.mf.gov.pl). The entry of a domain name in the register results in an obligation on the part of telecommunications undertakings to block access to a website using such a domain name, while on the part of payment service providers to cease providing payment services on a website using a domain name entered in the register (Frąckowiak, 2018).

On 12 February 2018, the web domains www.csani.com and csani.com, using the websites <http://www.csani.com> and <http://csani.com> to arrange games on the Internet, were entered in the Register of Domains for Offering Gambling Games in Contravention of the Gambling Act, referred to in Article 15f(1) of the Gambling Act.

Table 4. Number of gambling addicted patients in the 2010–2022 period – descriptive statistics

Year	N	Mean	Standard deviation	Minimum	Maximum
2010	186.00	14.40	27.21	1.00	205.00
2011	193.00	14.03	25.14	1.00	170.00
2012	193.00	15.94	28.72	1.00	191.00
2013	200.00	15.69	27.30	1.00	176.00
2014	199.00	18.79	33.66	1.00	212.00
2015	212.00	19.87	35.31	1.00	233.00
2016	220.00	18.11	32.89	1.00	253.00
2017	213.00	16.21	29.47	1.00	232.00
2018	210.00	15.20	28.47	1.00	239.00
2019	202.00	16.89	30.28	1.00	228.00
2020	205.00	14.58	25.24	3.00	224.00
2021	197.00	15.04	26.05	3.00	228.00
2022	204.00	15.55	26.67	3.00	213.00
Total	2634.00	16.22	29.18	1.00	253.00
F=0.759; p=0.693					

Source: own elaboration based on data from the National Health Fund.

Analysis of the data available to the National Health Fund (Table 4) showed no statistically significant differences ($p > 0.05$), in terms of the number of patients for whom services with the main diagnosis F63.0 were reported, in the period 2010–2022. Yet, that the above data refer only to those patients who undertook treatment in institutions aiding in gambling addiction treatment. However, the scale of the problem is much larger. As presented in research conducted by the Centre for Public Opinion Research, only 11% of gambling addicts undergo treatment (CBOS, 2015). Therefore, it can be hypothesised that the number of compulsive gamblers is ten times higher than the number of those undergoing treatment, which should induce relevant institutions to undertake activities aimed at fighting this addiction in a broad sense, including prevention in this respect.

5. CONCLUSIONS

Gambling has negative individual, environmental and civilisational consequences. Effective mitigation of the negative consequences associated with gambling in its broadest sense requires consistent action at all levels, from governmental to local. Despite the large outlays allocated by the National Health Fund for projects targeting gambling addicts and the activities of various institutions assisting persons addicted to gambling, the possibility to obtain large winnings in a brief period invariably attracts people to this type of games. What is noteworthy is that operators participating in the gambling market, despite the existing legal restrictions, focus primarily on large profits, without considering the negative social or health consequences of gambling addiction for gamblers.

While land-based entities offering diverse types of gambling are controlled by authorised services and eliminated from the gambling market sector, e-gambling is a virtual, cross-border phenomenon, which makes it difficult to locate. As a result, the enforcement by the state of domestic legal regulations on Internet gambling faces a number of difficulties, which makes it much easier for operators to organise illegal e-gambling. It

is therefore necessary to continuously monitor the developments in online gambling and to improve tools to combat this area of cybercrime.

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LEGAL ACTS

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THE FRENCH STANCE TOWARDS THE POLISH PEOPLE'S REPUBLIC FROM THE ELECTION OF FRANÇOIS MITTERRAND TO THE LIFTING OF MARTIAL LAW AS ASSESSED BY POLISH DIPLOMATS

This article aims to explain and assess how Polish diplomacy saw the French policy towards Poland from the beginning of the presidency of François Mitterrand to the suspension of martial law (1981–1982). It evaluates the reactions of the French state and the Socialist Party, the French Communist Party, and the French public opinion. The French state – adhering to the political principles of Charles de Gaulle – was faced with a real conundrum: what policy to pursue when it came to the Polish crisis? Conflicting interests made it act indecisively. Its policies and motives were all closely observed by the Polish diplomacy. This article further proves that Polish foreign policy, though not sovereign, was not ideologically driven (besides official declarations) as the assessment of the French foreign policy demonstrates.

Keywords: France, Poland, martial law, François Mitterrand, Wojciech Jaruzelski, public opinion.

Following the imposition of martial law, the French government adopted the most critical stance towards Poland among all Western European countries. This position is largely consistent with that of the United States.

A. Naworyta

1. INTRODUCTION

In the last few decades, a relatively large number of studies have been written on how the French reacted to martial law in Poland (Heruday-Kielczewska, 2012; Heruday-Kielczewska, 2015; Pleskot, 2013a; Pleskot 2013b; Frybes, 2010; Chwalba, 1997; Gebert, 1991; Korolko, 2019). However, no research has been published on how France's attitude towards Poland was perceived among Polish diplomats. This article aims to address this gap and to analyse how Polish representatives assessed French policies towards the Polish People's Republic and the attitude of the French Communist party, which had a significant

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influence on the French-Polish relationship given its participation in the French administration (Jarosz, Pasztor, 2008). The study will cover the period from the election of François Mitterrand as President on 10 May 1981 to the lifting of martial law on 31 December 1981 (however, it will not cover assessment of French reactions to lifting of martial by Polish diplomats). In particular, it shows how far Polish diplomats' perceptions of France were ideologically biased and how far they differed from reality. Numerous scholars have argued that it was in post-1956 Poland that the process of dismantling totalitarianism was most evident, with policies becoming less dogmatic and principled, less dependent on "ideological constraints", and more pragmatic (Walicki, 1996; Duraczyński, 1997)². The tentative conclusion is that the diplomatic analysis appeared to be matter-of-fact and sober, free of ideological considerations. The article has been based on analyses, notes, and correspondence of Polish diplomats, including employees of the Warsaw Ministry of Foreign Affairs and diplomatic missions in France. These sources are kept in the Archives of the Ministry of Foreign Affairs and the Archive of Modern Records in Warsaw.

2. FROM THE ELECTION OF FRANÇOIS MITTERRAND AS PRESIDENT TO THE DECLARATION OF MARTIAL LAW

On 10th May 1981, François Mitterrand, the chairman of the Socialist Party, won the second round of the presidential elections. Mitterrand had a rich political history, having served as a minister during the Fourth Republic and having run for president twice before (in 1965 and 1974). Mitterrand's victory came as a surprise to many countries, who had expected Valéry Giscard d'Estaing to be re-elected (Heruday-Kielczewska, 2012; Szeptycki, 2005; Favier, Martin-Roland, 1990). The socialist president was expected to make significant changes to foreign policy, following his criticism of de Gaulle's assumptions, which had been the basis for the French strategy in the past³. After the June parliamentary elections, the government was joined by communist ministers, causing concern among Western countries (Heruday-Kielczewska, 2012). The future direction of France's both internal and external policies appeared uncertain.

Regarding the presidential election, Polish diplomats highlighted the factors that contributed to Mitterrand's victory, including the deteriorating economic situation in France. This involved specifically the increase in unemployment, inflation, and slowdown of industrial development. In addition, Giscard d'Estaing's relationship with the Central African emperor Jean-Bédél Bokassa had contributed to a compromising situation known as the diamond affair, and the much-criticised policy of privileged relations between the Fifth Republic and the USSR was still in place despite the collapse of détente in East-West relations. In particular, Giscard d'Estaing was criticised by Mitterrand and Jacques Chirac for meeting Leonid Brezhnev in Wilanów. Ultimately, the neo-Gaullists of the Rally for the Republic (RPR) allowed their voters to "vote freely in the second round, which

² Andrzej Walicki pointed to the swift rejection of totalitarianism due to the fact that Poland had not become a fully totalitarian state (Walicki, 1996).

³ These fears turned out to be unfounded because Mitterrand, like de Gaulle, saw the future of Europe in close Franco-German cooperation; he sought close cooperation with the Soviet Union, although this was initially impossible, and a break with the Yalta system; he did not fundamentally change relations with the United States either (Szeptycki, 2005). Both the USA and the USSR preferred Giscard d'Estaing because they knew what they could expect from him (Favier, Martin-Roland, 1990).

determined the election results” (Olechowski [1981, 14 May]. [Urgent note...]. 45/84, Fr. 2412, AMSZ, Warszawa, Poland). Importantly, this was a factual and objective assessment of the situation, which historians now agree upon (Bozo, 2019; Titley, 2002; Heruday-Kielczewska, 2012)⁴.

Tadeusz Wojciechowski, the former ambassador to France and then deputy minister of foreign affairs, predicted that Mitterrand's foreign policy may differ from that of his predecessor in many aspects. He stated that

Mitterrand will pursue a more European policy, in favour of integration, and a more Atlantic one, despite his anti-American rhetoric. The privileged relationship between Paris and Bonn will be maintained. [...] Regarding East-West relations, particularly in the area of dialogue and cooperation with the USSR, M. [itterrand] will aim to maintain France's current active policy. However, his stance on Middle Eastern affairs, Afghanistan, China (potentially using China as leverage in relations with the USSR), and human rights could complicate and restrict these relations.

The Minister predicted that relations with the Polish People's Republic would be good, although slightly worse than before, and that there would be greater difficulties for Poland to receive loans (Olechowski [1981, 14 May]. [Urgent note...]. 45/84, Fr. 2412, AMSZ).

The accuracy of the aforementioned forecasts should be considered high when one considers the turning point that was the declaration of martial law. Polish diplomats concluded in their subsequent analyses that

the emerging positive feelings towards the government and parties in our country are, however, weakened by continuing negative assessment of real socialism in Poland and other socialist countries, as well as by vigorous promotion of their very own model of «democratic socialism».

Although the French promised to provide economic aid, this was conditional on “the continuation of the «renewal project»”, i.e. introducing reforms and agreements between the government and the opposition. According to Polish diplomats, the architects of the French policy perceived Poland was still ahead of other Eastern Bloc countries in terms of progress. They were pleased to hear that Prime Minister Pierre Mauroy was scheduled to visit Poland. According to Polish diplomats, Mauroy's importance in France's semi-presidential system was greater than that of his predecessors (Korczewski [1981, 22 June]. [Memorandum. Official statements of French administration regarding Poland]. 45/84, Fr. 22, AMSZ, Warszawa, Poland). Additionally, it was claimed that “discussions at both government and party level have shown that our affairs draw considerable international

⁴ The diamond scandal involved accepting a very expensive gift of diamonds from the bloody dictator Jean-Bédél Bokassa. During the election campaign, the president sold the diamonds and donated the money to the Central African Red Cross, but the damage to his image remained (Titley, 2002). Valéry Giscard d'Estaing antagonised the right wing by pursuing liberal policies, e.g. on abortion (Heruday-Kielczewska, 2012). In the tradition of French policy going back to de Gaulle, Giscard d'Estaing, after the collapse of the period of détente in international relations, persistently sought dialogue with the Soviet Union in order to avoid a clash of powers. To this end, a secret meeting was planned between the French president and Leonid Brezhnev in Wilanów. The results of this meeting were unsatisfactory, and the French president was accused by French and world public opinion of breaking transatlantic solidarity (Jarosz et al., 2008).

attention. There is a growing understanding that stabilising the situation in Poland may also potentially lead to détente and maintaining peaceful order in Europe". Several politicians in power in France and the Federal Republic of Germany believed that "Solidarity does not motivate people to work and therefore only aggravates the already difficult situation". This was viewed as an opportunity to exert pressure on Western politicians and trade unions associated with Solidarity. These, in turn, were expected to influence the Polish trade union to "rise to a position of cooperation and shared responsibility for resolving the country's pressing issues". The author of the note observed that the French positively evaluated the 9th Congress of the Polish United Workers' Party as well as the actions the party and the government had been taking towards Solidarity (Czyrek [1981, 20 August]. [Urgent aide-memoire for interviews with P. Mauroy, the French Prime Minister, J. Delors, the Minister of Finance and Economy, as well as G. Plissonnier, a Politburo member and the secretary of the Central Committee of the French Communist Party, and C. Germon, the national secretary of the Socialist Party, on 17 August in Paris, and with H.D. Genscher, the Minister for Foreign Affairs, H.J. Wischnewski, the vice-chairman of Social Democratic Party of Germany, and H. Mies, the chairman of the Communist Party of Germany, on 18 August in the Federal Republic of Germany]. 45/84, Fr. 22, AMSZ, Warszawa, Poland). It should be noted though that not every speech presented to the Congress exhibited conciliatory tendencies or the need for reforms⁵.

The French statements were linked to Mitterrand's conviction that the international situation made it impossible for Poland to leave the Soviet sphere of influence quickly, and that he therefore preferred the resolute attitude of the Polish United Workers' Party towards Solidarity to an invasion by Soviet troops. The latter would have been a tragedy because it would have led to hostile relations between the West and the East. Similarly, during a conversation with Lech Wałęsa, Minister Cheysson emphasised that France "respected Poland's geopolitical situation". Thus, a much hoped-for compromise agreement between Solidarity and the Polish communists was regarded as the optimal outcome. The French applauded the actions of the Polish authorities that were leading to it, but acknowledged that it was not an easy task (Pasztor, Jarosz, 2015; Attali, 2005; Pleskot, 2013b)⁶.

The comment by Polish diplomats on Mitterrand's pro-Atlantic attitude is remarkable. Subsequent analyses have identified the sources of pro-Atlanticism in the inclusion of four communist politicians in the government and in the implementation of a socio-economic

⁵ The desire to reach an agreement and to emphasise the need for reforms was evident in the speech of Deputy Minister Mieczysław Rakowski, who, however, was short on specifics, apart from the need to introduce a more "authentic" concept of the National Unity Front and the need to introduce workers' self-government. In other speeches, the criticism was more pronounced, in particular against the radical part of Solidarity (e.g. the speech of Stanisław Kania). The final resolution adopted at the Congress can hardly be called revolutionary (Holzer, 1984). Years later, Minister Józef Czyrek recalled a conversation with Prime Minister Pierre Mauray in August 1981, during which the Prime Minister of the Fifth Republic said that "the left [...] considers Poland to be a leading country in democratic changes and in the policy of rapprochement with the West [...]". The Polish minister was very pleased with this meeting (Czyrek, 2012).

⁶ Even before the elections, socialists saw the changes in Poland as the beginning of a pluralistic society that could bring both parts of Europe closer together. This did not mean that the Yalta-Potsdam agreements were completely scrapped. Mitterrand himself was quite skeptical about the possibility of the Polish experiment succeeding. He believed that the coexistence of the Marxist-Leninist system and institutional freedoms would sooner or later lead to confrontation (Korolko, 2019).

programme that involved greater state intervention in the economy, nationalising some industries and developing social policies which concerned Western countries, particularly the United States (Korolko, 2019; Heruday-Kiełczewska, 2012). According to a note, "the left-wing government, implementing the economic and social programme, which has been criticised by Atlanticist circles, is seeking to increase its allied credibility by strengthening military cooperation within the alliance" (Dąbrowa [1981, 2 September]). [Memorandum on the defence, disarmament and international security in the policies of the current French government]. 45/84, Fr. 2413, AMSZ, Warszawa, Poland).

As for the assessment of the French Communist Party's participation in the government, it was predicted that

the Socialist Party could benefit more from social achievements by agreeing to the joint implementation of the Mitterand line. This was because the French Communist Party was likely to receive more blame for any slow progress and there would undoubtedly be obstacles along the way" (Kaługa [1981, 1 July]. [Aide-memoire for the interview with Maxim Gremetz, a member of the Politburo and the secretary of the Central Committee of the French Communist Party on 30 June 1981]. KC PZPR Wydział Zagraniczny, LXXVI-595, Archive of Modern Records (AAN), Warszawa, Poland (page numbers not continuous).

The balance of power was assessed objectively: only four communist politicians entered the government and the joint programme declaration contained mainly socialist demands. As emphasised, Mitterrand aimed to share responsibility for reforms with the communists, with the Socialist Party controlling the government, and to neutralise the communist trade union headquarters, Confédération Générale du Travail (CGT) (Bożym [1981, 2 July]. [Assessment of the agreement between the SP and the FCP as well as the entry of communists into the government]. 45/84, Fr. 2412, AMSZ, Warszawa, Poland; Korolko, 2019; Łakomy, 2006). However, following the rejection of the policy of détente, it was concluded that the inclusion of the Communists in the government could have a positive effect on the tense international situation. It was also noted that "the French Communist Party had taken a correct stance on current events in Poland from the outset, expressing sympathy and support for the party and government in the process of renewal". It was realistically stated, that "the positive influence of communist ministers on the position of the French government on Polish affairs could be counted on to a small extent" (Bożym [1981, 2 July]. [Assessment of the agreement...]. 45/84, Fr. 2412, AMSZ).

Politicians from the French Communist Party closely monitored the situation in Poland and supported the Polish People's Republic during the "renewal process", often attributing its failures to Solidarity. The Polish side was even criticized for taking too soft a stance in their contacts with the union, and it was anticipated that a confrontation would occur sooner or later. The Polish government should consider whether "Solidarity supports progress, i.e. socialism, or opposes it, and whether Solidarity supports adequate market supply or opposes it" (Marcinkowski [1981]. [Aide-memoire for the meeting between comr. J. Głowczyk and comr. R. Leroy, a member of the Politburo of the Central Committee of the French Communist Party responsible for ideological matters, the Executive Director of "L'Humanite" and "l'Humanite Dimanche", on the jubilee of "l'Humanite" on 12 September 1981]. Foreign Affairs Department of the Polish United Workers' Party, LXXVI-595, AAN). The French Communist Party had also observed a concerning shift in the attitude of Solidarity, which aimed to seize power in Poland (Fronczek [1981, 18

September]. [Aide-memoire for the meeting between comr. J. Głowczyk and Maxim Gremetz on 13 September on the jubilee of “l’Humanite”]. Foreign Affairs Department of the Central Committee of the Polish United Workers' Party, LXXVI-595, AAN, Paris, France). But Polish diplomats rightly noted that the party was rather reluctant to speak clearly about the situation in Poland because of domestic issues and its alliance with the Socialist Party. Speaking to Ryszard Wojna Gremetz, a member of the Communist Party Political Bureau, said he would not have wanted to be in Poland at the time martial law was declared (Wojna [1981]. [Aide-memoire for the interview with comr. Gremetz, a member of the Politburo of the French Communist Party on 24 October in Valence, at the French Socialist Party Congress]. Foreign Affairs Department of the Central Committee of the Polish United Workers' Party, LXXVI-595, AAN).

The French Communist Party, led by Georges Marchais, identified itself as part of the Eurocommunist movement that emerged in the aftermath of the Prague Spring (Kershaw, 2018). Throughout the 1970s, parties across Western Europe distanced themselves from the Soviet Union, criticising its domestic and foreign policies as well as those of other socialist countries, rejecting Leninism and advocating the introduction of socialism by parliamentary means (Opiola, 2018). Unlike the Italian Communist Party, which consistently and severely criticized the policies of the USSR and the Eastern Bloc countries, the French Communist Party followed the principle of *L'Unité dans la diversité* – unity in diversity. This allowed for numerous variations of a socialist state without imposing a single pattern (Curtois, Lazar, 2022)⁷. Thus, the Polish socialist system received support rather than condemnation, though, as can be seen, not an uncritical one. The presence of communist ministers in a government dominated by socialists who were strong supporters of Solidarity prevented them from openly expressing their position.

3. THE FIFTH REPUBLIC AND THE DECLARATION OF MARTIAL LAW

The introduction of martial law by the regime of General Wojciech Jaruzelski elicited strong reactions from Western countries. Initially hesitant, governments began to protest more forcefully, although individual responses varied widely. From the outset, Western public opinion reacted strongly to news of the restriction of civil liberties in Poland. Crowds gathered outside the embassies of the Polish People's Republic, and numerous Solidarity support committees were established to provide moral and financial support for oppressed Poles (Paczkowski, 2021; Kastory, 2019; Jaworski, Kamiński, 2013; Frybes, 2010).

French public opinion reacted violently to the introduction of martial law. According to Andrzej Chwalba, “France became a never-ending show of support for several weeks” (Chwalba, 1997). Initially taken aback by what was happening in Poland, the French Government failed to know how to react. The first statement made by the French Minister of Foreign Affairs, Claude Cheysson, was deemed very unfortunate. He expressed surprise at the introduction of martial law but when asked if the French government would take any action, he replied, “Of course not. We won't do anything” (Heruday-Kiełczewska, 2012;

⁷ In view of the above, it should be noted that Eurocommunism was a very diverse phenomenon. Relations with the Polish United Workers' Party and the Communist Party of the Soviet Union deteriorated considerably during the FCP's transition to Eurocommunism. The Polish United Workers' Party was also criticised by the FCP for maintaining close relations with the French government of Giscard d'Estaing, who was ruthlessly attacked by the French Communists (Jarosz et al., 2008).

Pleskot, 2013a; Pleskot, 2013b). However, under the influence of American pressure and public opinion, subsequent statements by French politicians condemned the Polish People's Republic and the USSR. In general, the French policy towards the Polish People's Republic and the USSR was inconsistent. It was a combination of strong anti-communist rhetoric and a reluctance to take action. While speaking out more boldly against these communist countries in international forums such as the EEC, the International Labour Organisation and the Socialist International, France was reluctant to impose economic sanctions, despite US pressure (Pleskot, 2013b; Korolko, 2019)⁸.

Initial assessments of how Western countries reacted to martial law were optimistic. Foreign Minister Józef Czyrek noted the “balanced position” of the West, excluding the United States. However, the situation quickly changed, and the influence of the United States and public opinion led to a tougher stance on the part of Western countries after 16 December, in the wake of the Wujek mine massacre. “The international situation has developed unfavourably”, the minister concluded (Paczkowski, 2021). In the case of France, Polish diplomats noted a split in the Ministry of Foreign Affairs between those who favoured a tough approach towards Poland (the European Department), which was expressed in interventions at international forums, and those who were more “down to earth” (e.g. Minister Cheysson). According to Jan Padlewski, a Polish diplomat in Paris, France was implementing a “carrot and stick” policy (Padlewski [1981, 19 December]. [Aide-memoire for the meeting between comr. Padlewski and Mr Puisais on 18 December]. Foreign Affairs Department of the Central Committee of the Polish United Workers' Party, LXXVI-595, AAN, Paris, France). The “stick” referred to the actions taken against the Polish state in international institutions, while the “carrot” was the calmer tone and conciliatory conversations between French and Polish diplomats. For instance, in a later conversation with Minister Claude Cheysson, Ambassador Eugeniusz Kułaga was assured of France's willingness to “resume the dialogue” (Korolko, 2019). Eventually, a division of roles within the ruling camp became apparent. In January, Polish diplomats noted that “the Socialist Party and the trade unions under its influence, the Ministry of Foreign Affairs and Prime Minister Mauroy took an extreme position, whereas President Mitterrand and his advisers exhibited a more balanced one” (Noworyta [1982, 21 January]. [Memorandum

⁸ France was reluctant to impose economic sanctions for fear of undermining the sovereignty of its foreign policy. The break with the Yalta order was a matter of dialogue rather than excessive confrontation with the Eastern bloc. There were also economic arguments. Shortly after the declaration of martial law, France signed a contract with the Soviet Union for the supply of Russian gas. Prime Minister P. Mauroy justified this decision by saying: “We cannot impose sanctions on ourselves [...]. We need Soviet gas” (Korolko, 2019). The reaction of the American government to the imposition of martial law was the most severe, both in words and in deeds. The latter took the form of quite far-reaching economic sanctions. For example, all agricultural and dairy products financed and supported by the USA were suspended, and LOT Polish Airlines' flights to the USA were stopped. Sanctions also affected the Soviet Union (e.g. suspension of licences for high-tech products). The unyielding position of the USA was intended to show the determination of the United States and not to allow the USSR to test it at other stages of the rivalry (Tyszkiewicz, 2013). No other country, not even Great Britain, adopted the harsh attitude of the United States towards the events in Poland. Margaret Thatcher did not want the sanctions to have a double-edged effect on the British economy (suspension of deliveries of equipment for the construction of the Siberian gas pipeline), and Britain did not want to drive Poland into bankruptcy. The sanctions amounted to the suspension of high-level diplomatic contacts and the refusal to grant new state loans to the Polish People's Republic (Tebinka, 2013).

on the French stance on Poland after 13 December 1981]. 8/86, Fr. 22, AAN, Warszawa, Poland). However, it is unclear for Polish diplomats whether the issue is related to the division of roles, the abovementioned “carrot and stick” policy, or a genuine difference of opinion (Noworyta [1982, 26 January]. [Urgent memorandum on the current state of affairs between Poland and France]. 8/86, Fr. 22, AMSZ, Paris, France).

It is now understood that Minister Cheysson's strong language was not always approved of by F. Mitterrand. In fact, during the January EEC session in Brussels, the minister was reportedly accompanied by the president's officials to ensure that France could pursue the more compromising policy favoured by the French president. In fact, the Socialist Party incited more radical actions (Korolko, 2019). The division of roles was, thus, unintentional. The differences of opinion may have been mixed with differences regarding political tactics or strategy. But the author of the note was right to observe that “the position of the French authorities was hesitant and inconsistent” indeed (Olszewski [1982, 21 January]. [The French stance on Poland after 13 December 1981]. 8/86, Fr. 22, AMSZ, Paris, France).

Polish diplomacy promptly recognised that December 13 marked a significant turning point in the relationship between Poland and France. Prior to this date, the Fifth Republic had been the most supportive of Poland among Western nations, as evidenced by its favourable economic policies towards the Polish People's Republic, such as granting loans. However,

following the imposition of martial law, the French government adopted the most critical stance towards Poland among all Western European countries. This position is largely consistent with that of the United States. It strongly condemns the actions of our authorities, in particular the restriction of civil liberties,

and this condemnation is expressed in speeches to international organisations and in announcements of economic sanctions, such as the suspension of loans (*ibidem*).

In 1982, Polish diplomats observed French animosity towards the Polish People's Republic, in spite of occasional improvements. “Throughout 1982, Polish-French political relations remained under the influence of France's reaction to the events in Poland in December 1981”, according to an embassy report from that year. “France decided to halt any political dialogue, both between administrations and in the Socialist Party's inter-party contacts. Alongside the USA, France took a critical and uncompromising stance towards Poland at the forum of various Western organizations. Despite suspending high-level political dialogue, the Embassy maintained intensive informal contacts with the local high-ranking administration, in particular in the initial period following the introduction of martial law in Poland. An attempt to resume political dialogue occurred during the visit of Comrade [Józef] Czyrek to France as the head of the PZPR delegation to the 24th Congress of the French Communist Party in February 1982⁹. However, the meeting of ministers was

⁹ It certainly demonstrated France's willingness to engage in dialogue with Poland. However, it was received very negatively by public opinion, which forced Cheysson to make a gesture towards the Polish opposition. A few days later, he received a delegation from the Coordinating Committee of the National Solidarity Union in France (Korolko, 2019). Czyrek officially expressed himself positively about this meeting in an interview for TF 1: “I will describe it as open, honest and, in my opinion, useful. During the meeting I stressed that French-Polish relations are special and will remain so” ([interview with Józef Czyrek, Minister of Foreign Affairs of the Polish People's Republic, on TF 1 on 4 February 1982]. Foreign Affairs Department of the Central Committee of

of a formal nature and only served to maintain the positions of both sides. The next high-level contact was the meeting between foreign ministers [Stefan] Olszowski and Cheysson at the UN session¹⁰. The conversation took place in a positive atmosphere, and the French side accepted the Polish proposal to resume the dialogue using the method of successive small steps. This indicated some possibilities of reversing the unfavourable trends in relations. However, further developments showed that the French position in Polish affairs had hardened again" (multiple authors [1982, 17 December]. [Political report of the embassy of the Polish People's Republic in Paris on the year 1982]. 8/86, Fr. 242, AMSZ, Paris, France).

It was claimed that economic relations had become politicised. Only technical-scientific and cultural cooperation maintained its quality and intensity; the cooperation was hoped to improve Poland's image in many French scientific circles (*ibidem*).

The quote provides an accurate assessment of Polish-French relations. French policy towards Poland, while similar to the American one in many aspects (except economic), aimed to establish a dialogue with the Polish People's Republic. Informal diplomatic relations were maintained at the ministerial level, while formal ones were suspended. In the face of public outcry, the French demanded that the Polish government show some goodwill by freeing the prisoners. When the Polish government did so, there were some positive words and gestures towards the authorities of the Polish People's Republic. This was also the case after the release of some internees on 22 July and after the (temporary) release of Lech Wałęsa in November (Korolko, 2019).

The Polish government reacted to unfriendly gestures such as the hostile statements made by Claude Cheysson and the sending of 10,000 balloons with propaganda material to Poland, the latter being considered "an unfriendly act against Poland, potentially dangerous to air transport and contrary to the Chicago Convention" (Bożym [1982, 22 February]. [Aide-memoire for the interview of comr. G. Bożym with T. Marcaggi, the First Counsellor of the French embassy on 22 February 82]. 8/86, Fr. 22, AMSZ, Paris, France). The improvement in relations with France was noticed by Polish diplomats not only in gestures but also, perhaps prematurely, in the conciliatory tone of the statements made by French diplomats. Any deterioration in these relations was quickly observed (Kaługa [1982, 15 May]. [message to J. Czyrek]. 8/86, Fr. 22, AMSZ, Paris, France; Wiejacz [1982, 12 June]. [Aide-memoire for the interview with Jacques Dupuy, the French Ambassador, on 11 June 1982]. 8/86, Fr. 22, AMSZ, Paris, France).

The attempt by Polish diplomacy to comprehend the reasons behind France's aforementioned policy is intriguing. Subsequent analyses have reiterated several fundamental factors influencing the French policy.

1. Public scrutiny, often presented as the most important factor.

"The reaction of the so-called public opinion in France, especially the intellectual community, to such steps is always almost spontaneous, without going into the reasons behind the concept of these steps. In this case, there was also undoubtedly sympathy for Poland. The public demonstrations and other forms of protest that took place in France were unprecedented and had a significant impact on the attitude of the government" (Noworyta [1982, 21 January]. [Memorandum on the French stance...]. 8/86, Fr. 22, AMSZ).

the Polish United Workers' Party, LXXVI-609, AAN, Warszawa, Poland. It seems, however, that he was just putting a brave face.

¹⁰ Stefan Olszowski took over from Józef Czyrek as the Minister of Foreign Affairs in July 1982.

It is widely acknowledged that public opinion played a large role in intensifying the government's rhetoric and actions against the Jaruzelski regime, as demonstrated previously. Even diplomats from the French Republic acknowledged this in conversations with their Polish counterparts (Olechowski [1982, 12 March]. [Aide-memoire for the interview with Jacques Dupuy, the French Ambassador, on 10 March 1982]. 8/86, Fr. 22, AMSZ, Warszawa, Poland).

2. **The ideologisation of French politics**, considered by some to have been a decisive factor (*ibidem*) with the Socialist Party as the driving force behind it. It involved viewing other countries through the lens of “human rights and the right of nations to self-determination, with these rights seen as the fundamental (if not supreme) principles of coexistence among states” (Olechowski [1982, 12 March]. [Aide-memoire...]. 8/86, Fr. 22, AMSZ). This translated into sharp criticism of the USSR's foreign policy (e.g. the intervention in Afghanistan) and the fight against real socialism, which was considered unacceptable (Kułaga [(1982, 30 January). [Memorandum on the current state of affairs between Poland and France]. 8/86, Fr. 22, AMSZ, Paris, Poland). To some extent, this would have been a major departure from de Gaulle's foreign policy paradigm. According to de Gaulle, relations between East and West should not be analysed in terms of competing ideologies and systems, since national interest prevailed over ideology (Pazik, 2012).

It was during this period that Mitterrand's policy became more pro-American, for the reasons given above. He still followed de Gaulle's main guidelines and believed that France's interest lay in an agreement with the Soviet Union, but he did not have the “polite” (*complaisant*) attitude towards the USSR that he had accused his predecessor of. In Mitterrand's view, closer ties with the United States were necessary for the national interest at that time. On human rights and the right of nations to self-determination, Mitterrand stressed the need to respect them, but did not make relations with other countries dependent on them. He also rebuked Minister Cheysson for making undiplomatic remarks (Favier et al., 1990; Attali, 2005). Polish diplomacy seems to have overemphasised this factor, despite its importance for the French Social Democrats (Korolko, 2019). As the Polish argued that “further normalisation of the situation in Poland could be expected to strengthen the realist tendencies in French politics” (Noworyta [1982, 22 January]. [Memorandum on the French stance on Poland after 13 December 1981]. 8/86, Fr. 22, AMSZ, Warszawa, Poland)¹¹, and thus contribute to the improvement of Polish-French relations.

3. **Shattered hopes of breaking the Yalta order**, which was supposed to begin with “building a new pluralist model [in Poland] (with meaning and influence for other socialist countries), based on a tripartite system of exercising power (Government and Party – Church – Solidarity)” (Noworyta [1982, 21 January]). [Memorandum on the French stance...]. 8/86, Fr. 22, AMSZ). As mentioned above, Mitterrand's policy relied heavily on hoping to break the Yalta order by accommodating the Soviet Union's interests (including security) in central and eastern Europe. Whether

¹¹ This was also the view of Wojciech Jaruzelski, who said: “It seems that the single most important incentive for the enemy to withdraw from the trenches of sanctions and boycotts will be our regaining political, social and economic equilibrium. One does not negotiate with a dying man, but it is worth reaching an agreement with a recovering one. That is why we must unite and concentrate all our activities in order to regain this health” (Jaruzelski [1982]. [VIII Plenum KC PZPR. Transcript of the 8th plenary meeting of the Central Committee of the Polish United Workers' Party on April 22–23]. III-143, AAN, p. 202), Warszawa, Poland).

the disappointed hopes in this regard had such a significant impact on French policy, however, is doubtful. As Polish diplomats also claimed: "In order to preserve the most important content of the renewal for the Socialist Party, France should be relatively more flexible in the practice of relations with Poland, including economic ones, than in the external framework of these relations" (Kulaga [1982, 30 January]. [Memorandum on the current state...]. 8/86, Fr. 22, AMSZ). In other words, the desire to preserve some changes in Poland could have influenced the more conciliatory policy of the Fifth Republic, which is contradicted to some extent by the previous argument.

4. **The desire to be seen as a loyal ally of the United States in its policy towards the Polish People's Republic and the USSR. This was due to the left-wing reforms in France, which were initially viewed unfavourably by the West, and the participation of communists in the government** (multiple authors [1982, 17 December]. [Political report...]. 8/86, Fr. 242, AMSZ). As shown above, Polish diplomacy identified these pro-Atlanticist sources of Mitterrand's policy very early, several months before martial law was introduced. This issue had a significant impact on French policy, especially in the harsh rhetoric used against the government of the Polish People's Republic. For example, the Polish authorities were accused of violating human rights (Korolko, 2019).
5. **The "internal" political interests [of the Socialist Party];** winning the battle over Solidarity against the Communist Party and the CGT, on the assumption that both the support of the Socialist Party and the opposition to it will seriously weaken the two (Kulaga [1982, 30 January]. [Memorandum on the current state of affairs...]. 8/86, Fr. 22, AMSZ). It is hardly rebuttable that the bitter campaign against the Polish People's Republic was also due to the internal policy of the Socialist Party.

The assessment of the conduct of the French government during the martial law in Poland was thus founded on reasonable premises. Despite the overestimation of the ideologisation of French politics, the analysis of the causes of French political behaviour was very accurate and basically free of any ideological influence. Let us now take a look at how the attitude of the French Communist Party was assessed by Polish diplomacy in 1982.

As it has been shown above, the FCP's Eurocommunism did not always imply breaking with the Soviet Union and the Eastern Bloc. When it comes to the case in question, it can even be said that the Communist Party withdrew from some views associated with Eurocommunism. At the 23rd Party Congress (1979), Georges Marchais presented an analysis the international situation, claiming the global capitalism was undergoing destabilisation, whereas communism was expanding (especially in Africa and Asia). To back up his words, the party supported the Soviet intervention in Afghanistan and opposed the installation of American Pershing missiles in Europe in response to the deployment of Soviet SS-20s. The party again largely saw the world in black and white – the belligerent West and the peace-loving Soviet Union. It is therefore not surprising that the FCP supported the imposition of martial law and did not condemn the internment of Solidarity members (Courtois et al., 2022). Marchais's initial statements were quite moderate, but there was no criticism of the situation in Poland (Heruday-Kielczewska, 2012). In a 23 December 1981 letter to Wojciech Jaruzelski, deploring the imposition of martial law, the FCP General Secretary, however, pointed out that "it is up to the working class, the Polish nation, to solve Poland's difficult and complex problems" (Marchais [1981, 23 December]. [letter to W. Jaruzelski]. Foreign Affairs Department of the Central Committee of the

Polish United Workers' Party (AAN LXXVI-595). Voices of support for Jaruzelski's regime subsequently emerged with increasing frequency. But the party was divided on this point, and roles were divided, too. The communist ministers were loyal to the government and condemned the introduction of martial law; the party authorities avoided commenting on these questions; the communist trade unions did not participate in demonstrations against the Polish government; and the party media expressed strong support for the communist government in Poland. It should be noted, however, that many communists broke with the official party and trade union line and openly supported Solidarity. In general the communists' stance also soured the relationship with the Socialist Party (Heruday-Kielczewska, 2012; Korolko, 2019; Chwalba, 1997).

The Polish authorities welcomed the reactions of the French Communists to the declaration of martial law. In particular, the warm words of General Secretary Georges Marchais were often quoted. In conversations with Polish diplomats, he pointed out that solving the problems in the Polish People's Republic was an internal matter for that country, and even did not want to agree to an appeal to the Polish government to release the internees, and "repeatedly expressed his satisfaction that the Polish government was in control of the situation (as the "maitre de la situation") and that it had chosen the best possible formula [to solve the problem]". The letter to General Jaruzelski was also well received (Szafarz [1982, 24 February]. [French Communist Party, Aide-memoire for the meeting between comr. Ambassador E. Kaługa and comr. G. Marchais]. 8/86, Fr. 2412, AMSZ). Very quickly, however, Polish diplomacy became aware of "discrepancies within the Communist Party in a spirit that was unfavourable to Poland". These were interviews given to French television by Georges Marchais (30 December) and the CPSU Minister for the Civil Service and Reform, Anicet Le Pors (1 January 1982). While the former gave a positive assessment of the decision to impose martial law, claiming that "General Jaruzelski [...], relying on the army, took a decision with the intention of establishing order, avoiding bloodshed, avoiding fratricidal war", the latter declared that "all restrictions on freedoms and rights are intolerable in Poland, as elsewhere" (Fronczek [1982, 8 January]. [An analysis of the speeches given by Georges Marchais on 30 December 1981 and Anicet Le Pors on the current situation in the country]. Foreign Affairs Department of the Central Committee of the Polish United Workers' Party, LXXVI-609, AAN, Paris, France). Still, hopes were high for FCP. It was a party that could exert a moderating influence on the attitude of the Italian Communist Party, for example, which severely criticised Polish policies (Fronczek [1982, 19 February]. [Memorandum on the 14 Congress of the French Communist Party, its course and resolutions adopted]. Foreign Affairs Department of the Central Committee of the Polish United Workers' Party, LXXVI-609, AAN, Paris, France).

In the latter half of 1982, the Polish diplomatic community noted a somewhat negative change in the Communist Party's attitude towards Polish issues, which was expressed in clear support for Mitterrand's foreign policy (the FCP did not have a direct say in foreign policy), appeals for the release of prisoners of war and the need for urgent social, economic and political reforms in Poland. It was emphasised that the FCP felt pressured to comment on the situation in the Polish People's Republic from everywhere, both from the right and from the left of the political scene (the Socialist Party and its trade unions). But it was also stressed that "The FCP presents its own opinions and comments on the solutions adopted by the Polish authorities, without directly criticising them". Instead, the Polish diplomats tried to explain why their "friend" and ally had had a change of heart (Paczocha [1982, 22 November]. [Relationship with the Communist Party of the Soviet Union and the Communist Party of China in the policy of the French Communist Party; the stance of FCP

on Poland]. Foreign Affairs Department of the Central Committee of the Polish United Workers' Party, LXXVI-609, AAN, Paris, France).

This was mainly due to internal policy problems. Firstly, they wanted to gain more influence on society, which was hostile to the Polish state. It was written:

The FCP believes that under French conditions socialism can only be built by parliamentary means, and this requires the support of the majority of society. To win this support, the model of socialism it presents must be attractive and its policies credible. If it fails to take a critical stance on issues such as the internment of some Solidarity activists in Poland, it would actually be very unfavourable for its influence in its own society and would weaken its position in the country (*ibidem*).

The desire to maintain the alliance with the Socialist Party, which at the time was politically extremely beneficial for the French Communist Party, was also at stake (Pasztor et al., 2015):

One of the main sources of this far-reaching rapprochement between the French Communist Party leadership and Mitterrand and the Socialist Party is the current dialogue between the FCP and the SP regarding next year's municipal elections. Favourable arrangements for the FCP with regard to these elections could be a precondition for strengthening the tendency to rebuild the party's position vis-à-vis other partners and to regain the weakened social trust, which is the basic goal of the FCP (Kulaga [1982, 12 June]. [Message to W. Natorf]. Foreign Affairs Department of the Central Committee of the Polish United Workers' Party, LXXVI-609), AAN, Paris, France)¹².

For Polish diplomats these reasons were crystal clear: the FCP wanted to stay in power, so it did not criticise Mitterrand's policies too much (Paczocha [1982, 26 December]. [Relationship between the French Communist Party and the Socialist Party]. Foreign Affairs Department of the Central Committee of the Polish United Workers' Party, LXXVI-609, AAN).

4. CONCLUSIONS

Polish diplomats were not overly pessimistic about François Mitterrand's rise to power, but they were not overly enthusiastic either. Although some difficulties were expected (e.g. in the granting of loans to Poland), it was generally believed that Polish-French relations would be good. They highlighted the new president's pro-Atlantic stance and insistence on respect for human rights, and therefore they feared an "ideological" policy that could affect East-West relations. The communists' entry into the government was optimistic news for the Polish side. They could influence the socialists in a spirit favourable to the Polish People's Republic. After the imposition of martial law, France – in the opinion of Polish diplomats – went from being the most sympathetic country towards the Polish Republic to the country with the worst attitude towards the Polish state after the United States. In general, this situation persisted throughout the whole year, although there were some

¹² It was not until the communists left the government in 1984 that the previously cautionary approach towards the Polish People's Republic was abandoned. Consequently, in 1985, a FCP delegation visited Warsaw (Pasztor et al., 2015).

fluctuations in Polish-French relations, urgently noted in the correspondence of Polish diplomats. It is worth noting that the reasons for France's attitude towards Poland were presented by Polish diplomats in a very professional and convincing manner, apart from the fact that Poland, in my view, over-exposed the influence of ideology on French policy. Their analysis of the behaviour of the French Communist Party, which gently admonished Poland, e.g. in the case of internees, was also realistic and factual. As a matter of fact, there was no criticism of the behaviour of the French communists, because they were the few allies the Polish side had.

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HOW AUDITOR-ORIENTED EMPLOYEE PERFORMANCE MANAGEMENT AFFECTS INTERNAL AUDIT EFFECTIVENESS BY REDUCING ITS CONSTRAINTS

This manuscript aims to determine how audit-oriented employee performance management (A-OEPM) practices influence internal audit effectiveness (IAE) mediated by internal audit constraints (IAC). The study was conducted in late 2021 by using a quantitative approach (CAWI method). In this type of practice, managers are not engaged in employee development, and they use management by objective method instead of EPM. They exclude team-oriented practices from the A-OEPM-IAE relations. Neither a job description tool nor a career development plan was used. Instead, only the practices that support up-to-date IA tasks and responsibilities are important for managerial decisions. The paper fills a gap in management literature by examining the relationships between A-OEPM, IAC, and IAE. In order to overcome the IAC, the A-OEPM could be a valuable tool to help both parties implement organizational changes necessary to achieve IAE.

Keywords: internal audit effectiveness, internal audit constraints, internal auditors, employee performance management, practices, quantitative research, Poland.

1. INTRODUCTION

The management literature defines *performance management* differently, presenting perspectives of strategy, organisation behaviours, operations management, economics, accounting and human resource management (HRM) (Hutchinson, 2013). The term *employee performance management* (EPM) derives from an HRM perspective and should be understood as continuous improvement of employee performance. EPM is an integrated process in which line managers (together with their subordinates) agree on a set of expectations, measures, and performance reviews in order to plan performance improvement and personal development and, less frequently, pay for performance (Den Hartog, Boselie, Paauwe 2004). The presented EPM concept is a set of HRM practices designed to influence individual and organisational effectiveness (Boselie, 2010).

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Through the use of EPM, cultural change can be achieved by influencing individual behavior to inhibit constraints (Armstrong and Ward 2005; Houldsworth and Jirasinghe 2006). The line managers own EPM. Their responsibility is to introduce HRM practices to create and develop employee attitudes (Atkinson, Shaw, 2006). They can also help to prevent staff from returning to previous habits and to support their newly acquired knowledge and skills (Brinkerhoff, 2006; Harrison, 2009). In this context, the need of continuous development of internal auditors is a must and derives from professional audit regulations to abide by.

In turn, internal audit effectiveness (IAE) is the outcome of the internal auditors' activities, duties, professional practices and responsibilities through a high commitment with The International Standards for the Professional Practice of Internal Auditing (further: Standards) (2016), goals, objectives, policies and procedures (Ussahawanitchakit and Intakhan, 2011). Moreover, the internal auditors work improves management processes, develops internal control system, and consequently enhances organisation effectiveness and eliminates adverse effects for a particular organisation. In accordance with management literature, the EPM system could help to achieve IAE.

However, the relationship between an internal auditor and an auditee (an audited person) is usually seen as a conflict source (Kałużny, 2008). Many internal auditors are compared to "bad police" officers who search for irregularities only (sometimes deliberately and forcefully) (Grzesiak, 2021a). Internal audit may be misunderstood in the organization due to the internal audit constraints (IAC): as for example incorrect understanding of its role or lack of recognition that it is a part of the organization (Mouri, Anderson, 2017). The EPM could overcome the IAC, too.

The paper aims to determine how audit-oriented employee performance management (A-OEPM) practices influence IAE mediated by the IAC. From the literature review we can say that very effective CAE excels at the development and mentoring of people, and has the courage to develop a talent model that goes together well with both a company's business and internal audit's vision (PWC, 2016). As a consequence A-OEPM should have advantages for both: IAE and IAC. However, there are some cases showing that the internal auditors' work does not meet the Standards' requirements (see: Stanowisko..., 2022). Contextual factors (MODs) also affect the relationships. To this end, it was necessary to build a model (A-OEPM → IAC → IAE). Consequently, the paper fills a gap in the management literature, as still very little is known about these relationships.

2. LITERATURE REVIEW

2.1. Internal Audit Effectiveness (IAE)

According to The Institute of Internal Auditors (IIA), an international organization of internal auditors, internal audit (IA) is defined as:

an independent, objective assurance and consulting activity designed to add value and improve an organization's operations. It helps an organization accomplish its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control, and governance processes (Standards, 2016).

This definition indicates not only that IA is a systematic and disciplined approach supporting the achievement of the organization's goals but also clarifies IA and its character, aims and scope.

The above definition stresses that internal audit should be independent and objective. There is a close relationship between these traits (Moeller, 2018) hence they must be considered together (Stewart, Subramaniam, 2010).

Standards (2016) define independence as: “the freedom from conditions that threaten the ability of the internal audit activity to carry out internal audit responsibilities in an unbiased manner”. Independence means that internal auditors are free to express their own opinions and provide insights based on collected and objective data, and their widely understood experience. Independent auditors must also be impartial and free from conflicts of interest (Deloitte, 2018).

Objectivity is as

an unbiased mental attitude that allows internal auditors to perform engagements in such a manner that they believe in their work product and that no quality compromises are made. Objectivity requires that internal auditors do not subordinate their judgment on audit matters to others (Standards, 2016).

According to the Standards (2016), the internal auditor should obtain substantive support and external assistance if he feels unable to provide an objective opinion (for example due to lack of competence). In order to be objective, the internal auditor's opinion must not only be independent from others' opinions, but also be performed “with faith in the results” – in the fact that internal audit can improve the functioning of the organization (Skoczylas-Tworek, 2014). An internal auditors' assessment must be preceded by consideration of all circumstances related to the case: the internal auditors establish the facts, leaving aside their own preferences at work (Standards, 2016).

In accordance with the IA definition, the IA objectives are to add value to the organization and improve the operational activities (Standards, 2016). The value added by internal audit is a measurable or immeasurable benefit to the organization. The intermediate goal of IA is to assist the management in achieving the objectives of the organization (Ruud, Jenal, 2005). In addition to these goals, the organization's management may also establish other objectives for the internal audit (Millichamp, 1996; Moeller, 2018).

It is also critical for the internal auditors to consider the expectations of the internal audit stakeholders in their work (Ahmad, Taylor, 2009). These expectations are based mainly on their particular needs and do not remain constant over time (Ngah, 2016; PwC, 2011). Grzesiak (2021b) identified the internal audit expectation gap in Poland, understood as “the extent to which the function does not meet the expectations of auditees, managers, executives, and audit committee members”.

Ridley (2008) stated that a modern internal audit is based on „3E” what means effectiveness, efficiency and economy. Lenz, Sarens and Jeppesen (2018) observed that „effectiveness is the most important of the three ‘Es’”. In addition to evaluating the effectiveness of other processes, internal audits must also be effective on their own (Arena and Azzone 2009). However, an IA definition created by the IIA does not include IAE directly (The Institute of Internal Auditors, 2011). IAE is not self-explanatory and it is defined differently by researchers (Lenz et al., 2017). Mihret, Yismaw (2007) stated that “Internal audit is effective if it meets the intended outcome it is supposed to bring about”. In turn Dittenhofer (2001) stated that “[...] it has been traditional in internal auditing that

the determination of internal auditing effectiveness can be accomplished by evaluating the quality of internal auditing procedures”.

Arena and Azzone (2009) in their discussion on IAE distinguished two groups of approaches. According to the first, it is determined by the match between the internal audit in the organization and the features of internal audit resulting from the Standards (as for example independence and objectivity). Anderson (1983), Glazer and Jaenike (1980) represent such an approach. The second approach to the effectiveness of the internal audit depends on the subjective assessments attributed to the internal audit activity in the organization by the managers of this organization. In this case an assessment of the IAE can be made also by referring to the expectations of the internal audit stakeholders (as quoted in: Cohen, Sayag, 2010).

The literature review indicates that effective internal audit can benefit a variety of activities and be useful for the organization, the internal audit department, individual internal auditors, and the audit committee (a committee of a board of directors, fundamental component of good corporate governance) (Dubis, Jain, Manchanda, Thakkar, 2010). Effective internal audit contributes greatly to the effectiveness of auditees in particular and the organization in general, as well (Dittenhofer, Evans, Ramamoorti, Ziegenfuss, 2011). In spite of the fact that it does not guarantee that all functions in an organization are functioning as intended (Winiarska, 2007), the studies have shown that IAE offers the following benefits in fraud detection (Drogalas et al., 2017), performance improvement (mainly in audited processes and areas) (Eden and Moriah, 1996). Moreover IAE is an important part of new public management (Mizrahi, Ness-Weisman, 2007), support for organizations (private and public) (Badara, Saidin, 2013, Unegbu, Kida, 2011), one of the governance basics (Rittenberg and Hermanson, 2003) and *management training ground* (Cohen and Sayag, 2010).

IAE is influenced positively or negatively by different factors (Endaya and Hanefah, 2013; Lenz and Hahn, 2015). They are mainly associated with: (1) the core of internal audit; (2) internal auditors; (3) the management staff, (4) the others IA' stakeholders, (5) internal audit department (Grzesiak, 2021a). Although studies on IAE factors are relatively common in the literature, it is stated that they have not yet been fully explored (Bednarek, 2017) – there is no consensus among researchers regarding the full catalogue of factors determining the IAE (Endaya and Hanefah, 2013). IAE may be positively or negatively affected by these factors.

2.2. Internal Audit Constraints (IAC)

Internal audit can also be perceived as an imposed activity by organizational members (Allen, 1996, as quoted in: Ma'ayan and Carmeli, 2016). Most people consider internal audit as a cost-generating activity that does not contribute to the organization's success. Internal audit is often treated as „necessary evil”, and perceived as the activity that may cause problems for others. The internal auditor is often accused of being “jack-of-all-trades” and “master of none” (Moeller, Brink, 2009). Based on a study by Gorący (2013), it was determined that non-economist students have limited experience with IA. Gorący (2013) suggests further that Polish society has a low level of knowledge about internal audit. Lange (2016) makes similar observations as well.

Internal audit conclusions and report with recommendations are presented as constructive criticism and suggestions for improving the process (Tariku, 2015). An organization's management may find them useful in the decision-making process (Moeller,

2018). Changes in processes and recommendations proposed by internal auditors in the reports may cause discomfort and fear in the eyes of auditees. It is uncomfortable for anyone to be audited. Internal auditors surveyed by Grzesiak (2021a) observed anxiety, stress, and fear among the auditees; the latter do not often perceive cooperation with the internal audit as their professional responsibility. It is said that the auditees feel comfort only at the end of the audit task, and fear is felt the rest of the time (Carmeli, Zisu, 2009). This fact is explained by Sawyer et al. (2003). In their opinion, identifying weaknesses and shortcomings indicates that internal auditors (and not those audited) are viewed positively and as the committed employees. Hence the internal auditor-auditee relationship involves “often great emotions”, generates conflict (Skoczylas-Tworek, 2014) and disrupts internal auditors’ work (Dittenhofer et al., 2011). That’s why attitudes towards internal audit(ors) are mostly negative (Grzesiak, 2021a). Sawyer et al. (2003) describe them as an integral part of the profession.

Internal auditors are expected to concentrate on process effectiveness and avoid interpersonal conflicts, auditee unique features and weaknesses. At the one hand, internal auditors must know how to treat people and converse with auditees. On the other hand, employees must be encouraged to better cooperate with internal audit staff to improve the applications of internal audit standards (Shamki, Alhajri 2017).

Internal auditor must provide assurance and consulting services which respectively derive from the control and advisory functions (Lisiński, 2011). The scope and detail of the audit task determine the resources required to perform the internal audit (Light, 1993, as quoted in: Ma’ayan and Carmeli, 2016; Moeller, 2018). In order to accomplish its objectives, the internal audit department should be equipped with adequate resources (Arens et al., 2012). However, this requirement is not always fulfilled (c.f. Grzesiak, 2021a, MacRae, van Gils, 2014, Salehi, 2016).

Internal auditor needs much more independence, but audit committee often exercise too weak power in the internal audit. There are some difficulties in applying an idealist conception of independence and hardly practicing management principles (Roussy, 2015). The IAE can be reduced by pressure on internal auditors as well (Karssing, Jeurissen, Zaal, 2017). An internal auditor should be aware that there may be a real possibility that he/she may be pressured to change conclusions at some point during his/her career. There can be not only various sources of pressure on the internal auditor (including managers at all levels or other employees) but also its different manifestations, (as for example pay cuts, transfers to other positions, terminations or being “eased into retirement”, budget cuts, exclusions from important meetings, and being ostracized by individuals in the organization) (Rittenberg, 2016). The ineffectiveness of internal auditing can be attributed to ineffective management controls that may be detrimental to the organization's objectives (Dittenhofer, 2001). Likewise, an effective internal audit requires the chief audit executive (CAE) to report to management from time to time regarding the internal audit activities, authority, responsibility and performance relative to their plan (Badara and Saidin, 2013).

2.3. Auditor-oriented employee performance management practices (A-OEPM)

EPM is a continuous process with the stages of planning, acting, monitoring and reviewing performance (Armstrong 2009; Kreitner and Kinicki, 2007). The induction and socialization stages have been added to these four stages by some researchers (Aguinis, 2009; Hutchinson, 2013). The management literature lists a widely accepted approach towards EPM practices. EPM is similar to the PDCA (Plan, Do, Check, Act) approach regarding change introduction (Armstrong, 2009) (Table 1).

Table 1. Similarity of typical EPM and PDCA practices

EPM			PDCA
Armstrong (2009)	Aguinis (2009)	Hutchinson (2013)	Miller et al. (2014)
<p>Plan</p> <ul style="list-style-type: none"> • role definition, • objectives setting, • competencies, • performance improvement plan, • performance development plan <p>Act</p> <ul style="list-style-type: none"> • carry out role • implement performance improvement plan • implement personal development plan <p>Monitor</p> <ul style="list-style-type: none"> • monitor performance • provide continuous feedback • provide coaching • deal with underperformers <p>Review</p> <ul style="list-style-type: none"> • dialogue and feedback • agree strengths • build on strengths • agree areas on improvement 	<p>Prerequisites</p> <ul style="list-style-type: none"> • mission and strategic goals • job analysis <p>Performance planning</p> <ul style="list-style-type: none"> • goals setting in terms of results and behaviors • development/ performance plan <p>Performance execution</p> <ul style="list-style-type: none"> • supervisor's observation and documentation • goals and standards updates • feedback and coaching • resources provision • reinforcement <p>Performance assessment</p> <ul style="list-style-type: none"> • results and behaviours assessment process • development/performance plan evaluation <p>Performance review</p> <ul style="list-style-type: none"> • appraisal meeting between the manager and employee to review their assessments and provide feedback (what has been done and how) • plan for the future development • pay-for-performance <p>Performance renewal and re-contracting</p> <ul style="list-style-type: none"> • goals adjustment • thinking over the previous stages 	<p>Induction and socialization</p> <ul style="list-style-type: none"> • onboarding <p>Performance planning</p> <ul style="list-style-type: none"> • clarifying role expectation • agreeing performance measures • setting objectives • formulating personal development plan <p>Counselling and support</p> <ul style="list-style-type: none"> • ongoing review and feedback • identifying poor performance problems <p>Review and feedback</p> <ul style="list-style-type: none"> • discuss progress • clarify expectations • provide feedback • give recognition • assess performance • identify development needs <p>Identifying training, development and reward outcomes</p> <ul style="list-style-type: none"> • identifying needs 	<p>Plan</p> <ul style="list-style-type: none"> • problems identification • reasoning of goals setting • current situation analysis • problems sources • improving actions <p>Do</p> <ul style="list-style-type: none"> • plan introduction <p>Check</p> <ul style="list-style-type: none"> • process and results monitoring <p>Action</p> <ul style="list-style-type: none"> • standardisation • reflection • planning for the future

Source: own work.

The CAE, who is responsible for effectively managing the internal audit activity, must develop and maintain a quality assurance and improvement program within the internal audit department in the same vein to conform with Standards (2016) for the professional practice of internal auditing. The CAE must plan objectives, tasks and manage and

periodically review for internal auditor staff. The activities go well with the EPM assumptions, presented above (Standards, 2016).

There are few papers on internal auditor-oriented employee performance management (A-OEPM) practices. They have yet to be fully recognised and deeply discussed, compared to IAE and the organisational performance level, which are widely discussed within the literature (Ernst&Young, 2008; Ziegenfuss, 2000). However, an internal auditor assists the organisation in meeting their objectives (Badara, Saidin, 2013).

Bear in mind that internal auditors act upon the internal control system and must comply with the global Standards (2016), which require them to develop an independent IA committee and IA board to support their job autonomy (Skoczylas-Tworek, 2014). This remark means that the CAE reports administrative issues to the audit committee whilst simultaneously reporting to the hierarchical structure of the organisation's general director. The Standards (2016) describe how to structure an IA department but leave the final decision in a board of directors' hands. However each organisation varies and acts upon different contextual factors, and the Standards (2016) only help to build the IA department. Nevertheless, there are no formal rules regarding IA department development and its organisational subordination in Polish private companies (Skoczylas-Tworek, 2014).

Consequently, indicating a specific internal auditor's responsibilities within the job description is challenging and ambiguous. They derive from a differentiated scope of regulations, for example the Standards (2016) and other guidelines (see Moeller, 2018), specific audit areas, for example comprehensive auditing, management-oriented auditing, financial auditing, participative auditing (see Skoczylas-Tworek, 2014) and widely accepted practices (for example studying accounting records or preparing compliance reports).

The Standards (2016) set out that an internal auditor's activity must include processes of control, risk management and corporate governance. They must keep their organisation management accountable regarding the areas mentioned above. With this in mind, an internal auditor provides assurance services and advisory activities regarding support in the introduction of post-inspection recommendations (Standards, 2016).

A wide variety of duties and tasks aforementioned above require an internal auditor to possess high professional qualifications, competencies, and an enhanced organisation status to meet different obligations (Ramamoorti, 2003). There is a wide variety of IA certificates to obtain and some of which have features of international authorisations (Skoczylas-Tworek, 2014).

Internal auditors are expected to present specific competences. They include the issues regarding how the employee precepts reality, excluding its distortion and universalism, meaning that Standards (2016) and rules must be abided by them. They should also have competences in processes or areas of aggregation, problem-solving, creativity and even fraud detection capability. Internal auditors must be: honest, brave, loyal, aware, and take quick, flexible, simple actions, able to form opinions, enthusiastic about acting, and avoid conflict of interest (Kush, 2009; Standards 2016).

Individual objectives derive from the above formal rules, IA areas dedicated to a particular internal auditor, performance requirements and IA practices. Practically, the objectives stem from the internal audit department prepared by the CAE (Standards, 2016). They must concentrate on the inputs and outputs of an open system regarding the effectiveness of the audited area (Piotrowski, 1996). Therefore, personal development and improvement plans are essential to an internal auditor's professional job. They are continuously obligated to broaden their professional knowledge regarding the Standards

(2016) requirements, to know better contextual factors, and to be well familiar with audited organisations regularly (Skoczylas-Tworek, 2014).

Supporting internal auditors by their superior in monitoring, feedback and coaching is based on strict rules within the Standards (2016). Since the CAE must develop and maintain a quality assurance and improvement program, they must conduct ongoing monitoring, which is an integral part of the day-to-day supervision, review, and measurement of the internal audit activity. Ongoing monitoring is thus incorporated into practices used to manage internal auditors. The CAE is obligated to obtain competent advice and assistance or even decline the consulting activities if their subordinates lack of knowledge and skills (Standards, 2016).

Conformance with the Standards (2016) for the professional practice of IA is essential in meeting the responsibilities of internal auditors and the internal audit activity (Bota-Avram et al., 2010). This is why the internal auditor-oriented performance appraisal (A-OPA) criteria stem from The Code of Ethics (2016) and attribute and performance standards (Standards, 2016).

In practice, some most commonly used metrics for measuring IAE at the level of internal audit departments are fundamentals of A-OPA criteria (Ernst&Young, 2008; Ziegenfuss, 2000): completed audits comparing to audit plan, length of time for issuing audit reports, results from auditee surveys, the significance of audit findings and recommendations, staff experience and education level, auditing viewed by the audit committee, management expectations of internal auditing.

However, in public sector internal audit activity regarding performance monitoring can be insufficiently developed at the level of the departments (Dascalu et al., 2016), and thus it could improperly influence A-OPA. The above remark illustrates how an increase in an organization's effectiveness can sometimes be attributed solely to the performance of the internal auditor. The internal auditor may operate effectively, but their recommendations may not be implemented. Larkin et al. (1990) indicated that gender affected internal auditor performance appraisal – male performance was rated higher than female performance. However, women earned higher grades in college, were more motivated and reported higher levels of job satisfaction.

EPM is usually seen as an approach towards individual employee performance improvement. Moreover, it is a must to consider team performance which stems from how individuals cooperate and their input towards team success (Brumback, 2003). Arena and Azzone (2009) survey emphasizes that the IAE is influenced by the characteristics of the internal audit team.

2.4. Contextual factors (MODS) and IA

Contextual factors include private and public organizations. The results of studies conducted in various countries indicate that public managers and employees perceive a weaker relationship between their work' results and remuneration, professional promotion or the sense of job security than staff corresponding to their position in the private sector (Crewson; 1997, Jin, Rainey, 2020, as quoted in: Rudolf, 2020). This perception affects their greater absenteeism, weaker work commitment and lower work performance (Mastekaasa, 2020). The public sector's existence keeps it from delivering typical market products. Hence public managers should be appropriately motivated to take actions focused on efficiency and be more inclined to put discipline in spending funds. They use few economic indicators or far less information on a given market functioning in decision-making (Rudolf, 2020). Managers are restricted from influencing their

subordinates and experience various financial and organizational limitations (Rainey and Chun, 2005). HRM in the Polish public sector seems far less developed in methods and practices (Sidor-Rządkowska, 2013).

In turn, the IA experience is indispensable (Czerwiński, 2004). According to Bailey (2010), the internal auditor is one of the 'hottest' professions globally, with growth opportunities. Audit experience is considered the skills that the auditors obtained when auditing the tasks by applying relevant audit standards, accounting guidance and their error-specific experiences (Musig, Ussahawanitchakit, 2011). Some findings show a significant relationship between IAE, its scope and auditors' experience (Shamki, Alhajri 2017). The analysis of job advertisements for internal auditors shows that the competencies most sought after by employers are, respectively: formal education (in the case of Poland and Germany) and professional certificates (in the case of Great Britain and the USA) (Grzesiak, 2019). The internal auditors knowledge should be derived from their professional and life experience, which, according to the majority of the surveyed internal auditors, means that young people should instead not become internal auditors (Grzesiak, 2021a). According to research by Van Peurse (2004), experienced internal auditors can significantly impact the organisation's management.

The obligation to conduct an internal audit is reserved for certain Polish organisations, for example those from the public sector, insurance companies, banks, and companies listed on the Warsaw Stock Exchange (Grzesiak, 2021a). In the Polish public sector, there are three possible situations: an internal audit is mandatory, an internal audit is mandatory, but when the specific conditions are fulfilled, or an internal audit is not mandatory (Public Finance Act of 27 August 2009, article 274).

Based on a review of the management literature, the following research questions were developed:

- RQ1: Is it possible to build A-OEPM, IAC and IAE constructs from the selected items according to the statistical requirements?
- RQ2: Is it possible to develop the A-OEPM → IAC → IAE model according to the statistical requirements?
- RQ3: Are the A-OEPM practices able to decrease the IAC to reduce its influence on IAE?
- RQ4: Is IAC a mediator for the A-OEPM → IAE model according to the statistical requirements?
- RQ5: How do MODs affect the model?

3. METHOD

3.1. Theory model, variables and hypotheses development

The research aimed to develop, verify and analyse the hypothesis of the influence of audit-oriented employee performance management (A-OEPM) practices on IAE mediated by the internal audit constraints (IAC), as presented in the model (Figure 1). The use of EPM can be helpful to inhibit organisational constraints through employee behaviour influence (Armstrong and Ward 2005; Houldsworth and Jirasinghe 2006). The model was moderated by four particular moderators (MODs) that could change the relations between the constructs.

The research questions helped to develop and build the model. Four hypotheses were constructed:

- H1: A-OEPM is positively related to IAE
- H2: A-OEPM is negatively related to IAC
- H3: IAC is negatively related to IAE
- H4: MODs differentiate the relationship between variables in the model.

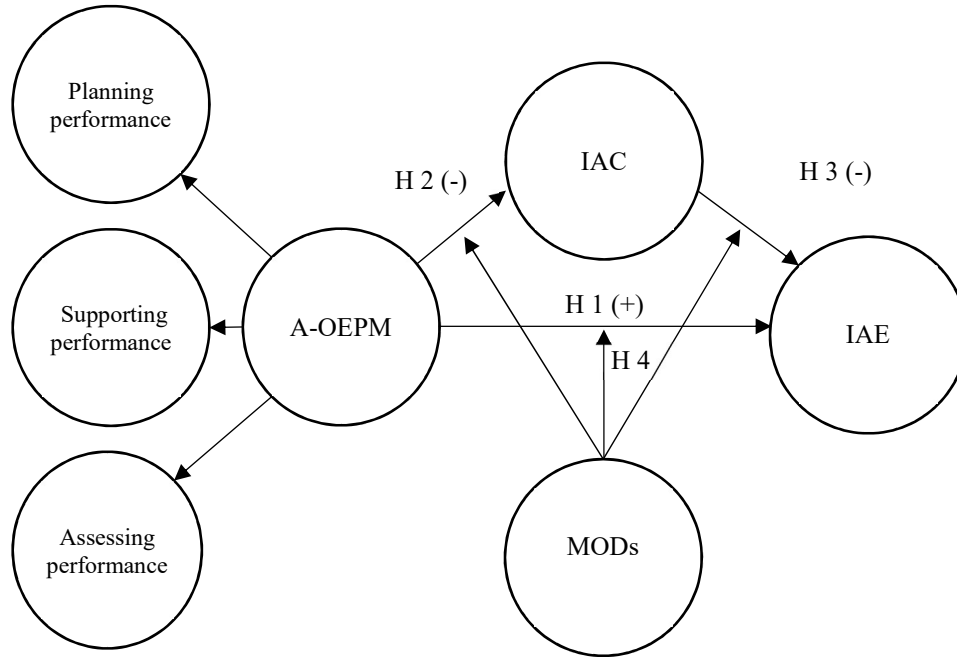


Figure 1. Model presenting the influence of A-OEPM on IAE mediated by the IAC (n=128)

Source: own work.

The model was developed using modelling of structural equations in SMART PLS-SEM 3 software (Ringle et al., 2015). The initial step of the modelling needed to develop three constructs (A-OEPM, IAC and IAE) based on management literature review (Table 2). The A-OEPM construct was to have included three latent variables with separate set of items per each reflecting three sets of EPM practices within planning, supporting and assessing employee performance (see Appendix 1). Correlations of the positions in total for some items (especially regarding planning stage) were not satisfactory (below 0.4) and had to be excluded from the constructs. Having items excluded from the constructs that represent typical EPM practices (such as job descriptions and personal development plans) was quite surprising. It is especially intriguing to remove any team activity towards an individual during planning, supporting and assessing performance. All the EPM practices refer only to the interactions between manager and individuals and may reflect specific power share between the parties. As a consequence there is a single A-OEPM construct with a set of practices mainly reflecting planning (i.e. improving), supporting and assessing an employee's job performance without paying special attention to personal development

and team-oriented practices. In contrast, only a single item was excluded from both the IAC and IAE constructs.

Table 2. Development of constructs

Construct	Measurement and references based on:	Amount of items; see Appendix 1
Audit-oriented EPM (A-OEPM)	(Aguinis, 2009), (Armstrong, 2012), (Hutchinson, 2013)	18
Internal Audit Effectiveness (IAE)	(Arena, Azzone 2009), (Badara, Saidin, 2013), (Endaya, Hanefah, 2013), (Lenz, Hahn, 2015), (Lenz et al., 2017), (Standards, 2016)	11
Internal Audit Constraints (IAC)	(Arena, Azzone 2009), (Badara, Saidin, 2013), (Lenz, Hahn, 2015), (Lenz et al., 2017)	6

Source: based on authors findings.

All model constructs achieved adequate Cronbach's alpha (above 0.7), factor loading (above 0.5) and their value in the variance test reached at least 70% (Table 3).

Table 3. Reliability Coefficients of the Constructs

Constructs	Items	Factor loading	Cronbach's Alfa (min. 0.7)	CR (rho_a) (min. 0.7)	CR (rho_c) (min. 0.7)	AVE (min. 0.5)
A-OEPM	PL 2	0.621	0.910	0.917	0.927	0.587
	PL 4	0.687				
	SU 1	0.706				
	SU 2	0.641				
	SU 4	0.695				
	AP 4	0.826				
	AP 5	0.837				
	AP 6	0.874				
IAC	AP 7	0.870	0.756	0.768	0.836	0.507
	IAC 1	0.765				
	IAC 2	0.734				
	IAC 3	0.623				
	IAC 4	0.768				
IAE	IAC 5	0.656	0.896	0.907	0.914	0.518
	IAE 2	0.563				
	IAE 3	0.729				
	IAE 4	0.714				
	IAE 5	0.713				
	IAE 6	0.663				
	IAE 7	0.764				
	IAE 8	0.754				
	IAE 9	0.683				
	IAE 10	0.808				
IAE 11	0.780					

Source: based on authors findings.

Discriminant validity has been established in this structural equation model using the Fornell-Larcker criterion and Heterotrait-Monotrait (HTMT) ratio results. The minimum acceptable value of 0.7 through diagonals by Fornell-Larcker criterion is fulfilled (see Fornell, Larcker, 1981). There is no single convention for a threshold value that would indicate high discriminant validity within HTMT – a common proposal value is < 0.90 between two constructs (Henseler et al., 2015) (Table 4).

Table 4. The Fornell-Larcker criterion

Constructs	Fornell-Larcker criterion			HTMT ratio results	
	A-OEPM	IAC	IAE	A-OEPM	IAC
A-OEPM	0.766	---	---	---	---
IAC	-0.367	0.712	---	0.418	---
IAE	0.507	-0.682	0.720	0.555	0.798

Source: based on authors findings.

3.2. Sample

The authors conducted the survey in late 2021 using the Computer-Assisted Web Interview (CAWI) method. A five-point Likert scale questionnaire with closed items was used to collect respondents' opinions. The social network such as LinkedIn, and closed professional forums for internal auditors on Facebook were used to collect the data. The research was also promoted by authors during online and in-real conferences on internal audit.

Table 5. Descriptive statistics and correlation between constructs (n = 128)

No.	Spearman's Rank correlation	A-OEPM	IAC	IAE	Mean	Std. dev.
(1)	A-OEPM	1.000	0,509879*	- 0,360793*	3,428819	1,016144
(2)	IAC	0,509879*	1.000	- 0,645995*	2,397	0,9708
(3)	IAE	- 0,360793*	- 0,645995*	1.000	3,8586	0,971
MOD_1	Private sector and public sector	-0,211560*	-0,058809	0,112708		
MOD_2	Up to 10 years' IA experience and 11 years' IA experience and more	-0,156887	-0,188103*	0,125930		
MOD_3	I am a member of the IIA: yes / no	0,039028	0,004481	0,013476		
MOD_4	The organization I work for is required to use internal audit: yes / no	-0,085247	-0,148466	0,217571*		

* Correlation is significant at the 0.05 level (2-tailed).

Source: based on authors findings.

The total research sample consisted of 128 internal auditors who worked (as employees) in internal audit departments across Poland. This means that the sample was selected

randomly based on the availability of respondents. There is a must to highlight the fact that potential respondents were highly reluctant to participate in the survey.

The degree of association between the three constructs (A-OEPM, IAC and IAE) and selected moderators (MOD_1, MOD_2, MOD_3 and MOD_4) was examined by correlation analysis. The data suggest that moderators MOD_1, MOD_2 and MOD_4 have a significant and weak correlation with the A-OEPM, IAC and IAE constructs (Table 5).

The data in Table 5 points out that respondents representing private-sector assessed A-OEPM practices better than public-sector representatives (MOD_1). In turn, less IA-experienced respondents found IAC more problematic than more experienced individuals (MOD_2). It was also found that respondents who were obligated to introduce IA into practice assessed IAE worse than those who introduced it voluntarily (MOD_4).

4. RESEARCH FINDINGS AND DISCUSSION

4.1. General model

The model of the influence of A-OEPM on IAE mediated by the IAC was constructed in accordance with the theory presented previously. Regression analysis was employed to check the results of the tested hypothesis. The final model was developed (Table 6) with a set of items behind the constructs.

The model shows a weak and statistically significant influence of A-OEPM practices on IAE (SRW = 0.296, $p < 0.001$). IAC is a partially mediating construct in the model. The standardized indirect effect between A-OEPM and IAE is higher than the direct effect by 0.211, amounting to 0.506 ($p < 0.001$).

Table 6. The model of A-OEPM – IAE mediated by IAC (n=128)

Constructs	Original Sample (O)	Sample Mean (M)	Standard Deviation (STDEV)	T Statistics (O/STDEV)	p-value
IAC → IAE	-0.574	-0.575	0.057	10.121	***
A-OEPM → IAC	-0.367	-0.387	0.069	5.350	***
A-OEPM → IAE	0.296	0.300	0.069	4.312	***

Note: $p < .001$ ***

Source: based on authors findings.

Table 7 shows the goodness-of-fit measures for the model, which were mostly achieved. The following three measures are highlighted here:

- The R^2 is a measure of the model's explanatory power and represents the amount of variance in the endogenous constructs explained by all the exogenous constructs linked to it (Hair et al., 2019).
- The F^2 assesses how strongly one exogenous construct contributes to explaining a certain endogenous construct in terms of R^2 .
- A value less than 0.10 (or of 0.08 – in a more conservative version) are considered a good fit in terms of SRMR measure.

Table 7. Results of the A-OEPM – IAE mediated by IAC model fits (n=128)*

The goodness-of-fit measure	Model			Result
Chi-square (λ^2) p-value	Chi-square = 720.442 Probability level = .000			requirement was not achieved
R ²	A-OEPM = .135 IAE = .542			weak explanatory power regarding A-OEPM and moderate for IAE
Adjusted R ²	A-OEPM = .128 IAE = .534			
F ²		A-OEPM	IAE	strong effect for IAE – IAC relation and weak for the rest relations
	A-OEPM	---	0.165	
	IAE	0.165	---	
	IAC	0.156	0.621	
Standardised root mean square residual (SRMR)	0.09			requirement was achieved
Exact model fit test – d_ ULS	2.365			result accepted
Exact model fit test – d_ G	1.228			result accepted
Bentler-Bonett Index – NFI (Normed Fit Index)	0.658			moderate fit
RMS Theta	0.165			requirement was achieved

* the measures values were interpreted based on (Hooper et al., 2008) and (Ringle et al., 2015).

Source: based on authors findings.

4.2. Moderators (MODS)

In this study, moderators are used to show how a type of economic sector (MOD_1), IA work experience (MOD_2), the membership in IIA (MOD_3) and internal audit requirement in an organization (MOD_4) influence the relationship between variables in the model.

Table 8. Internal audit work experience (n=128)

	up to 10 years' IA experience				over 11 years' IA experience				
	Path Coefficients Original	STDEV	t-Value	p-Value	Path Coefficients Original	STDEV	t-Value	p-Value	p-Value original 1-tailed
A-OEPM → IAC	-0.403	0.125	3.222	0.001	-0.361	0.089	4.059	0.000	0.610
A-OEPM → IAE	0.188	0.107	1.749	0.081	0.372	0.093	3.987	0.000	0.905
IAC → IAE	-0.670	0.087	7.720	0.000	-0.508	0.080	6.387	0.000	0.917

Source: based on authors findings.

The internal audit years' experience is the only contextual factor differentiating the model (Table 8). Employees with up to 10 years of internal audit experience change the model, with the IAC taking on a fully mediating role between A-OEPM and IAE. These findings fit perfectly with the previous remarks regarding the need for audit experience, which derives over time from their professional and life experience. Less experienced internal auditors must learn to overcome IAC to become more experienced professionals who can significantly impact the organization's management and consequently be able to build bridges between A-OEPM and IAE.

4.3. Implications for theory and practice

This study provides new evidence on A-OEPM for IA practices in Poland that commonly highlight the consequence of power share in relations between CAE and internal auditors. CAEs are not engaged in employee development and they use management by objective method instead EPM. In practice, CAEs exclude team-oriented practices from the above relations. Interestingly, neither a job description tool or a career development plan were used. On the one hand, internal auditors do not have neither the full management nor coworkers support. On the other hand they are not sure whether the stakeholders' expectations are met. As a consequence internal auditors very often invest their own private resources in themselves in order to meet the Standards' requirements regarding the competence development (see: Grzesiak, 2021a). However, only the practices that support up-to-date IA tasks and responsibilities, in terms of setting objectives, performance improvement plans, monitoring, feedback, coaching and performance appraisal, are of the highest importance for managerial decisions.

In spite of the above shortages regarding the A-OEPM practices it could be an excellent measure to overcome the IAC and help both parties to introduce the organizational change to achieve IAE. This phenomenon is clearly observed for less experienced internal auditors whose job mainly concentrates on reducing IAC to improve IAE.

4.4. Limitations and research opportunities

Online research does not allow the researcher to ensure that respondents understand the questions correctly. The relatively long questionnaire (as in this research) may have led respondents to choose random answers. The results of the study may have been affected by interpretation errors and low control over the circumstances in which the questionnaire was completed. The sample tested was comparatively small and it is not possible to speak of representativeness in statistical terms. The perspective of the respondents can only reflect opinions.

Due to the fact that the study was conducted within Polish national culture context, the findings need to be interpreted with caution as the answers provided by auditors may vary between countries. This may impact the model results and, consequently, the conclusions.

5. DISCUSSION AND HYPOTHESES VERIFICATION

According to the EPM system, a manager is responsible for the staff's development to make them fulfil obligations and achieve professional goals through mutual trust, development, positive reinforcement and effective communication (Armstrong, 2009; Hutchinson, 2013). Similarly, the CAE coordinates the work of IA department. The CAE must share tasks among subordinates according to their competencies and job responsibilities (Skoczylas-Tworek, 2014). However, the larger organisation is considered,

the higher dispersed responsibility for the organisation among IA staff is observed (Moeller, 2018).

The findings show that the respondents are doubtful about added value for stakeholders, which should have been an item within the IAE construct. This could have happened as a result of either a never-ending drive for professional perfection or a signal for management's help. Unfortunately, lacking managerial support in career building is a massive obstacle in the development-oriented A-OEPM system. Hence, it puts the whole of the internal auditors learning responsibility into their own hands.

Since an internal auditor's work experience improves the competences over time to decrease the IAC, the CAE needs to plan and introduce a set of A-OEPM practices. The findings show that the less experienced internal auditors are, the CAE's highest concern to develop the A-OEPM practices.

The good news is that the respondents do not perceive the organization staff as a threat that maliciously interfere with IA activities. It could help them to do their job and makes the CAE activities regarding A-OEPM more plausible.

Not all of the moderators studied are relevant to highlight significant differences or strengths between the model constructs. IA work experience differentiates the model according to the management literature. The findings do not support the management literature regarding some contextual factors and previously expected differences in the model between the public and private sectors. The same conclusion goes for a share of the Standards (2016) participation in IA professional development and universality of internal audit practices among organizations. The results are confusing and need further, deepened studying.

In light of all the results presented, it is possible to confirm all four hypotheses (there is no reason to reject any hypothesis). Bearing the findings in mind, the research questions stated in this research have yielded the following answers:

1. A set of items for each of the three constructs was developed based on the management literature.
2. It is possible to develop the A-OEPM → IAC → IAE model according to the statistical requirements.
3. The A-OEPM practices were able to decrease the IAC to reduce its influence on IAE.
4. IAC is partly mediator of the model.
5. Out of four selected contextual factors, only the work experience fully moderated the model, which shows the high significance of the A-OEPM practices for less experienced internal auditors.

It is a must to highlight that in order to overcome the IAC, the A-OEPM could be a valuable tool to help CAEs and internal auditors implement organizational changes necessary to achieve IAE.

6. CONCLUSIONS

The results can help managers to deal more professionally with the IA performance. Consequently, the A-OEPM needs more attention and a further need for current and future studies to expand the research on audit staff experience and A-OEPM practices. It is believed that further research can usefully develop the framework of practices. Contextual factors are the key to analysing the A-OEPM → IAC → IAE model. Perhaps it could reveal significant differences in the model construct for public and private sectors, as the literature

emphasizes the differences in managing these entities. There is a need to find out why team practices mean less than it was previously expected, and whether *CAE – team – individual* communication channels are properly developed. Moreover, it is a must to be more familiar with the real influence of the Standards (2016) on A-OEPM in the Polish economic reality.

We hope that our findings provide an essential spark to take a closer look at internal auditors as human beings and will help shift the researcher's scope of interest beyond the functional IAE.

Notes:

1. The overview of the expectations placed on internal auditors is described in (Grzesiak, 2021a).
2. Their review is included in (Grzesiak, 2021a).

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Appendix 1. Questionnaire items regarding constructs

Internal Audit Constraints (IAC)

- IAC_1: In their attitudes, the auditees and the management staff let me understand that they do not understand the core of internal audit
- IAC_2: In an organization, internal audit is understood as an activity that generates only costs
- IAC_3: Misunderstanding of internal audit in an organization causes, among others, that there is an atmosphere of understatement / fear around its activities
- IAC_4: In the organization, internal audit is not treated as an important and necessary function of the organization
- IAC_5: The organization tries to influence my independence and objectivity as an internal auditor
- IAC_6: In an organization, internal audit activity is maliciously disrupted by others

Internal Audit Effectiveness (IAE)

- IAE_1: The organization meets the expectations of stakeholders (clients) of internal audit
IAE_2: The activity of internal audit in the organization is subordinated to the Standards
IAE_3: Internal audit adds value to the organization
IAE_4: Internal audit improves the operation of the organization
IAE_5: In the organization, the management staff is ready to implement post-audit recommendations
IAE_6: Internal audit has the resources necessary to improve the organization's operations
IAE_7: Internal audit has the resources to cause change
IAE_8: Internal audit is understood within the organization
IAE_9: Internal audit meets the goals set for it in the organization
IAE_10: Internal audit activity is seen as important within the organization
IAE_11: The organization uses the full potential of internal audit

Auditor-oriented Employee Performance Management (A-oEPM)**PL –performance plan**

- PL_1: I have a job description
PL_2: I have individual employee goals
PL_3: As a team member, I have team goals
PL_4: In case of underperformance, a remediation plan for a single audit team member is established
PL_5: I have a "what" and "how" plan to improve my own work effectiveness
PL_6: I have a career development plan

SU – performance support

- SU_1: My work performance is monitored on an ongoing basis by my immediate superior
SU_2: My immediate supervisor provides me with continuous feedback regarding my work
SU_3: My team members provide me with continuous feedback regarding my work
SU_4: My immediate supervisor is my workplace coach/ workplace trainer
SU_5: The members of my team provide me with advice at work

AP – performance assessment

- AP_1: My performance appraisal takes the form of a conversation with the immediate supervisor
AP_2: The team has its share in my performance appraisal
AP_3: The other employees has their share in my performance appraisal
AP_4: During performance appraisal I receive feedback regarding my work performance for a given period
AP_5: The findings from performance appraisal relate to my strengths
AP_6: The findings from performance appraisal relate to ways to build my work effectiveness based on my strengths
AP_7: The findings from performance appraisal relate to the areas of work that I have to improve

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BIBLIOMETRIC ANALYSIS OF THE CURRENT STATE OF RESEARCH IN THE FIELD OF COGNITIVE TECHNOLOGIES IN LOGISTICS

This study explores the development of cognitive technology in logistics research from 1998 to 2023 through a bibliometric analysis. Using data from the Web of Science Core Collection and Scopus, the research examines how knowledge in this field has evolved, focusing on global knowledge exchange and emerging research trends. The study employs a quantitative approach, utilizing a bibliometric analysis model supported by specific research questions. The analysis covers document sources, geographic origins, publishers, document types, and publication peaks. A keyword connection map illustrates key findings, revealing notable differences in publication numbers between the two databases, with Scopus containing a broader range of research areas. The United States is identified as a leading source of publications, primarily scientific articles. Key themes include demographics, controlled studies, cognition, logistics, machine learning, and technology. The research highlights the importance of bibliometrics in understanding knowledge dynamics and suggests further exploration of cognitive technologies in Logistics.

Keywords: bibliometric method, cognitive technology, logistics, research, Scopus, Web of Science Core Collection.

1. INTRODUCTION

Some research methods are extremely helpful in categorizing concepts in the literature (Martínez-López et al., 2018). In recent years, researchers have observed a significant surge in the popularity of bibliometric analysis within specialized research (Donthu et al., 2020; 2021b), which allows for the quantification of scientific publications presented in selected databases (Zupic, Cater, 2015; Horzela-Miś, 2022), which are useful for assessing the connections between key elements of a given publication (Stanescu et al., 2021; Arita, 2017; Khan et al., 2021). This analysis combines statistical and mathematical methods to quantify recorded information in scientific publications (Suriyankietkaew, Petison, 2020). Bibliometric analysis, an immensely important tool in the study of scientific literature as repeatedly emphasized in the literature by researchers like Donthu et al. (2021a), Persson

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et al. (2009), and Alsharif et al. (2020), allows for deep insights into the structures and dynamics of publications (Gholampour et al., 2019; Du et al., 2021) across various knowledge domains (Li et al., 2020). It is key to understanding how scientific disciplines evolve (Franceschini et al., 2016; Albareda, Hajikhani, 2019) through the identification of major trends (Arbeláez-Gómez, Onrubia-Goñi, 2014) research directions (Santos, 2015), and influential works (Allen et al., 2009) as well as the proposed discipline affinity. In a scientific article, the introduction to bibliometric analysis serves as a guidepost, leading the reader through the complex world of research, highlighting the goals, scope, and methodology of the study (Leal Filho et al., 2023; Yin, 2009). A general overview of the scientific field in which the analysis is conducted outlines the context and signifies the importance of bibliometrics as a crucial research tool (Moral-Munoz et al., 2020). Bibliometric analysis is essential for understanding a specific scientific area (Verma and Gustafsson, 2020) and the introduction should emphasize how this method allows for observing changes and patterns in scientific publications (González-Serrano et al., 2020).

Bibliometric analysis is valuable for deciphering and mapping accumulated scientific knowledge and the subtle evolution of established fields, thereby rigorously organizing the significance of large amounts of unstructured data (Baako, Abroampa, 2023). Well-conducted bibliometric studies have the potential to lay solid foundations for new and significant advancements in a given field (Yilmaz, Tuzlukaya, 2023). These methods equip researchers with a broad perspective, pinpoint overlooked areas of inquiry, inspire fresh lines of investigation, and help them integrate forthcoming projects into the wider discipline (Simion et al., 2023). A critical element of bibliometric analysis is also a clear presentation of the research methodology (Chai, Xiao, 2012), including data collection methods, selection criteria, and analysis techniques (Ellegaard, Wallin, 2015; Gan et al., 2022). This part should be detailed enough for the reader to understand how the data were collected and processed, which enhances the transparency and credibility of the study. Mapping and clustering methods are frequently employed to examine such networks (Bartolacci et al., 2020; Cobo et al., 2011). Bibliometric analysis, a computer-driven method for performing metrological and content-based research on bibliometric data (Sri et al., 2020), can help address certain constraints. Specialized tools can automatically detect and extract relevant information, then display it in an Excel spreadsheet or visually map it for easier interpretation (Xia et al., 2022). The results are fast, simple, coherent, and comprehensive (Zhao, Li, 2019).

Automated tools are often used for bibliometric analysis in modern times (Maoral-Munoz et al., 2020). The advantages and disadvantages of using automated tools for bibliometric analysis are significant. A tool often chosen for bibliometric analysis is the VOSviewer software (Yu et al., 2020; Kuzior, Sira, 2022; Tamala et al., 2022). The advantages of automatic bibliometric analysis, as exemplified by VOSviewer, include primarily its efficiency and objectivity (Van Eck, Waltman, 2021; Linnenluecke et al., 2020). Automation allows for processing vast data sets in a short time, which is impossible with manual analysis (Van Raan, 2014), enabling quick identification of trends, patterns, and key works in a field (Shang et al., 2015). The use of this software also allows you to visualize the network of connections between key words co-occurring with the studied concepts (Rahmawati, Subardjo, 2022; Effendi et al., 2021). On the other hand, the disadvantages of automatically conducted bibliometric analysis, also using VOSviewer, mainly stem from the limitations of the tool itself and the nature of the data. Automated tools may struggle with interpreting the context and significance of some publications, especially those that are interdisciplinary or of an unusual nature (Karanatsiou et al., 2017).

There is also the risk of over-reliance on quantitative metrics, which can lead to the neglect of qualitative aspects of research (Brown et al., 2020).

The aim of this paper is to share the findings of a bibliometric analysis on the topic of cognitive technology in logistics. In its opening section, the article explains the theoretical basis of the chosen research methodology. The subsequent presentation of results concentrates on academic works addressing cognitive technology in logistics between 1998 and 2023, drawn from two of the most prominent global research databases: Web of Science Core Collection and Scopus. The principal method employed involves a keyword-based examination of bibliometric data indexed in these sources. Publications from 1998 to 2023 were evaluated both quantitatively and through an analysis of co-occurring words and authors. This approach made it possible to pinpoint influential research centers and notable scholars focusing on cognitive technology in logistics. The study also scrutinizes the periods during which this topic garnered the most attention, as well as the thematic areas most frequently associated with it. Furthermore, leveraging data from Web of Science Core Collection and Scopus allowed identification of the publication types and key publishers with the highest volume of works linked to the keywords “cognitive technology in logistics”.

2. METHODOLOGY

In this study, the bibliometric analysis method has been chosen for its capacity to address research inquiries concerning the fundamental principles and subjects in the research field. The utilization of this method offers several advantages, particularly objectivity and quantifiability, aiding in avoiding subjective biases (Linnenluecke et al., 2020). This selection justifies the appropriateness of adopting this methodological approach. This article aims to share the findings of a bibliometric investigation into scientific research on cognitive technology in logistics, focusing on publications from 1998 to 2023 sourced from the Web of Science Core Collection and Scopus databases. The following research questions were formulated as part of the research process:

1. What is the total number of publications on cognitive technologies in logistics?
2. What is the number of publications on cognitive technologies in logistics considering criteria such as title or abstract or keywords?
3. What is the number of publications that include terms such as cognitive technologies and logistics in the title?
4. In what years were the most publications related to the studied areas produced?
5. In which journals have the most papers related to cognitive technologies in logistics been published?
6. What research areas are most often associated with cognitive technologies in logistics?
7. In which countries are publications related to cognitive technologies in logistics most frequently produced?
8. What keywords most often co-occur with the terms cognitive technologies and logistics?

To refine the research process, a research model was developed and illustrated in Figure 1.

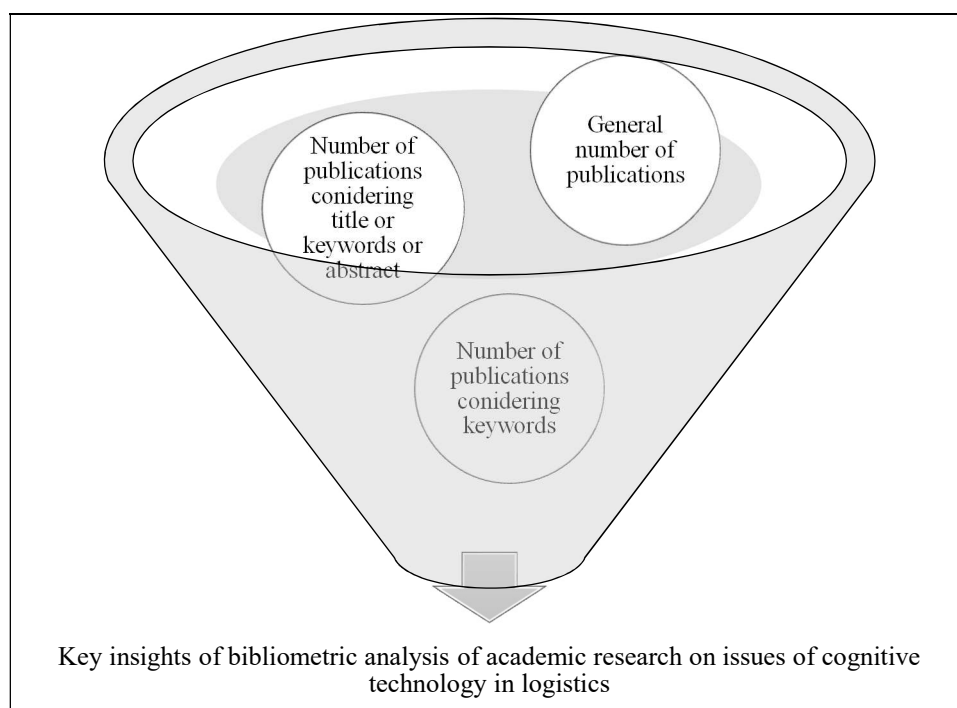


Figure 1. Research model

Source: Own conception.

The introduced research model delineates the structure and methodology employed in conducting the study. Based on this model, the authors conducted an analysis, interpretation, and presentation of the research findings. According to Figure 1, in the initial phase of the study, the authors task was to investigate what is the general number of publications on issues of cognitive technology in logistics in two selected databases. The next stage focuses on criteria such as title, keywords or abstract. Finally, the authors conducted a comparative analysis of the results for the Scopus database and the Web of Science Core Collection for the keywords criteria.

This search was performed and compared on the April 24, 2024. Providing the date of document collection holds immense importance due to the dynamic nature of databases, which undergo continuous updates and changes (Liu et al., 2015). This article presents a bibliometric analysis of scholarly works published between 1998 and 2023, retrieved from two of the largest global repositories of scientific publications: the Web of Science Core Collection and Scopus. The study covers all articles in the Web of Science Core Collection™ indices (SSCI, SCI-Expanded, A&HCI, CPCI-S, CPCI-SSH, BKCI-S, BKCI-SSH, and ESCI) addressing the topic of cognitive technology in logistics, regardless of the research domain. The resulting data from Web of Science Core Collection were then compared with those from Scopus, chosen for their multidisciplinary scope and high standards of scientific publication quality. The main keywords chosen for the article are cognitive technologies and logistics.

The article uses descriptive bibliometrics. A refined search was conducted within the topic field, encompassing titles, abstracts, or document keywords. The choice of this field stemmed from its widespread use in bibliographic studies (Thananusak, 2019; Calabuig-Moreno, 2020; Terán-Yépez, 2020), considered more suitable than other options because it houses the most pertinent words related to the article's subject within these sections. The search words was cognitive technology and logistics. The findings presented here should be interpreted with caution, as they represent just one possible perspective on scholarly efforts concerning cognitive technology in logistics. They should ideally be complemented by a more in-depth examination of data from the Web of Science Core Collection, Scopus, and other widely recognized international databases. The analysis focused on metrics of scientific output and associated indicators, such as the annual publication volume, the most prevalent research fields featuring cognitive technology in logistics, publication types, frequently occurring journal titles, key authors, and the academic centers that publish the most in this domain. Additionally, this article explores the applicability of bibliometric methods to studying cognitive technology in logistics and highlights the main constraints encountered when conducting this form of analysis.

3. RESULTS

3.1. Scopus

Considering the total number of publications in the Scopus database for a search for cognitive technology in all fields received result of 1,168,721. With reference to the title or abstract or keywords in all research areas in April 2024, the Scopus database recorded 55,786 scientific publications related to the term cognitive technologies. They are mainly related to areas such as Computer Science (43%), Engineering (27%), Social Sciences (23%), Medicine (20%), Psychology (9%). They are mainly scientific articles and conference materials. On the other hand, considering the term logistics itself, these publications have already been recorded by far more, as many as 749,166, of which nearly 87% were articles. These publications are mainly in areas such as Medicine, Engineering, Biochemistry, Genetics and Molecular Biology, Computer Science, and Social Sciences. The vast majority, as more than 13,130 publications were published in the journal Plos One. The most popular affiliation of authors is Harvard Medical School, with 11,231 authors.

Wanting to combine the two concepts studied, i.e. cognitive technology and logistics, the Scopus database considering all fields reports 51,390 results. Limiting the search to article title, abstract, keywords the result obtained was 460. Then limiting search to only one variable, i.e. the title of the publication, provides only one result. This is an article from the journal Smart Innovation, Systems and Technologies from 2020, which deals with the optimization of logistic business processes based on the implementation of cognitive information technologies. On the other hand, expanding the research area and focusing on keywords, the database reports 50 publications related to the concepts studied. Figure 2 presents the time range of these publications.

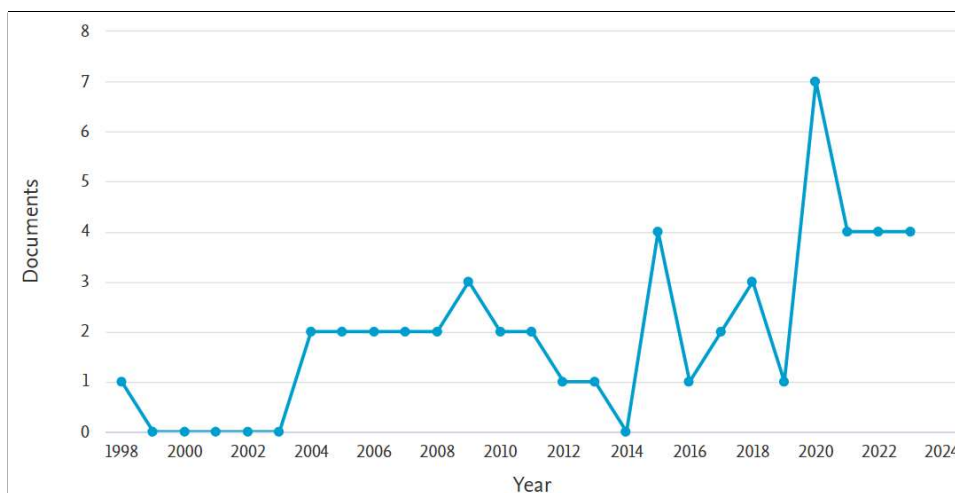


Figure 2. Publication years

Source: Adapted from: “Scopus”.

According to Figure 2, the first publication related to the areas of cognitive technology and logistics was in 1998. There were no publications related to the areas of cognitive technology and logistics in 1999–2003 and 2014. This may be due to the lack of significant research or low interest in the area during these specific periods. There were 3 publications each in 2009 and 2018, and 4 publications each in 2015 and 2021, indicating some stability in researchers' interest in this area. The largest increase in the number of publications occurred in 2020, when as many as 7 papers were published. This may suggest that this particular year saw a spike in research or interest in the area of cognitive technology and logistics. Also in 2023, there was a significant number of publications, namely 4. This suggests that interest in the area remains high, which may be due to the continued development of technology or the growing importance of cognitive technology and logistics issues. In summary, the chart shows the variation in the number of publications over the years, with the biggest jump in 2020, which could be a key point for further analysis and exploration of the reasons for this increase.

Considering the type of publication, the Scopus database distinguishes only three groups: articles (27), conference papers (20), reviews (3). Analysing the number of articles, 2 each were published in journals such as: *Frontiers In Neurology*, *Journal Of Medical Internet Research*. The remaining articles were published in single journals. 5 researchers qualified for authorship with 2 publications each. Considering their affiliation, the most authors are credited to the University of California, Los Angeles, and 2 authors each from centers such as Defense Science and Technology Group, David Geffen School of Medicine at UCLA, University of South Australia, Fraunhofer Institute for Material Flow and Logistics IML, Royal Australian Air Force, VA Greater Los Angeles Healthcare System. The greatest disparity in the base of these 50 publications related to the keywords cognitive technologies and logistics can be seen by analysing the country from which the authors of the publications come. The vast majority, as many as 38%, come from the United States, 12% from Germany, 10% each from Australia and China, the remaining countries are:

United Kingdom, India, Norway, Netherlands, South Korea, Taiwan, Brazil, France, Hong Kong, Israel, Italy, Latvia, Nigeria, Slovenia, Spain.

The last point to make when discussing the base of 50 articles that keywords are related to cognitive technologies and logistics is the areas in which these works are produced. Details of the scientific areas in which authors are most likely to publish are presented in Figure 3.

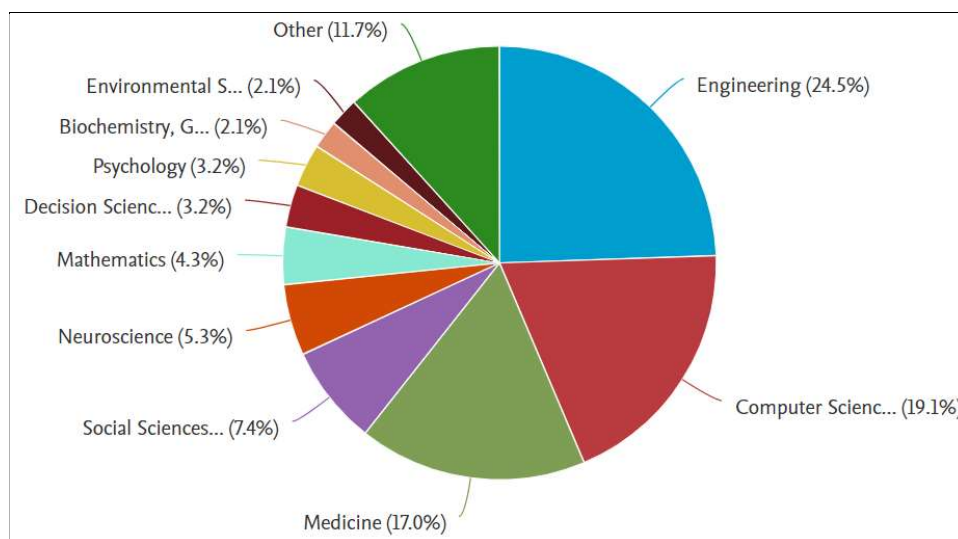


Figure 3. Document by subject area

Source: Adapted from: "Scopus".

These results indicate that areas such as Engineering, Computer Science and Medicine are the main areas in which works related to cognitive technologies and logistics are published (total more than 60%). Meanwhile, Social Sciences, Neuroscience and Mathematics also feature prominently in publications related to these areas. Other areas such as Decision Sciences, Psychology, Biochemistry, Genetics and Molecular Biology, Environmental Sciences, Health Professions and Nursing were also represented, although to a lesser extent. In contrast, fields such as agricultural sciences, arts and humanities, business management and accounting, chemistry, earth and planetary sciences, and physics and astronomy are less common in cognitive technology and logistics publications.

A recent bibliometric analysis conducted in the Scopus database was carried out taking into account the studied 2 concepts in the abstract area. In this case, the total number of publications is considerably higher – 327. The first article was written in 1996. The number of articles in successive years is gradually increasing, as of 2017 their number exceeded 10, in 2018 – 20, 2021 it was 51, 2022 – 55. Considering the types of publications, the situation is more diverse than in the previous analysis. Detailed results are presented in Figure 4.

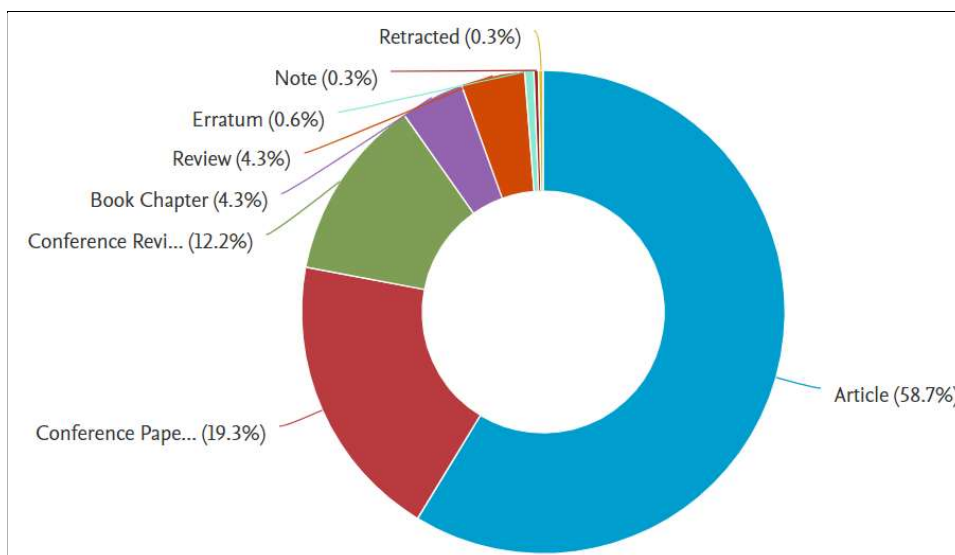


Figure 4. Documents by type

Source: Adapted from: "Scopus".

According to Figure 4, we can see that scientific articles account for the largest share of publications related to the field under study (almost 60%). Their high number indicates deep, detailed research, which suggests intensive research activity and significant contributions to the development of knowledge related to cognitive technologies and logistics. A total of 103 papers were produced as a result of participation in scientific conferences (Conference Paper – 63, Conference Review – 40), which also indicates the involvement of researchers in presentations and discussions at conferences on the areas under study. Chapters in books appear for the first time in this compilation, but they account for only 4% of the total number of all publications.

Analysing the areas in which the publications originated, we can see a very high probability to the previous bibliometric analysis, which took into account the co-occurrence of the studied terms only in the keywords. Analysing them in the abstract, we can see that these areas recur, among the most popular are: Computer Science (19,7%), Medicine (17%), Engineering (15,7%), Social Sciences (7,6%), Mathematics (5,2%) and the other.

The last two issues that will be discussed are the journals with the most publications per year and the documents by country or territory. Considering the journals in which authors were most likely to publish their work related to cognitive technologies and logistics, 5 leading journals can be identified (Figure 5).

As can be seen in Figure 5 these documents are: *Advances In Intelligent Systems And Computing* (8 publications), *Communications In Computer And Information Science* (8 publications, that were produced in the years 2011-2013), *Journal Of Medical Internet Research* (7 publications), *Lecture Notes In Computer Science Including Subseries Lecture Notes In Artificial Intelligence And Lecture Notes In Bioinformatics* (6 publications), *Lecture Notes In Networks And Systems* (5 publications). Most of the papers were

produced from 2018–2023, which indicates the high research potential of the areas of logistics and cognitive technologies.

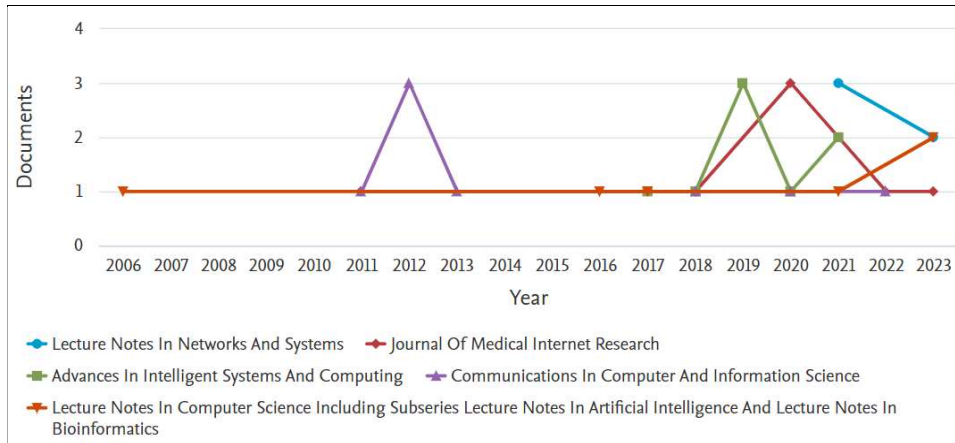


Figure 5. Documents per years by source

Source: Adapted from: “Scopus”.

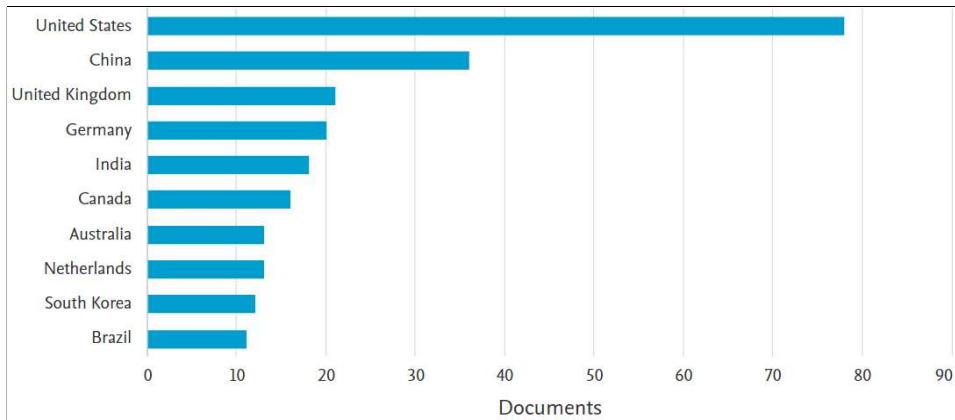


Figure 6. Documents by country or territory

Source: Adapted from: “Scopus”.

Analysing the data presented in Figure 6, one can see a convergence with the previous analysis. The largest number of works also originated in the United States (78 publications). This confirms their significant role in research on cognitive technologies and logistics. This was followed by the increased activity of China, with 36 publications. Other countries with developed research sectors, such as the United Kingdom (21), Germany (20), India (18), and Canada (16), are also in the mix, with a significant share of publications.

Based on data downloaded from the Scopus database, a map of the association of the two terms under study with the keywords that appeared most frequently in connection with the issues under study was developed. Taking the value of 9 as the minimum number of keyword occurrences, then out of 4327 keywords 113 meet the threshold. The map of the co-occurrence of keywords for the term cognitive technology and logistics is presented in Figure 7.

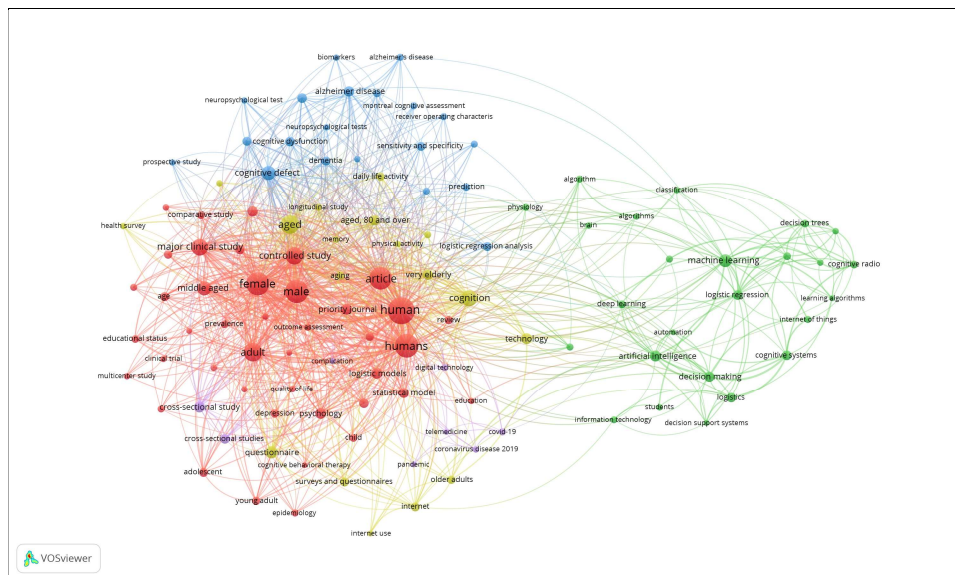


Figure 7. Map of co-occurrence of keywords for the term Cognitive technology and logistics
Source: Own work.

Figure 7 stands for the network visualization that emerged in the scientific papers in Scopus database. The clustering technique was used to distinguish 4 main clusters (red, green, yellow and blue). The word map illustrates the frequency of word occurrences within an article and the interrelation between keywords. In the network, each term is depicted as a circle, where the size of the circle corresponds to the number of publications in which the term was found. Each colour represents a group of interconnected terms forming clusters, and the curvature of the lines approximates the connections between repeated instances of the term, while the thickness of the lines indicates the strength of associations between thematic areas or keywords. The blue area consists of topics related to cognition, the red one is about human, the yellow one is about cognitive defect and the green is connected to machine learning. Clusters represent the relationship between one topic and another. Limiting the search to 113 keywords from all the surveyed papers, 3744 links were obtained, and total link strength was 18543. The next figure shows the keywords that appeared most frequently in the 4 clusters generated.

According to figure 8, visualization of keywords for the concepts studied, presented in this article, indicated that they are most often linked to issues such as: human, adult, female, male, article, aged, controlled study, major clinical study, cognition, cognitive defect,

middle aged, logistic models, cohort analysis, psychology, sensitive and specificity, procedures, risk factors, machine learning, daily life activity, technology.

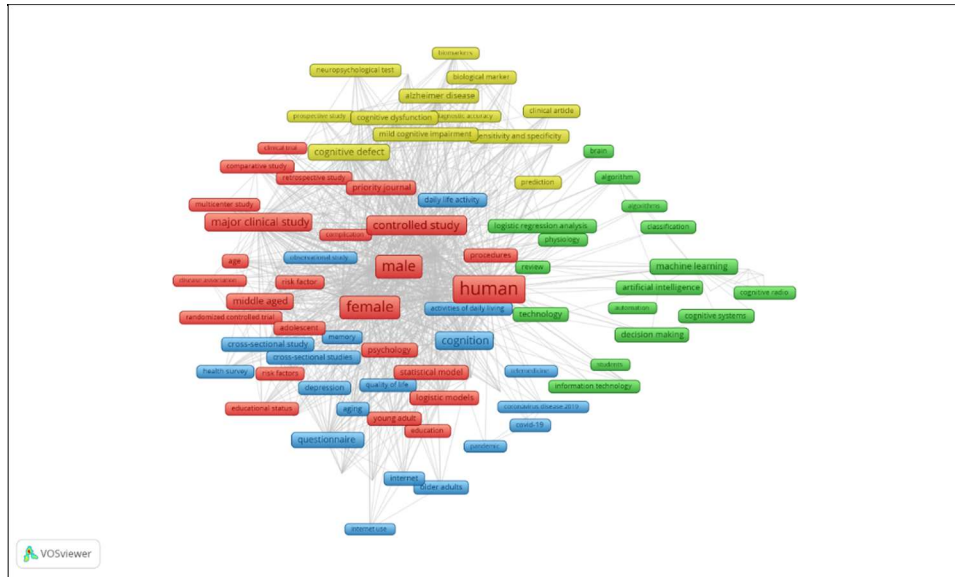


Figure 8. Visualization of keywords for the term Cognitive technology and logistics
Source: Own work.

3.2. Web of Science Core Collection

With reference to the total number of publications in the Web of Science Core Collection database for a search for cognitive technology in all fields received result of 96,024. This is 10 times less compared to the Scopus database. With respect to title, abstract or keywords in all research areas in April, 2024, the Web of Science Core Collection database recorded 30,937 scientific publications related to the term cognitive technologies. They mainly concern such areas as Engineering Electrical Electronic, Educational Research, Telecommunications, Computer Science (Information Systems, Theory Methods, Artificial Intelligence, Interdisciplinary Applications), Neurosciences, Cybernetics, Management. However, taking into account the term logistics itself, there were already many more such publications, as many as 575,809 of which nearly 92% were articles. These publications are mainly in areas such as Public Environmental Occupational Health, Medicine General Internal, Surgery, Oncology, Clinical Neurology. More than 530,000 of these publications are scientific articles, and most were published in journals: Plos One, BMC Public Health, International Journal of Environmental Research and Public Health, Scientific Reports.

General number of publications related to cognitive technology and logistics in all fields in Web of Science Core Collection is 1, 759. This is significantly less considering the result from the Scopus database (51, 390). Considering the title or abstract or keywords in all research areas in April 2024, the Web of Science Core Collection database recorded 222 scientific publications related to the term cognitive technologies in logistics. If we compare the result with the data of the Scopus it is twice as much. These were mainly

scientific articles – more than 71% that were related to such scientific areas: Operations Research Management Science, Management, Engineering Electrical Electronic, Engineering Industrial, Computer Science Information Systems, Environmental Studies, Economic, Business, Transportation. On the other hand, if we maximally restrict searches in the Web of Science Core Collection database to only one variable – the title of the publication, we get 1 result. This is a proceedings paper from 2020 and its authors are the same team of scientists as the article searched in the Scopus database (Volodina, E.V., Kudryashova, P.A., Studentova, E.A.). The topic of the paper is optimization of logistics business processes within the framework of export activities based on the introduction of cognitive information technologies.

To develop a detailed bibliometric analysis comparing to the Scopus database, the research area analysed focused on keywords related to cognitive technologies and logistics. In this area, the Web of Science Core Collection database generated only 2 results (where the Scopus database had as many as 50). The detailed characteristics of these two works are presented in Table 1.

Table 1. Papers focused on keywords related to cognitive technologies and logistics in Web of Science Core Collection

	Paper 1	Paper 2
Title	Cognitive approach in the analysis of using financial technologies in corporate finance	Healthcare Logistics Optimization Framework for Efficient Supply Chain Management in Niger Delta Region of Nigeria
Author	Morozko, NINA Morozko, NAT Didenko, VY	Umoren, IJ Etuk, UE Ekong, AP Udonyah, KC
Document type	Proceedings Paper	Article
Source	Gepmed 2018 – International Scientific Conference Global Challenges and Prospects of The Modern Economic Development, Vol. 57	International Journal of Advanced Computer Science and Applications, Vol. 12, issue 4
Published	2019	2021
Keywords	Financial technologies, corporate finance, cognitive management, valuation, cost factors, logistic regression	Dedicated logistics department (DLD), Quality of Care (QoC), Quality of Experience (QoE), information/cognitive technologies (ETA) and type-1 fuzzy logic model
Research areas	Development Studies, Business & Economics	Computer Science
Development Studies Economics	Development Studies, Economics	Computer Science, Theory & Methods

Source: Own work.

According to Table 1, only 2 scientific papers related to cognitive technologies and logistics were recorded in the Web of Science Core Collection database. Paper 1 focuses

on the cognitive approach in analysing financial technologies within corporate finance, emphasizing valuation and cost factors using logistic regression. Paper 2 concentrates on developing a Healthcare Logistics Optimization Framework for efficient supply chain management in the Niger Delta region of Nigeria. It includes elements like Dedicated Logistics Department (DLD), Quality of Care (QoC), Quality of Experience (QoE), information/cognitive technologies (ETA), and a type-1 fuzzy logic model. Both papers share common authors (Morozko, NINA, and Didenko, VY), but they are published in different document types and sources. Document 1 is a Proceedings Paper in Gcpmed 2018, while Document 2 is an Article in the International Journal of Advanced Computer Science and Applications in 2021. Paper 1 falls within Development Studies, Business & Economics domains, focusing on the economic aspects of utilizing cognitive approaches in financial technologies. The second one spans Development Studies, Economics, and Computer Science, emphasizing logistics optimization in healthcare using advanced computer science methods and fuzzy logic models. The keywords in Paper 1 revolve around financial technologies, corporate finance, cognitive management, valuation, and logistic regression. Paper 2's keywords highlight healthcare logistics optimization, Quality of Care/Experience, information/cognitive technologies, and a type-1 fuzzy logic model.

The last stage of bibliometric analysis for the two concepts of cognitive technology and logistics under study is the overall compilation of the results obtained from the two databases. The aggregate results for each search criteria are presented in Table 2.

Table 2. Number of publications related to the terms cognitive technologies and logistics limiting searches to selected variables of the Scopus database and Web of Science Core Collection

Cognitive technology and logistics	Scopus	Web of science Core Collection
General number (in all fields)	51, 390	1, 759
Article title, abstract, keywords	460	222
Abstract	326	222
Keywords	50	2
Title	1	1
First publication (considering keywords)	1998	2019

Source: Own work.

According to Table 2, there is a noticeable difference in the total number of publications between the two databases analysed. Scopus records significantly more scientific papers in the overall number considering all fields in an area of cognitive technology and logistics (right 30 times more). These differences are greatly diminished by narrowing the research area to the title, abstract and keywords. In this case, the difference is just over 200 scientific papers. Another significant difference can be seen by analysing the studied concepts in keywords. There are as many as 50 documents in the Scopus database, where only 2 were noted in Web of Science Core Collection. These differences, in turn, are lost in the title of scientific papers, since the result for both databases studied was the same – 1 paper. Considering keywords, in the Scopus database the first article appeared in 1998, while in the Web of Science Core Collection database only in 2019. These differences may be due to the extent of coverage of these databases, their indexing criteria, differences in the

journals reviewed, and differences in the inclusion of different types of publications. Such differences in data between different bibliometric databases are relatively common and result from the different data collection methodologies and indexing criteria used by each platform. It is important to take these differences into account when analysing bibliometric data.

4. CONCLUSION

Analysing the results from all the databases studied, no books covering the topic of cognitive technologies in logistics were noted. Limiting the search only to the co-occurrence of the studied keywords in the title of the publication, both the Web of Science Core Collection and Scopus databases recorded 1 paper each addressing these issues (from 2020). The article from the Scopus database deals with the optimization of logistic business processes based on the implementation of cognitive information technologies. On the other hand, an proceedings paper from the Web of Science Core Collection database deals with optimization of logistics business processes within the framework of export activities based on the introduction of cognitive information technologies. The authors of these two papers are the same research team: Volodina, EV, Kudryashova, PA, Studentova, EA. An extended bibliometric analysis, limiting searches to the abstract, showed 222 items in the Web of Science Core Collection database, and 326 items in the Scopus database. Publications addressing the areas under study are mainly articles, and their total number is relatively small.

It is important to keep in mind that Scopus and Web of Science apply different indexing methods and cover distinct publication sets, which can lead to variations in bibliometric analysis outcomes. Among the most significant differences may be the indexing area. The Scopus database typically includes a larger number of journals from different areas of science, often including publications from outside the sciences. This database takes into account a larger time range compared to the Web of Science Core Collection. Scopus uses more automatic indexing methods, which can result in a larger number of indexed publications, but can sometimes be less precise about quality, while the Web of Science Core Collection has a reputation for focusing on careful and accurate indexing, which can result in fewer indexed publications, but usually ensures high quality. As a result, this may influence the perceived significance of certain publications and the prominence of specific citations. The uniqueness of journals for a single database can also be pointed out as a difference between the databases studied. Some journals and publications appear exclusively in one database rather than both, meaning authors publishing in those journals will only be listed as lead authors in the respective database. In addition, discrepancies in citation counts often stem from the fact that certain institutions or countries may only have access to one database, which influences authors' decisions on where to publish. Nonetheless, despite these potential differences, the bibliometric analysis remains a valuable tool for gauging the influence of scientific publications and identifying key areas of research.

Future research should incorporate a broader range of metrics, particularly those related to citations, collaborations, and the national dimension of cognitive technology publications in logistics. Although this study primarily draws on data from the Web of Science Core Collection and Scopus, these databases can be employed more extensively going forward. The scope can also be broadened by examining additional internationally recognized databases. While these repositories grant access to a wealth of global

publications and knowledge, many journals remain unindexed, rendering the resulting picture incomplete - especially because such databases typically focus on English-language sources. The analysis that was conducted relied mainly on quantitative indicators. The qualitative aspects of the research are also worth developing in the future.

Considering all the years studied, i.e. 1998–2023, it can be seen that the total number of publications addressing cognitive technologies in logistics is small. This study confirms the existence of a research gap and the great potential of the studied scientific area. Hence, the current analysis serves as an initial examination and warrants more extensive investigation.

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COMPARISON OF RISK MANAGEMENT IN THE AVIATION AND AUTOMOTIVE INDUSTRIES

The purpose of this article is to present the risk management process in the project management of two industries: aviation and automotive. The analysis was based on a comparison of the two approaches based on the risk matrix used. Risk management differs between industries, and it is up to the organization to choose the monitoring and methodology adapted to the specific sector. Risk management is an important aspect of the entire project life cycle and must be monitored throughout the project life cycle to protect not only the budget but all areas of the so-called "golden triangle." Of great importance is the organization's awareness that risk management is everyone's responsibility, not just the project manager's.

Keywords: risk, risk management, risk matrix.

1. INTRODUCTION AND LITERATURE REVIEW

Project risk management seeks to identify all foreseeable risks, assess the chance of their occurrence, as well as how severe their subsequent effects may be.

Risks can arise at any stage of a project. Sometimes it is related to specific tasks, while at other times it has a source outside the project and can surface without warning. In general, risks that occur in the later phases of a project can cost more time and money than risks that occur in the initial phases. This is because the sum of costs and the value of work-in-progress at risk of loss or damage increase over time (Lock, 2013).

Risk taking in projects is inevitable as all projects lead to change, and change is accompanied by uncertainty and therefore risk (Trocki, 2012; Drączkowska, 2020)

Risk management should therefore be systemic, rather than haphazard, as it is in some projects. It is about proactively identifying, assessing and controlling those risks that can affect the achievement of project objectives. A cost-effective risk management procedure should be established and maintained in the project.

The essence of risk arises from the fact that decisions are made about the future, making decisions under such conditions of risk is nothing more than making decisions without complete information. In all types of ventures there is a possibility of events that will entail consequences, which are either opportunities for positive benefits or threats to the success of the venture. It is accepted that risk concerns not only the negative but also the positive aspects of an action (Trocki, 2012; Kerzner, 2001).

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Risk management is an ongoing activity that is carried out throughout the life of a project. Without an ongoing, effective risk management procedure, it cannot be ensured that the project will be able to fulfil its objectives and that it is therefore worth continuing. Effective risk management is therefore a requirement of the principle of maintaining continuous business case (Kerzner 2001; Malec, 2009).

Risk management protects and adds value to an organisation because it contributes to the achievement of its objectives by: providing a systemic framework, through which the organization will be run in a consistent and controlled manner, streamlines processes in the organization, allows more efficient use of the resources at hand, protects and builds the image of the company and improves the efficiency of operations (Marcinek, 2000; Kisielnicki, 2017).

2. RISK ASSESSMENT AND ANALYSIS

Once the risk factors have been identified and a list of them created, the likelihood of their occurrence and the effects they may have can be assessed. In the process, the least likely factors among those suggested during brainstorming are weeded out, while the events most likely to occur or that would have the greatest impact on the project are brought to the fore. Such analysis requires consideration of the possible causes and effects of each event posing a risk to the project.

Among risk assessment, we can distinguish between qualitative and quantitative risk analysis.

Qualitative risk analysis involves considering all risk factors in a descriptive way to imagine their various characteristics and their physical impact on the project. The main methods here are fault tree analysis and the Ishikawa diagram.

Quantitative analysis allows you to determine the performance of the project, taking into account the identified opportunities and risks. In addition, it involves one step more than quantitative analysis, aiming to quantify the outcome of a risky event or to assign numbers to risk factors corresponding to their priority from the point of view of preventive action or mitigation of undesirable consequences. In this case, a commonly used method is the analysis of types, effects and criticality of errors-FMECA (Lock, 2013).

3. PROJECT RISK MANAGEMENT STRATEGY

Once all known risk factors have been identified, evaluated and ranked in order of importance, it's time to think, next.

Risk response planning involves developing options for activities and actions that can be taken to take advantage of emerging opportunities, minimize or avoid risks. In this process, a risk owner is appointed, i.e. a person responsible for carrying out the tasks related to the adopted response to a given risk.

Depending on the assumptions made and the specifics of the project or its risks, the project manager may address risks in different ways.

Relevant techniques and strategies are described below:

- Transfer – is the transfer of responsibility or consequences associated with a given risk to another group of stakeholders; risk transfer rarely leads to risk elimination, but rather forces others to mitigate, accept or avoid it; risks can be transferred to contractors, suppliers, customers or insurers.

- Avoidance – involves changing the project plan to eliminate the risk or related conditions or to protect the project objectives from the possible consequences of the risk.
- Passive acceptance – consists of accepting the risk without taking any action other than documenting it.
- Active acceptance – consists of creating a retreat plan to be implemented when the risk event occurs. The turnaround plan includes detailed instructions on how to proceed and how to make a budget provision for the project.
- Reducing – involves selecting solutions with less risk than others. It is accepted because it involves potentially less adverse conditions. This strategy involves reducing the probability and/or consequences of an adverse event to an acceptable level. Taking timely action to reduce the probability or consequences of risks is preferable to fixing them (Kerzner, 2001; Prince2tm, 2009).

Risk in a project can be both an opportunity and a threat as shown in the table below:

Table 1. Risk Management Strategies

Risk as	Chance	Avoidance Minimalization Active acceptance Passive acceptance
	Danger	Utilization Strengthening Sharing up Acceptance

Source: prepared by author.

As a result of conducting the risk response planning process, the project team updates and expands the risk register that is originally created in the risk identification process. The risk register (risk matrix) should include the following information a description of the risks with their characteristics, effects on the project, a list of owners of each risk, adopted risk response strategies, budget, schedule, and recovery and contingency plans.

4. RISK MANAGEMENT IN THE AVIATION INDUSTRY

Risk management in aviation is a necessary procedure in the matter of all aviation parts. It is the process of taking action and directing in such a way that the risk of a given hazard is minimized to an acceptable level.

This is primarily related to the existence of so-called “critical parts”, which are responsible for the safety of travelers.

As risk management in aviation is of particular importance, in addition to the typical risk matrix for each type of project, more or less extensive, a Risk Management Plan is created.

This plan is related to the organization's risk management procedures.

This plan consists of the following elements: risk management methods and tools, a description of the roles and responsibilities of those responsible for risk management, a budget and a risk management schedule. Each plan selects a risk management method (qualitative or quantitative) and establishes the form of reporting and monitoring of the various elements.

Below is the actual risk management matrix that is used in one of the companies in the Aviation Valley.

Table 2. Example of risk register

Risk ID number	Entry Date	Risk description	Probability of occurrence (L) [%]	Effect (E) [EUR]	Difficult to detect [1-3]	Value $V=L*E$ [EUR]	Preventive action	Responsible person

Source: prepared by author.

This matrix applied to all projects in the organization. It is a “living” document, reviewed at weekly meetings and reported monthly to the company's top management.

Each matrix includes a risk identification number, which allows monitoring the occurrence of risks and not repeating risks already listed.

In addition, the matrix includes the following information: the date of introduction, allowing to track when the risk occurred, a broad description of the risk in question along with the reason for its occurrence, the probability of its occurrence given as a percentage.

This probability is expressed on the basis of a quantitative analysis. The effect of the risk is derived from the valuation of the risk in question in relation to the project budget at hand.

The difficulty of detection is defined here on a 3-grade scale, where 1 – means a very low chance of detection and 3 – means a high chance of detection.

Some projects use a green, yellow and red colour scale for this point.

The value of the risk is estimated as the product of the probability and the effect of its occurrence.

In addition, there is a column for preventive action, this being the planned strategy.

The last column is information about the responsible person (risk owner), who reports the status of the risk in question and applies strategies to minimize or avoid the risk.

This document varies in size over the course of the project depending on the complexity of the project, the project challenges and the involvement of the project team.

Risk Rejstr is an excellent tool not only for reporting, as it is an appendix to the action plan, as well as LL for newly implemented projects.

5. RISK MANAGEMENT IN THE AUTOMOTIVE INDUSTRY

Risk management for the automotive industry looks completely different than for aviation. In this case, risks are assessed in quite different categories, although the quantitative method still prevails here.

In the case of company X, there is no standard matrix for risk management. There is a certain template created, which is customized for each project.

One of the matrices used for the passcar project is shown below.

Table 3. Matrices for passcar project

Risk ID number	Category	Risk description	Probability of occurrence (1-3-5)	Severity (S) (1-3-5)	Risk rank P*S	Risk response	Analysis/LL	Responsible role	Comments

Source: prepared by author.

A typical matrix consists of 10 columns, in which the risk number is determined, consistent with the action plan reviewed with management. Column two contains information on the risk category. For the project, risks (technological, construction, social, economic, legal or environmental) can be selected from a drop-down list. Column three is the name of the risk along with its description. The fourth and fifth columns allow you to calculate the cost of risk for a given category.

The product of the estimated probability value expressed numerically from 1–3, where 1 means low probability, 3 means medium probability, 5 high probability. For the incidence effect, the scale is identical.

The risk in this case is the product of the probability and the effect of occurrence.

In the case of a value greater than 15, the risk is marked in red, which indicates its high importance for the project. The project team, in the case of risks marked yellow <15, only monitors the status of the risk so that it does not increase in value and become red. When the risk takes values >15 it is necessary to take immediate action that will not disrupt the “golden triangle of the project”.

The seventh column refers to the planned strategy for a given risk. As in the case of the aviation industry, one can choose here to transfer, avoid, minimize or accept a given risk in active (contingency plan) or passive terms.

The eighth column is an in-depth analysis of a given risk using 8D reports or brainstorming by the project team.

This is also the place to enter lessons learned from previous projects if the team has any.

The last column is also a place for commenters, tips, which will help in solving this risk.

6. CONCLUSION

Based on the risk matrix analyzed for the aerospace and automotive industries, it is safe to say that the approach in both cases is very similar and is based on the IPMA methodology in the context of project risk management.

Of course, the way of risk management is slightly different in these two industries, although this is due to the specifics of the product and the different approach to the topic of standards and procedures.

Each organization develops a risk management approach tailored to the needs of the product and process. Such refinement depends mainly on the complexity of the product

and the duration of the overall project. Risk management is an ongoing process and affects all areas in a project.

The more thorough the risk analysis at each stage of the project, the better the management and monitoring of all components throughout the project.

Nevertheless, even the best risk management system in an organization must be constantly monitored and updated so that all elements of risk are supervised. Such a task is mainly assigned to the project manager.

However, the monitoring and management of risks belongs to the entire team, so that ultimately at the end of the project duration, deliver the product in accordance with the stated objectives and the golden triangle principle from the project initiation phase.

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DETERMINANTS OF ENTERPRISE COLLABORATION ON INNOVATION

The paper explores the factors that impact a firm's propensity to collaborate on innovation activities based on a questionnaire survey conducted with 104 innovation-active enterprises from Lubelskie Voivodeship, covering the years 2017-2019. The factor analysis was applied to categorize collaboration partners into institutional, market, and internal. To explain the enterprise's propensity to collaborate on innovation, we employed two linear regression models. As determinants of cooperation, we included the absorptive capacity, the firm size, and the scale of activity. The results reveal that absorptive capacity, firm size, and scale of activity significantly enhance collaboration with institutional partners, while firm size has a greater impact on the propensity to collaborate with market partners among microenterprises compared to small enterprises. The findings underscore the role of innovation expenditures and firm-specific characteristics in shaping collaborative innovation behaviors, emphasizing the critical importance of partnerships for fostering innovation in enterprises.

Keywords: innovation, collaboration, SME, absorptive capacity, firm size.

1. INTRODUCTION

Innovation is a critical driver of economic growth, competitive advantage, and organisational success in a knowledge-based economy. The complexity of innovation processes often exceeds the capabilities of a single firm, necessitating collaboration with external partners. Collaboration on innovation activity allows firms to access complementary resources, share risks, and accelerate the development and commercialisation of new products, services, and processes. It is proven to be positively correlated to innovation performance (Xie, Liu, Chen, 2023).

Understanding the determinants of enterprise collaboration on innovation has become a vital area of study. Despite the growing interest in collaborative innovation, the factors influencing enterprises' decisions to engage in such partnerships remain diverse and

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context-dependent. Firm-level characteristics, such as size, absorptive capacity, and strategic orientation, play a significant role in shaping collaboration opportunities. At the same time, external factors, including industry dynamics, policy environments, and network characteristics, shape the landscape of collaboration. Additionally, the success of cooperation often hinges on the partners' attributes, such as trust, complementary capabilities, and shared goals.

Existing literature provides valuable insights into these determinants, but gaps remain in understanding the mechanisms that impact the propensity to collaborate with various partners. This study seeks to address these gaps aiming at exploring the determinants of collaboration with institutional and market and internal partners.

The remainder of the paper is structured as follows: The next section presents an overview of the literature illustrating the role of collaboration on innovation activities and its determinants. The third section describes the data and methods employed to assess the types and determinants of collaboration on innovation activities of enterprises in the Lubelskie Voivodship. The fourth section demonstrates the results of the analysis, along with a discussion. Finally, it recapitulates the study's main conclusions and provides some suggestions for further research.

2. LITERATURE REVIEW

The concept of collaborative innovation is rooted in the understanding that no single firm can possess all the resources, expertise, and knowledge required to innovate effectively in today's complex and rapidly evolving markets. The idea of open innovation, emphasising that firms must collaborate with external entities to leverage complementary assets and access external knowledge was introduced by Chesbrough (2003). This approach has become increasingly relevant as technological advancements and globalisation have made innovation processes more interconnected and multidisciplinary, and gained significant attention among academics and practitioners (Dahlander, Gann, Wallin, 2021).

Collaboration between business entities is a long-term, pro-partner approach beyond individual purchase-sale transactions (Ritter, Ford, 2004). Establishing such relationships requires time and involves a series of interactions, resulting in significant interdependence between cooperating entities (Håkansson, Johanson, 1992; Blois, 1998). This interdependence involves partners engaging in joint activities to exchange resources, which may be limited to specific aspects of the enterprise's operations (Forsgren et al., 1995). Innovation activities largely depend on the firm's relationships with entities that provide information, knowledge, technology, and human and financial resources necessary for innovation. These connections link the enterprise with other actors in the innovation system, such as R&D units, universities, suppliers, customers, competitors, and entities responsible for innovation policy (Matras-Bolibok, 2012).

Collaboration with other entities offers firms better and broader access to knowledge and new technologies, promoting the exchange of experiences and knowledge while reducing the costs and risks associated with innovation activities (Nieto, Santamaria, Fernandez, 2015). Moreover, as Tiwari, Mohnen, Palm, and van der Loeff (2007) point out, firms belonging to collaborative networks find it easier to secure financial support for R&D activities. Such collaboration can be prospective and long-term without necessarily delivering immediate or measurable economic benefits for the participating partners (Yu, Lee, 2017).

The benefits of collaboration for enterprises can include the implementation of innovative solutions, access to the latest knowledge, increased competitiveness, improved product quality, enhanced company prestige, acquisition of new customers and/or markets, increased export opportunities, higher profits, creation of new jobs, and reduced operational costs (Chen, Vanhaverbeke, Du, 2016). At the operational level, establishing relationships with external entities leads to greater efficiency, while at the strategic level, it improves the competitive position of the enterprise (Sudolska, 2011).

Collaboration on innovation activities can take various forms, depending on the nature of the partnership and its objectives. These include Industry-University-Research (IUR) and Supply Chain (SC) collaborations (Xie, Liu, Chen, 2023). IUC collaborations involve partnerships between enterprises and academic or research institutions. These collaborations are particularly valuable for accessing cutting-edge knowledge and technologies. Firms benefit from the theoretical and experimental expertise of universities, while academic institutions gain insights into practical applications. Archibugi and Coco (2004) argue that such collaborations enhance knowledge transfer and bridge the gap between theoretical research and industrial application. SC collaborations occur between firms and their suppliers or customers. Such partnerships enable firms to integrate innovation into their supply chains, improving product quality, reducing costs, and accelerating time-to-market. Camisón and Villar (2009) highlight that supply chain partnerships are particularly effective in fostering incremental innovations.

The type of collaboration impacts the firms' innovation performance. Xie, Liu and Chen (2023) find that SC collaborative innovation has a greater impact on firms' innovation performance compared to IUR collaborations. Their findings also demonstrate that formal and informal institutional frameworks enhance the positive relationship between collaborative innovation and innovation performance.

Belderbos et al. (2018) conclude that past R&D collaboration experience significantly influences the formation of new partnerships, with the type and success of prior collaborations shaping firms' preferences for specific partner types. The dynamics of collaboration are path-dependent, where successful collaborations enhance trust and learning, thereby increasing the likelihood of future partnerships with the same partner types. Furthermore, their findings underscore the importance of strategically diversifying partnerships to optimise innovative performance, particularly through collaborations that combine complementary resources and capabilities. Also, according to Van Beers and Zand (2014), R&D cooperation with diverse partners positively impacts firms' innovation performance, particularly when collaborations involve various partner types, such as competitors, suppliers, and universities. However, they reveal that the benefits of partner diversity diminish beyond a certain point, emphasising the need for firms to balance diversity with the complexity of managing such collaborations effectively. These findings suggest that functional and geographical diversity influence innovation through distinct mechanisms. Functional diversity fosters a broad range of knowledge intake and synergies essential for developing and commercialising novel products. In contrast, geographical diversity enhances the successful adaptation of existing products to meet local requirements, such as technical standards, market regulations, and customer preferences.

The propensity to engage in collaborative innovation is also influenced by the firm-level characteristics. A firm's absorptive capacity, understood as an ability to recognize, assimilate, and apply external knowledge, is critical for successful collaboration. Cohen and Levinthal (1990) highlight that firms with high absorptive capacity are better equipped to integrate knowledge gained through partnerships. The propensity to collaborate with

other entities in the implementation and financing of innovations is determined by firm's absorptive capacity, expressed in the level of expenditure on R&D activities as well as other innovation-related investments (Faria, Lima, Santos, 2010; Lasagni, 2012). Large innovative firms typically have the financial and organizational resources necessary for implementing innovations (Igna, Venturini, 2023; Rojek, 2017; Perez-Alaniz et al., 2022). These firms often have dedicated R&D departments or units to support innovation efforts. In contrast, small and medium-sized enterprises (SMEs) rarely have their own R&D teams, which poses a significant barrier to engage in innovation processes. Larger entities not only possess the necessary resources to allocate to collaborations but also derive greater benefits. However, some studies suggest that the primary beneficiaries of collaboration can be smaller enterprises (Nieto, Santamaria, 2010) and those with lower R&D intensity (Barge-Gil, 2010). Larger firms are often more active in innovation and allocate greater resources to this area, which may reduce their interest in collaborating with other entities. Conversely, smaller firms, which lack sufficient financial resources, invest minimally in innovation, and lack R&D infrastructure and personnel, are more inclined to seek partnerships with other organizations to compensate for these limitations and create substantial development opportunities for them. Camisón and Villar (2009) conclude that absorptive capacity and innovation potential, play a pivotal role in determining their propensity for cooperative internationalization. Additionally, they reveal that firms with strong internal competencies are better positioned to establish and benefit from international partnerships, thereby enhancing their global competitiveness and market reach.

The presented considerations highlight the significance of firm size as a factor shaping the propensity to collaborate on innovation. According to Poznańska (2016), cooperation is particularly important for small and medium-sized enterprises (SMEs). Compared to large enterprises, SMEs possess lower financial and material potential, which significantly affects their ability to innovate. As a result, SMEs should prioritize collaboration with other entities, including those in the science sector, to acquire and implement innovations. Also Mazur (2011) demonstrates that smaller enterprises exhibit a higher intensity of collaboration compared to larger firms. According to Stanisławski (2014), collaboration between SMEs and large organizations is notably strong, stemming from SMEs' high willingness to undertake joint initiatives. Larger firms have an edge over SMEs in the area of innovation due to their superior creditworthiness, better financial security, and greater borrowing capacity (Ali, Ahmed, 2022). They also have more opportunities to access external funding sources for research and development (R&D) projects compared to SMEs. Consequently, smaller enterprises frequently seek collaboration with other entities to undertake R&D activities and finance innovations (Evaluation of the effects of support for large enterprises within the cohesion policy in Poland, 2014). On the other hand, Wściubiak (2019) notes that medium and large enterprises demonstrate a greater capacity to comprehensively benefit from interorganizational cooperation. Their advantage over smaller firms lies not only in better resource availability for joint initiatives but also in superior skills in managing external relationship networks and stronger power, which enables them to actively shape the terms of collaboration.

The scale of a company's operations is also an important determinant of its propensity to engage in collaboration for innovation activities. The higher level of innovativeness and greater inclination for collaboration among enterprises operating on an international scale can be attributed to the benefits of economies of scale, which increase with greater market

share (Poznańska, 1998). Micro and small enterprises often operate within local or regional markets, where their activities are typically confined to well-defined segments with low competition. This limitation reduces their opportunities to engage in collaborative innovation activities. Conversely, companies operating on an international scale have greater opportunities to establish partnerships with other entities in the context of innovation. Furthermore, firms collaborating in international markets gain access to advanced foreign knowledge, which, when effectively absorbed, can significantly enhance their innovation capabilities. This process of knowledge assimilation through exporting is commonly referred to as “learning by exporting” (D’Angelo, Ganotakis, Love, 2020). Learning in foreign markets also facilitates the creation of formal cooperation agreements. International partners can provide firms with valuable information, guidance, and support, aiding them in absorbing the knowledge essential for the development of new products and processes.

3. DATA AND RESEARCH METHODS

To assess the determinants of collaboration in innovation activities, a survey study was conducted on a sample of 104 innovation-active enterprises from the Lubelskie Voivodeship and covered the years 2017–2019, while data collection took place between December 2020 and March 2021.

Using the survey questionnaire, we explored the firms’ propensity to cooperate with various partners, i.e. non-profit organisations, guilds of craftsmanship and entrepreneurship, producers chambers and associations, public research institutes, clusters; competitors, regional development agencies; universities, consulting companies, commercial laboratories, private research institutes and laboratories; companies belonging to the group of companies; other companies, suppliers of equipment, materials, components or software, customers). To reduce the number of dichotomous variables relating to the cooperation with specific partners, we applied factor analysis. This multivariate technique allowed us to analyse correlations among observed variables and explore latent factors (Afifi et al., 2020). Factor analysis reveals q common factors that linearly reproduce the original variables:

$$y_{ij} = z_{i1}b_{1j} + z_{i2}b_{2j} + \dots + z_{iq}b_{qj} + e_{ij} \quad (1)$$

where: y_{ij} is the value of the i th observation on the j th variable, z_{ik} is the i th observation on the k th common factor, b_{kj} is the set of linear coefficients called factor loadings and e_{ij} is the j th variable’s unique factor.

Since the observed variables were of a binary nature, it seemed reasonable to use a matrix of tetrachoric correlations for factor analysis. We fitted our model using the principal factor method. The number of factors was determined by employing the Kaiser’s rule, which requires eigenvalues greater than 1. The factors loadings over an absolute value of 0.6 were considered relevant to the interpretation of data.

After predicting scores for the identified common factors, they were used as dependent variables in the linear regression models that explain the propensity to cooperate for innovation. As determinants of cooperation for innovation, we included the absorptive capacity (AC) measured by the firm expenditures on innovation per employee and the firm size measured by assigning firms into the categories: micro (M), small (S), and medium (M). In addition, we controlled for the firm scale of activity measured by classifying

the market in which firms operate: local (L), regional (R), national (N), and international (IN).

4. RESULTS AND DISCUSSION

Based on the size of the enterprises, micro-enterprises dominated among the respondents, accounting for nearly 60% (0–9 employees). The share of small (10–49 employees) and medium-sized (50–249 employees) enterprises was equal to 12.50% and 28% of the sample accordingly. Considering the scope of the surveyed enterprises, the majority were entities operating in international markets – 33%. Nearly 28% of enterprises operated at the national level, 21.15% at the regional level, and 18.27% – in the local markets. As regards the expenditures on innovation per employee, on average, firms spent 45,5 thousand PLN. The structure of innovation expenditures was dominated by R&D investment performed in-house or outsourced to other entities. It was followed by investments in machinery and technical equipment, means of transport, tools, instruments, and equipment. The smallest outlays were earmarked for buildings, premises, and land.

Considering the type of partnership of surveyed enterprises, clients and suppliers of equipment, materials, components, or software are the most frequent partners in innovation activities, indicating the critical importance of supply chain and customer-driven innovation (Figure 1). Other enterprises and companies in the same group follow them, demonstrating the value of collaboration within business networks. Competitors, consulting companies, private laboratories and research units, as well as universities also play significant roles, emphasising the need for knowledge exchange and expertise in fostering innovation. Regional entities like development agencies and clusters highlight the role of localised innovation ecosystems. Public sector entities, public research institutes, and producers' chambers and associations are less frequently involved, and non-profit organisations and guilds of craftsmanship and entrepreneurship show the lowest levels of cooperation, indicating their more niche roles in innovation activities. Overall, the results underscore firms' focus on partnerships that directly support operational and market-driven innovation. At the same time, less emphasis is placed on leveraging the potential of research institutions and specialised organisations to diversify innovation strategies. Our findings are in line with the study by Carvalho et al. (2018), who found that cooperation for innovation within enterprises and within enterprise groups, suppliers of equipment, materials, components and software presented higher intensities than cooperation with other partners in the sample of 111817 firms from 15 European countries.

In order to reduce and systemise the variety of partners in innovation activities, explanatory factor analysis was carried out. After rotation extraction and since two eigenvalues were greater than 1, two factors were retained. These two factors account for 79.2% of the total variance (Table 1).

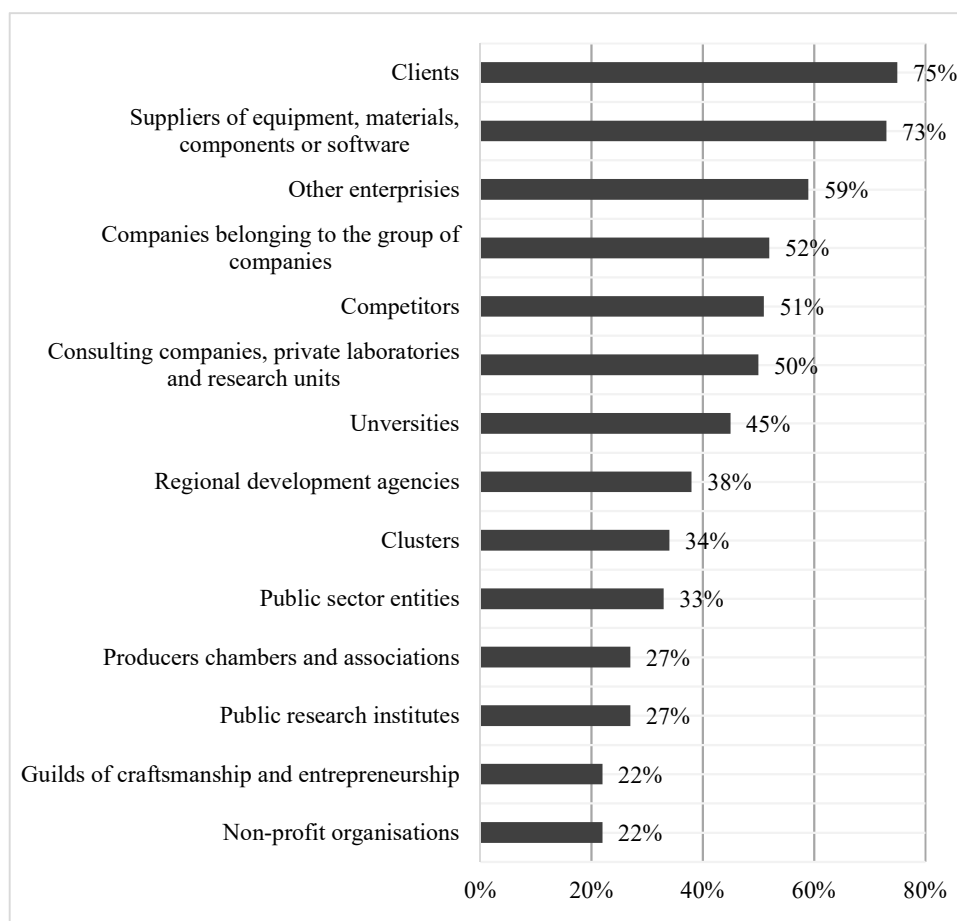


Figure 1. The propensity to collaborate on innovation activities with various partners

Source: own elaboration.

Table 1. Total variance explained

Factor	Variance	Difference	Proportion	Cumulative
Factor 1	6.553	2.017	0.468	0.468
Factor 2	4.536	-	0.324	0.792

Source: own elaboration.

As presented in Table 2, the first factor gathers cooperation partners of institutional or professional character (i.e. consulting companies, companies, private laboratories and research units, universities, public research institutes, non-profit organisations, regional development agencies, clusters, producers chambers and associations, and guilds of craftsmanship and entrepreneurship) and can be named “institutional cooperation”. Within institutional partners for cooperation identified, a few empirical studies emphasise the role of universities and research centres, as well as of public and government institutes, in

innovation (Becker, Dietz, 2004). The second factor loads positively on five items related to the market (i.e. clients, competitors, suppliers, and other companies) and the internal environment (i.e. companies belonging to the group of companies). In this situation, we named this factor “market and internal cooperation”. It should be noted that some studies show that vertical and horizontal cooperation is crucial for reducing internal constraints to innovation (Carvalho et al., 2018).

Table 2. Factor loadings (pattern matrix)

Partners/items	Factor	
	1	2
Companies belonging to the group of companies	-	0.688
Suppliers of equipment, materials, components or software	-	0.826
Clients	-	0.802
Competitors	-	0.898
Other enterprises	-	0.823
Consulting companies, private laboratories and research units	0.708	-
Universities	0.769	-
Public research institutes	0.878	-
Public sector entities	0.779	-
Non-profit organisations	0.779	-
Regional development agencies	0.874	-
Clusters	0.877	-
Producers chambers and associations	0.858	-
Guilds of craftsmanship and entrepreneurship	0.674	-

Note: All loadings greater than 0.6 are presented

Sources: own elaboration.

To study the determinants of the propensity to cooperation for innovation, we employed two linear regression models (i.e. Model 1 for institutional cooperation and Model 2 for market and internal cooperation), using factor scores as dependent variables and the absorptive capacity, the firm size with “micro” as the reference category, and the firm scale of activity with “local” as the reference category as independent variables. The results of the linear regression analyses can be found in Table 3.

Our findings provide evidence to prove that absorptive capacity (AC) is crucial for undertaking cooperation in innovation with institutional partners. This may be explained by the fact that absorptive capacity enhances the ability to absorb and utilise knowledge from partners. In the case of institutional partners such as universities and public/private research institutions, cooperation in innovation typically relates to the transfer of new scientific and technological knowledge (Archibugi, Coco, 2004). This kind of knowledge requires a relatively high level of technological proximity between the interacting partners. The findings also reveal that firm size and the scale of operations are important factors influencing institutional partnerships. Small and medium-sized enterprises (SMEs) exhibit a greater willingness to cooperate with institutional partners for innovation compared to micro firms due to several key reasons. These reasons include resource availability,

Table 3. Linear regression models

Variable	Model	
	1	2
AC	0.014***	0.000
S	0.211**	-0.290**
M	0.445***	-0.055
R	0.319**	-0.120
N	0.091	0.151
IN	0.227*	0.124
Cons.	-0.286***	0.749***
R-squared	0.256	0.129
F(6, 97)	5.66***	2.41**

Note: * $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$.

Sources: own elaboration.

strategic orientation, and the influence of institutional support, which collectively enhance their innovation capabilities. Conversely, micro firms may lack the necessary resources and strategic focus, making them less inclined to pursue institutional partnerships for innovation. The findings of our study demonstrate that micro firms are more eager to collaborate with market and internal partners than small entities. Market-oriented collaborations are particularly appealing for micro firms because they facilitate incremental innovations, reduce costs, and minimize risks associated with innovation activities.

5. CONCLUSIONS

The study provides evidence that collaboration is pivotal in enhancing innovation activities among enterprises. Firms with higher absorptive capacity demonstrate a greater propensity to engage in institutional partnerships, such as those involving universities and research institutions, due to their ability to assimilate and apply new knowledge effectively. The results also indicate that firm size and scale of activity are significant determinants of collaboration with institutional partners. Moreover, the results indicate that microenterprises exhibit a higher tendency, compared to small enterprises, to cooperate with market and internal partners to overcome resource limitations.

The findings underscore the need for tailored policies to support collaborations between firms and institutional partners, particularly for SMEs that face resource constraints. Moreover, fostering regional innovation ecosystems, including research institutions and industry networks, is crucial for enabling effective partnerships. Future research could expand this analysis by exploring the impact of specific types of collaborations on innovation outcomes and examining cross-regional differences to provide a broader perspective on collaborative innovation strategies.

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ECOLOGICAL AND SOCIALLY RESPONSIBLE ACTIVITIES OF BUSINESSES AS A DETERMINANT OF CUSTOMER PURCHASING BEHAVIOR

The paper aims to identify the relationship between businesses engaging in socially responsible measures that affect the environment and society at large and the purchasing behaviors of customers, taking into account differences in their declared knowledge of ecological and social symbols. The paper presents the methodology and results of a survey conducted on a sample of 801 individuals. The research indicated that awareness of eco-labels positively influences the decision to purchase a product from an entity engaged in pro-environmental and pro-social activities. Customers are willing to pay more for a product labeled with an eco-symbol or social symbol. It was also demonstrated that individuals under the age of 35 are more likely to buy products from companies undertaking pro-environmental and pro-social initiatives. The findings of the research have practical value and can enable businesses to more effectively shape the purchasing behaviors of customers by undertaking pro-environmental and pro-social measures.

Keywords: corporate social responsibility, customer purchasing behavior, environment, society, food industry.

1. INTRODUCTION

Companies, motivated by social expectations, investors, and customers, set non-economic goals for themselves (Gallardo-Vazquez, Sanchez-Hernandez, 2014). Increasingly, they incorporate plans for implementing measures aligned with the concept of corporate social responsibility (CSR) into their strategies. CSR entails the obligation of businesses to make decisions and take measures that align with their goals and the values of society. This obligation stems from the belief that companies, especially large ones, are centers of power and decision-making, and their activities influence many aspects of citizens' lives (Bowen, 1953).

CSR is a dominant research topic in the literature on customer purchasing behavior (Kraus, Cane, Ribeiro-Soriano, 2022). Customer purchasing behavior refers to measures aimed at satisfying individual consumption needs by acquiring goods, correlated with the perceived system of preferences and human needs (Zalega, 2012). Customer behaviors in the market for goods, the determinants of their purchasing decisions, are multidimensional and diverse, making them challenging to clearly identify and describe. The factors shaping

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customer purchasing behaviors are characterized by variability, necessitating the repetition and expansion of research to determine the interdependencies between the factors influencing when and from which companies customers buy products. From the perspective of the considerations undertaken in the paper, it is particularly important to assess whether and how pro-environmental and pro-social measures shape these behaviors.

The structure of the article is as follows: In the theoretical part, a synthetic review of the literature addressing the impact of CSR and the knowledge of eco-labels and social symbols on customers' purchasing decisions is conducted. Subsequently, the methodology of the conducted study is presented, and its results are discussed. The paper concludes with a summary containing recommendations for companies wishing to influence customer purchasing behaviors through their pro-social and pro-environmental activities.

2. LITERATURE REVIEW

Social engagement by businesses, although not a direct component of the goods they sell, is one of the factors encouraging purchases. Customers do not solely buy products based on their basic features such as price, quality, functional characteristics, or the extent to which they can satisfy their needs. They purchase products from companies that offer the right product and produce it with the principle of minimizing negative impact on society and the natural environment (Lakatos, Nan, Bacali, Ciobanu, Ciobanu, Cioca, 2021). By purchasing such products, customers can indirectly contribute to environmental protection or create value for society.

Customers are becoming increasingly aware that every process occurring in a business indirectly or directly affects the natural environment (Brajer-Marczak, Piwowar-Sulej, 2023). In addition, they identify with society as a whole and prefer to buy products from companies that engage in CSR, care for society, and provide services for it (Ahmad Jafar, Waheed, Sun, Kazmi, 2023). It should be noted, however, that environmental issues have a greater impact on customer purchasing decisions than social issues (Čerkasov, Huml, Vokáčová, Margarisová, 2017; Nguyen-Viet, 2022).

Customer purchasing behaviors are also influenced by emotions (Tkach, 2019). Buying products from socially responsible entities gives customers a sense of satisfaction and fulfillment (Green, Peloza, 2011; Yu, Han, Ding, He, 2021). Research has also shown that CSR influences the positive evaluation of the product and the company, loyalty to them, and consequently, purchasing decisions (Eisingerich, MacInnis, Park, 2023; Ahmad et al., 2023). CSR also contributes to building trust in customers, which is crucial in preventing them from switching to competitors (Waheed, Shehzad, Arif, Abbas, Mehmood, Usman, 2022). It can be concluded that the benefits of socially responsible measures taken by businesses are diverse (Yang, 2023), both for the business entity itself and for customers.

However, CSR should not only be associated with benefits but also with costs, which can lead to an increase in the final product's price offered to customers (Kiliańska, Krechowicz, 2021). Indeed, CSR requires financial investments, and this translates into costs that impact the prices of products (Habel, Schons, Alavi, Wieseke, 2016).

Customers are willing to pay a higher price for a product from a socially responsible entity (Bastounis, Buckell, Hartmann-Boyce, Cook, King, Potter, Bianchi, Rayner, Jebb, 2021; de-Magistris, Gascia, 2016; Duckworth, Randle, McGale, Jones, Doherty, Halford, Christiansen, 2022), especially when they are informed about CSR activities (Wójcik, 2014). Ecolabels and social symbols are tools through which companies can communicate information about their social responsibility to customers. Therefore, they can influence

customers' purchasing decisions (Majer, Henscher, Reuber, Fischer-Kreer, Fischer, 2022; Rossi, Rivetti, 2020), especially when customers are familiar with ecolabels and social symbols (Kabaja, Wojnarowska, Cesarani, Varese, 2022; Samant, Seo, 2016). Research conducted in Poland, however, shows that especially young customers have a low level of knowledge on this topic (Kabaja, Wojnarowska et al., 2022).

The literature also provides knowledge that customer characteristics differentiate the impact of CSR on their purchasing decisions. Women are more inclined than men to buy environmentally friendly products (Fotopoulos, Krystallis, 2002; Siuda, 2022) and are more aware of environmental issues (Bojanowska, Kulisz, 2020; Shauki, 2011). They also pay more attention to pro-social measures undertaken by businesses (Vicente-Molina, Fernández-Sáinz, Izagirre-Olaizola, 2013) and are more interested in purchasing products from entities engaging in such measures. According to studies, young customers have a higher level of trust in companies implementing pro-social and pro-environmental measures than older individuals (Cho, Hu, 2009). Research also demonstrates that as education levels increase, customers are more likely to make purchasing decisions favoring climate protection (Kurowski, Rutecka-Góra, Smaga, 2022) and supporting initiatives related to CSR (Youn, Kim, 2008).

3. RESEARCH METHODOLOGY

The motivation for conducting the research was to identify a research gap, characterized by insufficient recognition of the impact of knowledge of ecological and social symbols on the purchase of products from companies undertaking pro-environmental and pro-social initiatives by customers from less developed regions (including the Świętokrzyskie Voivodeship).

The objective of the study was to identify the relationship between businesses' engagement in socially responsible measures for the environment and society and the purchasing behaviors of customers, considering differences in their declared knowledge of ecological and social symbols.

Regarding the research objective, 5 research hypotheses were formulated:

H1: Knowledge of social symbols is higher than eco-labels.

H2: There is a positive correlation between knowledge of eco-labels and the frequency of customers purchasing products from companies undertaking environmental initiatives.

H3: Knowledge of social symbols differentiates the frequency of customers buying products from companies undertaking societal initiatives.

H4: Customers with very good financial situations are more likely to be willing to pay a higher price for a product labeled with an eco-label or social symbol.

H5: The age of customers differentiates the frequency of their purchases of products from companies undertaking pro-social and pro-environmental initiatives.

To achieve the set goal and verify the research hypotheses, it was necessary to design and conduct an original study. The study was conducted using a diagnostic survey method with a custom-designed questionnaire. Brainstorming with experts in the field of CSR and Environmental, Social, and Governance (ESG) played a crucial role in designing the questionnaire. It helped identify pro-environmental and pro-social measures, which were then included in the survey questionnaire. A pilot study validated the research tool and semantically adjusted the questions in the questionnaire. In the actual study, respondents answered metric questions and substantive questions, using a five-point Likert scale.

A purposive sampling method was adopted, selecting units for the research sample based on the following control characteristics: gender and year of birth². Invitations to participate in the actual study were accepted by 1960 adults residing in the Świętokrzyskie Voivodeship, and data from 801 respondents were qualified for analysis. The structure of the research sample is presented in Table 1.

Respondents' data were acquired through the use of: pen-and-paper personal interviews (PAPI), computer-assisted web interviews (CAWI), and computer-assisted telephone interviews (CATI). The study was conducted in two-time intervals: December 2019 – February 2020 and November 2020 – March 2021 (with a break due to the outbreak of the COVID-19 pandemic).

Table 1. Research sample characteristics

Feature	Feature values		Number of respondents in the survey sample (N)	Share of respondents in the survey sample (%)
Gender and age	Men	<18–34)	109	14
	Women		105	13
	Men	<35–54)	135	17
	Women		129	15
	Men	(55 and more)	142	18
	Women		181	23
Education	Primary		38	5
	Basic vocational		82	10
	Moderate		345	43
	Higher		336	42
Professional status	Business owner		64	8
	Employee not in a managerial position		122	15
	Employee in a managerial position		305	38
	Pupil/student		57	7
	Retiree/pensioner		177	22
	Unemployed		76	9
Material situation	Very good		43	6
	Good		324	40
	Average		366	46
	Bad		59	7
	Very bad		9	1
Total			801	100

Source: own study.

The data obtained from respondents underwent a process of cleaning and coding. Various elements of descriptive statistics and frequency analysis were utilized for their analysis. To examine the normality of the data distribution, the Shapiro-Wilk test for

² In the study, data regarding the age structure of respondents were aggregated into three intervals, and this determination was aided by conducting preliminary data analyses.

normality was employed. Non-parametric tests for one-way analysis of variance, specifically the Kruskal-Wallis (H) test, were used to determine the statistical significance of the diversity of the variables under investigation. For the mentioned tests, a significance level α of 0.05 was adopted.

The use of data mining techniques, specifically association analysis, allowed for exploratory discovery of relationships between the financial situation of customers and their willingness to pay a higher price for products labeled with an eco-label or social symbol. This method facilitated the detection of patterns and rules governing the set of analyzed data (Larose, 2006) and identified relationships between co-occurring elements. These relationships are described using association rules in the form “if antecedent, then successor.” The rules have specific quality measures: support calculated according to formula 1 (the percentage of customer responses in which the antecedent and successor of the rule occurred relative to the total number of respondents) and confidence calculated according to formula 2 (determining the conditional probability of choosing the successor if the antecedent is chosen).

$$\begin{aligned} \text{support (antecedent} \rightarrow \text{successor)} &= \\ &= \frac{\text{number of responses in which the predecessor and successor occurred}}{\text{number of respondents in the dataset}} \end{aligned} \quad (1)$$

$$\begin{aligned} \text{confidence (antecedent} \rightarrow \text{successor)} &= \\ &= \frac{\text{support (antecedent} \rightarrow \text{successor)}}{\text{number of responses from respondents in which the predecessor occurred}} \end{aligned} \quad (2)$$

All calculations were conducted using the Statistica 13.3 software and the interactive programming environment YupiterLab.

4. PRESENTATION OF RESEARCH RESULTS

4.1. Knowledge of social and ecological symbols

Ecolabels and social symbols are expressions of businesses' engagement in initiatives aimed at helping solve environmental and social issues.

The results of the conducted analysis of customer responses are presented in Chart 1.

Among ecological symbols, the most recognized turned out to be the *Do not litter* symbol, with 37% of respondents declaring familiarity. The least known symbols were the *EU Ecolabel* (7%) and the *Green Dot* (13%). Regarding social symbols, the most well-known ones are those placed on alcoholic beverages: *I never drink and drive* (55%) and *Alcohol Only for Adults* (48%), while the least known is *Mom, Dad, I prefer water!* (22%). The visible, significant disparity in the recognition of these two types of symbols confirms hypothesis 1.

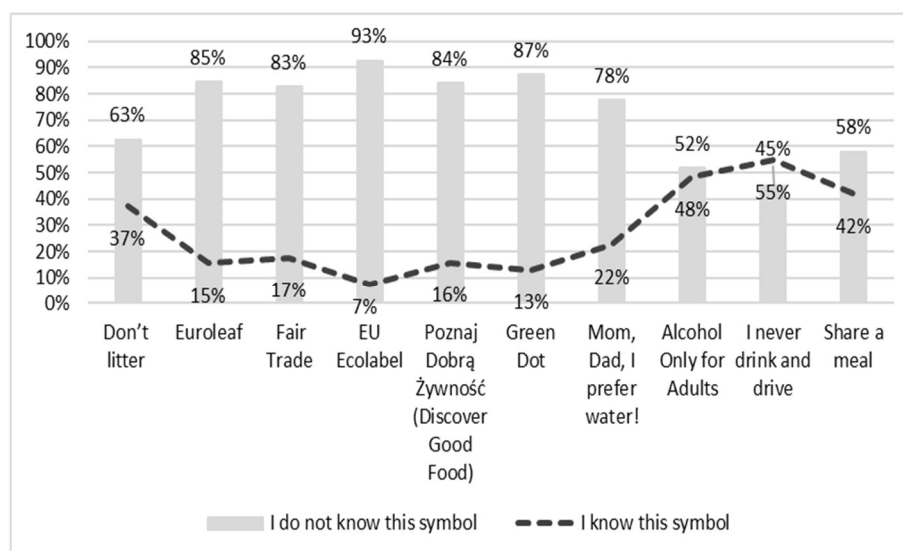


Chart. 1. Knowledge of ecological and social symbols

Source: own study.

It can be observed that the four most recognized symbols are primarily characterized by having non-symbolic names, directly conveying their essence. The names of two of them take the form of imperative mode, and the other two provide a very clear and specific message to anyone encountering such a symbol. Unambiguous names that do not require customers to search for information about the meaning of the symbol undoubtedly contribute to their more frequent recognition and association with specific issues that businesses want to highlight/address. Therefore, familiarity with these symbols may stem from the specificity and simplicity of their nomenclature, which helps identify them with specific behaviors or measures.

4.2. Knowledge of ecological and social symbols as a determinant of customer purchasing behavior

To determine whether there is a statistically significant relationship between purchasing products from entities undertaking pro-environmental and pro-social initiatives and whether customers are familiar with ecological and social symbols, further analyses and tests were conducted. Given that the examined variables do not have a normal distribution (Shapiro-Wilk test statistic W ranged between 0.801-0.808; $p=0.000$), the relationship between them was assessed using non-parametric tests.

Firstly, a synthetic indicator reflecting the number of symbols known was created for each respondent. For ecolabels, it took integer values $\langle 0-6 \rangle$, and for social symbols, $\langle 0-4 \rangle$. Subsequently, significance tests for one-way analysis of variance Kruskal-Wallis were conducted to examine whether the indicator value differentiates customer purchasing behaviors. The test statistic values confirmed that knowledge of ecolabels significantly differentiates the frequency of customers purchasing products from entities setting environmental goals: doing more than the law requires for the environment ($H=14.609$;

$p=0.023$), the use of eco-certified raw materials in the production process, even if they are more expensive than non-certified raw materials ($H=26.833$; $p=0.002$), taking measures to reduce the consumption of resources and energy ($H=21.851$; $p=0.013$). The relationships between the examined variables are presented in Table 2.

Table 2. Frequency of customers purchasing products from entities undertaking environmental initiatives, and the indicator of knowledge of ecolabels

Measure / Frequency of making purchases	Indicator of knowledge of ecological symbols						
	0	1	2	3	4	5	6
Doing more than the law requires for the environment							
Never or rarely	27%	22%	20%	17%	14%	0%	11%
Sometimes	45%	48%	51%	30%	43%	54%	47%
Often or always	28%	30%	29%	53%	43%	46%	42%
The use of eco-certified raw materials in the production process, even if they are more expensive than non-certified raw materials							
Never or rarely	33%	25%	24%	20%	7%	0%	0%
Sometimes	38%	46%	36%	30%	43%	45%	44%
Often or always	28%	30%	40%	50%	50%	55%	56%
Taking measures to reduce the consumption of resources and energy							
Never or rarely	24%	23%	18%	12%	7%	8%	11%
Sometimes	47%	41%	40%	33%	43%	37%	22%
Often or always	29%	36%	42%	55%	50%	55%	67%

Source: own study.

Based on the data presented in Table 2 and the heat maps included in it, it can be concluded that the knowledge of ecolabels positively influences the frequency of customers purchasing products from entities implementing pro-environmental measures. This is evidenced by the fact that as the knowledge of ecolabels increases, the percentage of customers who claim to never or rarely buy products from companies implementing these initiatives generally decreases. At the same time, the percentage of customers who respond by indicating that they often or always purchase goods from such entities increases. These relationships are most pronounced in the case of the second and third analyzed measures. In the case of the first recycled asphalt pavement, related to companies setting pro-environmental tasks beyond legal requirements, this dependence is somewhat less pronounced. The percentage of customers who never or rarely buy products from companies voluntarily imposing more restrictive commitments towards the environment – except for one exception – decreases as the knowledge of ecolabels increases. However, the percentage of responses indicating that customers often or always buy products from such entities only increases until the indicator reaches a value of 3. Afterward, the relationship between the variables reverses, but the percentage of responses indicating that respondents often or always buy products from entities taking these measures remains high.

It can be concluded that customers familiar with ecolabels have a higher propensity to purchase products from companies with environmental goals than those who are completely unfamiliar with ecolabels. Therefore, the truth of the second research hypothesis should be confirmed.

The impact of companies' pro-social activities on the purchasing behavior of customers does not statistically significantly differentiate whether customers are familiar or unfamiliar with social symbols. This is evidenced by the values of statistical test statistics, which are as follows for individual measures: counteracting social problems ($H=9.360$; $p=0.067$), free-of-charge performance of works/services for the benefit of the local community ($H=14.826$; $p=0.060$), material support for people in need and charities ($H=5.061$; $p=0.281$). This means that the recognition of social symbols placed on the product or its packaging is not a statistically significant determinant of the decision to purchase that product. Customers who are unfamiliar with social symbols altogether or know one or more of them buy products from companies with social goals with a similar frequency. The obtained results of testing allow for the falsification of the third hypothesis.

In light of the above considerations, it can be stated that social symbols, despite their higher recognizability, have a weaker impact on shaping the purchasing behavior of customers than ecological symbols. This may be because social symbols are not subject to the certification process. It legitimizes the pro-social activity of a given company in the eyes of customers. It is also essential that social symbols can be arbitrarily created in companies and are only carriers of information for customers, unverified by an external or certifying entity.

4.3. Willingness of customers to pay a higher price for a product with an eco-symbol or social symbol

The association rules generated in the YupiterLab programming environment allowed for the falsification of the fourth hypothesis suggesting that customers with a very good financial situation are most often characterized by a willingness to pay a higher price for a product with an ecolabel or social symbol. Among the association rules with specified quality measures (min. support=0.2; min confidence=0.5), none appeared involving customers with a very good financial situation. Among all the rules, those with the highest quality measures related to the financial situation of customers were selected (Table 3).

The conducted association analysis provides knowledge that just over half of customers with a good financial situation most often exhibit a willingness to pay a higher price for a product with a social symbol (Rule 1). 69% of them may pay more for a product with an ecolabel (Rule 2). It is worth emphasizing that as many as 50% of this group of customers simultaneously declared their willingness to incur a higher cost of purchasing both a product labeled with an ecolabel and a social symbol (Rule 3).

The statement that customers evaluating their financial situation as good more often than the entire surveyed population declare a willingness to incur a higher cost of purchasing products with an ecolabel and a social symbol is confirmed by higher confidence measures of association rules 4 and 6 compared to rules 5 and 7.

Table 3. Form of association rules along with measures of their quality

No.	Antecedent	Successor	Quality measures of the rule
1	Good financial situation	I am willing to pay a higher price for a product with a social label	confidence: 0.546 support: 0.221
2	Good financial situation	I am willing to pay a higher price for a product with an eco-label	confidence: 0.688 support: 0.278
3	Good financial situation	I am willing to pay a higher price for a product with an eco-label; I am willing to pay a higher price for a product with a social label	confidence: 0.503 support: 0.203
4	Good financial situation; I am willing to pay a higher price for a product with a social label	I am willing to pay a higher price for a product with an eco-label	confidence: 0.920 support: 0.203
5	I am willing to pay a higher price for a product with a social label	I am willing to pay a higher price for a product with an eco-label	confidence: 0.901 support: 0, 435
6	Good financial situation; I am willing to pay a higher price for a product with an eco-label	I am willing to pay a higher price for a product with a social label	confidence: 0.730 support: 0.203
7	I am willing to pay a higher price for a product with an eco-label	I am willing to pay a higher price for a product with a social label	confidence: 0.685 support: 0, 435

Source: own study.

4.4. Purchasing behavior of customers of different ages

To verify the validity of the fifth hypothesis regarding the relationship between the age of customers and the frequency of purchasing products from companies implementing pro-social and pro-environmental activities, a Kruskal-Wallis ANOVA test was conducted. The results of the testing are presented in Table 4.

Table 4. Purchasing behavior and the age of customers

Working		Values of test statistics
Pro-social	Doing more than the law requires for the environment	H=18.663 p=0.001
	Taking measures to reduce the consumption of resources and energy	H=3.171 p=0.204
	The use of eco-certified raw materials in the production process, even if they are more expensive than non-certified raw materials	H=0.087 p=0.957
Eco-friendly	Counteracting social problems	H=25.060 p=0.000
	Free of charge performance of works/services for the benefit of the local community	H=11.306 p=0.003
	Material support for people in need and charities	H=0.499 p=0.779

Legend – Bold values of test statistics indicate the result of a statistical test to reject Ho.

Source: own study.

For one environmental measure and two socially responsible measures towards society, a statistically significant relationship between the age of customers and their purchasing decisions was observed. Upon closer analysis of the data (see chart 2), it can be noted that the company's environmental measures beyond legal requirements often or always motivate 30% of customers in the youngest age group to make a purchase, while in the other age groups, this percentage averages at 19.5%. Additionally, 22% of individuals under the age of 35 declare that engaging in the mentioned measure rarely or never leads to the purchase of a product from an entity implementing it. For other customers, this percentage is higher, averaging at 35%. Therefore, it can be concluded that the discussed socially responsible measure more frequently influences the purchasing behavior of individuals under the age of 35 than older customers.

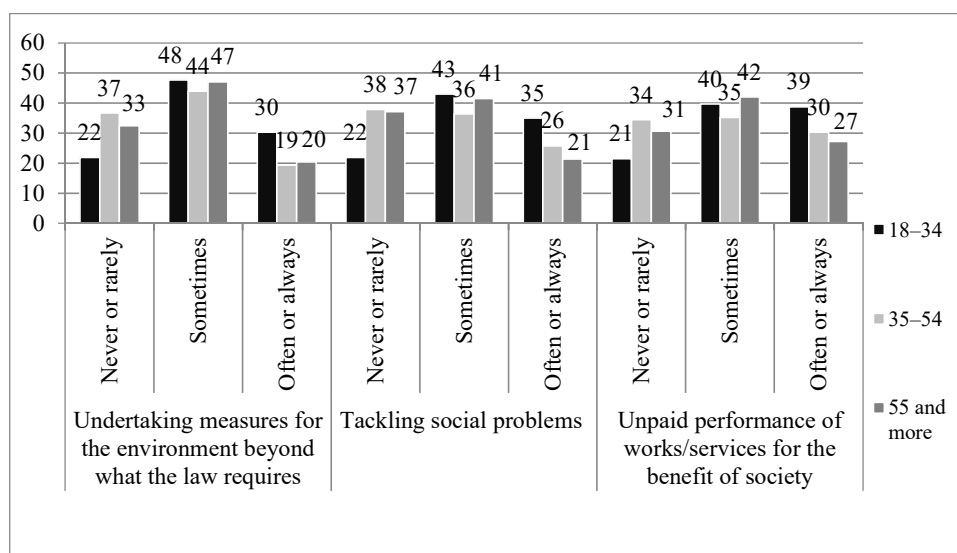


Chart 2. Impact of implementing proecological and environmental measures on the purchasing behavior of customers of different ages.

Source: own study.

Similarly to the measure described above, purchasing behaviors of customers of different ages are influenced by the company's efforts to address social issues. Often or always, under the influence of such measures, 35% of individuals under the age of 35 decide to purchase goods from entities implementing them, while only 23.5% of older customers cite this as a reason for making a purchase. A noticeable disproportion can also be observed in the responses of customers declaring that the company's measures aimed at solving social problems rarely or never shape their purchasing behaviors. This response was least frequently indicated by those under the age of 35 (22%). On average, 37.5% of older customers rarely or never buy products from entities addressing societal issues.

Performing unpaid work for society by a company very often leads to the purchase of its products by customers under 35 (39%). The percentage of responses suggesting that customers very often purchase goods from entities undertaking such measures is lower both in the 35-54 age group (30%) and among respondents aged 55 and over (27%).

The data presented in Figure 2 allows us to conclude that socially responsible measures benefiting society and the silent stakeholder of companies – the environment – most often shape the purchasing decisions of the young customer segment, up to 35 years old. The higher sensitivity to social and environmental issues among customers under 35 may be due to the fact that they are largely individuals undergoing education or have recently completed their education – these issues are often the subject of consideration during university courses. The research results partially confirm hypothesis 5. It holds true for three out of the six socially responsible measures included in the study.

5. SUMMARY AND CONCLUSIONS

The number of alternative products on the market that cater to the same needs of customers is increasing. Companies can offer a product very similar to those offered by competitors with relatively low costs. This makes the properties and characteristics of products (e.g., appearance, quality) not necessarily crucial in shaping customers' purchasing decisions. What becomes crucial is what the customer gets along with the product – satisfaction, a sense of participation in solving social and environmental problems.

Knowledge about customers' buying behaviors is important for companies planning their actions based on it. The research results presented in this work provide new knowledge to economic entities that want to influence customers' purchasing decisions through the implementation of pro-social and pro-environmental measures.

The study results demonstrated that social symbols are significantly better recognized by customers than ecological symbols. Nevertheless, companies placing these symbols on their products should make efforts to increase their recognition to build trust among customers towards the branded products over the long term and strengthen their attachment and loyalty to specific goods or brands. A way to increase the visibility of ecological and social symbols is to provide concise, textual information about them directly on the product or its packaging. This will contribute to spreading knowledge about the symbols, especially in the case of eco-labels, resulting in an increase in the sales volume of products labeled with them. Customers, especially those sensitive to social and environmental issues, will perceive them as superior to unlabeled goods, may trust them more (especially in the case of certified symbols), and feel a stronger need to purchase them.

Companies should formulate names for symbols that convey information about their socially responsible measures in a way that is simple and directly related to the essence of these measures, even at the expense of the conciseness of the symbol's name. Names should allow customers to intuitively understand what they represent. In the case of social symbols, this is facilitated by the fact that they are not subject to certification, and their names depend on the creative ingenuity of companies. On the other hand, business entities wanting to place certified ecological symbols on products are deprived of the freedom to name them. Companies can create individual marks, which, despite voluntarily imposed restrictions by the company, will not have confirmation of their compliance with external certifying bodies in the eyes of customers.

Customers with a good financial situation are most often willing to pay a higher price for a product marked with an eco-label or a social symbol. Both in this group and among all customers, a greater willingness to incur a higher purchase cost with an eco-label than a social symbol was declared more frequently. For companies, this means that they should shape the pricing policy of products with an ecological and social designation differently.

Higher prices for eco-labeled products will probably be accepted by a larger proportion of customers than in the case of products with a social symbol. However, providing customers with credible and verifiable information about the product is a condition, as demonstrated by research (Sołtysiak, Zając, 2022). Therefore, in the case of the latter goods, the pricing policy should be determined more cautiously.

The involvement of companies in measures related to addressing social problems; performing unpaid work/services for society; undertaking pro-environmental activities beyond those required by law most often influences the buying behaviors of the youngest customer segment (up to 35 years old). The effectiveness of influencing the buying behaviors of individuals under 35 through the implementation of pro-social and pro-environmental tasks is higher than in other customer segments.

Companies can strengthen the relationship between implementing these initiatives and customer purchasing decisions by conducting extensive and comprehensive informational campaigns on this topic. This will inform and reassure customers that the company sets social and environmental goals that it strives to achieve. It is essential to present credible, verifiable data on the achieved effects. However, it may be necessary to adapt communication tools to the preferences of customers from different age groups, performing different social roles, to increase the chances of influencing their purchasing decisions.

Conclusions drawn from the conducted research are of an applied nature. They can contribute to the development of companies by increasing the efficiency of using resources for the implementation of socially responsible tasks, which is extremely important given the limited resources. Companies can implement those measures that most strongly influence customers' purchasing behaviors. Additionally, by implementing the recommendations presented in this work, companies can more effectively influence their buying behaviors by adapting marketing messages to the level of knowledge, e.g., about eco-labels and social symbols. Ultimately, this may translate into an improvement in sales volume and an increase in profits achieved.

Research and practical limitations:

One should be aware of the limitations in generalizing the conclusions from the study described in this work. The research was conducted in one of the voivodeships in Poland; therefore, caution should be exercised when making generalizations about the conclusions presented in the dissertation, even in relation to customers living in regions with similar economic, social, and political situations. However, the research methodology presented in this work has a universal character and can be used to conduct studies in other geographical regions.

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THE USE OF E-LEARNING TOOLS IN TRAINING AND THE DEVELOPMENT OF SOCIAL-DIGITAL COMPETENCES IN THE GENERATIONAL Z GROUP

This paper analyzes the socio-digital competencies developed by Generation Z as a result of using remote tools in education, training, and remote work. The research was conducted with quantitative and qualitative methods, using a proprietary online survey and interviews with students. The survey, created in MS Forms, included closed, semi-open, and multiple-choice questions. One hundred and fifty-one economically active second-year students of Management and Production Engineering at the Wrocław University of Economics in the 2020/2021 summer semester were surveyed. Results indicated that remote learning tools contribute to the development of both social competencies (such as creativity, motivation, emotional intelligence, communication skills, and cognitive curiosity) and digital competencies (e.g., design, use of media and applications, ability to protect information/data, ability to use information/data, and handling AI). As a result, examples of social-digital competencies were proposed, such as proficiency in creative design or the ability to achieve digital comfort. The conscious development of these competencies by the management of modern companies is expected to better respond to the needs of Generation Z.

Keywords: e-learning tools, training, socio-digital competences, Generation Z.

1. INTRODUCTION

Today, we have no doubt that we operate in the era of a knowledge-based economy, in which knowledge becomes the main factor in an organization's success. An important component of this knowledge are competencies, which should be understood as human skills, attitudes and behaviors. In our research, we focus on the development of socio-digital competences in the Generation Z group, i.e. young people who are just entering the labor market. Why socio-digital competences? The answer seems quite obvious - young people surrounded by technology from birth cannot imagine functioning without it, often neglecting the social aspects of functioning that are still important for employers. We would like to point out that these competences can be developed by introducing

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remote tools into the teaching process, which can be used at various stages of education and professional career, making learning more interesting and accessible for young people.

Generation Z, also referred to as C (from the words connected, communicating, content-centric, computerized, community-oriented, always clicking), “iGeneration” or “Net Generation”, is a generation brought up in the era of digital technology (Euromonitor International, 2011) which enables you to work, learn and communicate from anywhere at any time. The literature indicates that this technology has become the identity of the Zetas (Singh and Dangmei, 2016), that this generation lives in a virtual space, completely unaware of the world without phones, laptops, tablets, the Internet and other electronic gadgets. Its representatives are able to function simultaneously in the real and virtual worlds, and the smooth transition from one to the other is not the slightest problem for them (in the opinion of Generation Z themselves, both worlds complement each other).

It is clearly visible that today's young people live in completely different conditions than their predecessors from several years ago. The world of the young generation – characterized by unprecedented development of new technologies – is today largely the world of the media, which co-create a powerful media environment. However, the concept of media must now be understood much more broadly than before – it is not only technical means used to record information in time or transmit it in space⁴, i.e. technologies enabling communication, but also cultural systems – social and cultural practices that support these technologies. accompany⁵ and are often forced by them. The currently popular term “media convergence” is gaining a new meaning. In the traditional sense, it meant the integration of technology, the best example of which is a mobile phone containing in one housing – in addition to the phone: a camera, a video camera, a TV, a radio, an MP3 player, games and Internet access (Morbitzner, 2012).

These changes should encourage employers, universities and training units to revise the previously used methods of increasing competences, which are often based on traditional teaching methods. Bearing in mind that competences concern the possibility of integrated use of abilities, personality traits, but also acquired knowledge and skills, in order to lead to the successful implementation of a complex mission within the enterprise (Lévy-Leboyer, 1997), they should be developed in relation to the different needs of representatives different generational groups, because development methods that worked in the past may and probably will not support the development of the youngest generations today.

The answer to the question “Why socio-digital competences?” so it seems obvious. Young people surrounded by technology from birth cannot imagine functioning without it, it seems that they cannot even function without it. They are adept at searching and filtering data and information, solving technical problems, using various applications, and communicating online, but they often neglect the social aspects of functioning. We are talking about the development of the so-called soft skills, e.g. communication skills, i.e. the ability to clearly convey thoughts (direct communication without intermediary media), coping with stress, time management, as well as assertiveness, creativity and emotional intelligence. Moreover, Generation Z exposed to multiple stimuli shows problems with concentration, their attention is scattered and the analysis and evaluation of information is very superficial (Mizuko, 2008; Friedrich, Peterson, 2010).

Analyzing the characteristics of the young generation, but also taking into account the phenomenon of the so-called limited concentration (to which Zetas seem to be subject to more strongly than previous generations), we point out that by introducing remote tools into the teaching process (which can be used at various stages of education and professional

career, making learning more interesting and accessible for young people), there will be a simultaneous development of digital competences and social.

More and more often we hear about the so-called “virtual learning environments” (Virtual Learning Environment – VLE). These are educational platforms that allow you to organize and support online learning. However, platforms are not the only tools that support the education of the young generation. There are additional tools that can be successfully used to diversify and enrich classes or training with new opportunities. Our interest focused on tools such as MIRO/Mural virtual boards, Canva, Genially, Quizizz, Kahoot.

Therefore, our goal was to identify socio-digital competences in the generation Z group, shaped by the use of remote tools in the teaching process.

2. GENERATION Z'S DEMAND FOR SPECIFIC COMPETENCES

2.1. Characteristics of Generation Z compared to other generations from the perspective of their competences

Currently, the following generations operate on the market: baby boomers (BB), generation X, generation Y, generation Z (C). Table 1 presents the generation division that is most adequate to Polish realities, taking into account specific age groups.

Table 1. Generations operating in the current labor market

Generation	Year of birth	Age in 2026 roku
Baby boomers (BB)	1946–1964	62–80
X	1965–1979	47–61
Y	1980–1989	37–46
Z (C)	1990– currently	Under 37

Source: (Wiktorowicz et al., 2016).

In the publication, we focus primarily on Generation Z, however, in order to highlight the distinctiveness of their needs and expectations – in the aspect that interests us, related to the development of socio-digital competences – it is necessary to synthetically characterize the earlier generations as well. When describing generations, we focus only on the preferences of specific generations related to the development of specific competences.

Representatives of the baby-boomer generation are characterized by attachment to the workplace, they value clear and transparent rules, remaining faithful to the hierarchical order of the organization. Commitment, patience and independence are their hallmarks. Therefore, they prefer building and supplementing knowledge in the process of self-education, in the most traditional way – through reading. They also value participation in conferences and lectures conducted by specialists and authorities in their field (Łuczak, 2013). Generation X – witnesses of the crisis of the 1970s, people fighting for a better status, achieving their goals on their own – values work that enables success. Xs are reliable, solid, value independence and autonomy, and at the same time fit in well in a group (better than their predecessors). The experiences that shaped them significantly influenced their preferences related to the ways of developing knowledge and skills. In this group, methods that provide the opportunity to independently develop their own solutions,

but also workshop work and case studies, during which they can cooperate as a team, turn out to be useful. The literature indicates that although Y have mastered information technology, they prefer book calendars and archiving documents in a traditional way (Wiktorowicz, Warwas, 2016). Open to both positive and negative feedback, they willingly use coaching as a method to develop their competences (Silberman, Biech, 2016).

Generation Y is the first generation that had access to modern technologies. They grew up in the period of development of websites such as YouTube, Skype applications and social networking sites (Gutowska, 2019). The main Y values are: optimism, idealization, diversity, ambition, creativity, initiative, innovation, education and training. The multitude and variety of stimuli reaching them from an early age have resulted in them mastering the ability to function in conditions of strong stimulation and are able to perform many tasks simultaneously without much difficulty. They gained practice when they were still teenagers, dividing their attention between playing music, writing text messages and doing homework (Wiktorowicz et al., 2016; Waśko, 2016). Generation Y are people used to tests, short-cut thinking, who do not like to waste time. They need constant stimulation and access to new knowledge, so the forms of work they have no difficulties with are searching for answers to questions in online sources, e-learning and webinars, instead of traditional training in the classroom (Gutowska, 2019).

Generation Z, also known as Generation C (from the words connected, communicating, content-centric, computerized, community-oriented, always clicking), “iGeneration” or “Net Generation”, is a generation raised in the era of digital technology (Euromonitor International, 2011), which has become – as indicated in the literature on the subject – their identity (Singh and Dangmei, 2016) and which enables work, study and communication from anywhere at any time. Zets, to an even greater extent than their direct predecessors – Y – live in a virtual space, they do not know the world without phones, laptops, tablets, the Internet and other electronic gadgets. Using these devices is second nature to them and allows them to process huge amounts of information at high speeds, which is what they are used to and need (Euromonitor International: Strategy Briefing, 2011). The phone is the main communication tool for Generation Z, but they also use it to take photos, record videos and learn. On the one hand, young people are very comfortable using modern technology and treat its ubiquity and accessibility as something normal. They can function simultaneously in the real and virtual worlds and smoothly transition from one to the other. In the opinion of the Zetas themselves, both worlds complement each other. Constant access to various mobile devices and applications makes communication (time spent on online communication) with others possible from anywhere and at any time. On the other hand, most representatives of Generation Z can no longer imagine life without new technologies and the Internet, to which they are connected 24 hours a day, 7 days a week. They often emphasize that they are addicted to it. Many researchers draw attention to a disturbing phenomenon: young people, living online, impair their verbal communication skills, establishing interpersonal contacts in the real world, i.e. social skills. When exposed to many stimuli at the same time, they also have problems with concentration, their attention is scattered, and the analysis and evaluation of information is very superficial (Mizuko, 2008; Friedrich and Peterson, 2010). Generation Z is much more vulnerable to mental health problems. It has the highest rate of diagnosed depression (Schroth, 2019). This poses challenges not only to potential employers, but also to training units and universities which, in order to reach this group, must verify the methods of teaching, training and development currently used. Therefore, reading the documents from Zeta's point of view will not be attractive or effective. Instead of lectures or scenes, in their

case (as in the case of Generation Y), it is worth introducing online games and simulations that can provide knowledge about the level of competences, and at the same time contain elements of gamification – earning points, prizes, badges, challenges related to the ability to move to the next level. levels, competitions and rankings. Zetas also prefer webinars, videoconferences, and online quizzes, which can be participated in from their phones (Gutowska, 2019). Research shows that Generation Z is connected or online at least an hour a day and up to 10 hours a day. Spends 41% of time outside the classroom/training room on a computer or mobile device (to stay in touch with friends, stay up to date with the news). 1 in 4 likes social media because of its speed and ease of use. Prefers multitasking and using multiple screens to connect and communicate. Accepting new information only through words does not appeal to Generation Z. Watching videos on YouTube, i.e. the multimedia nature of the reception, allows students to go beyond ordinary reading and experience it virtually. They would like YouTube videos to supplement their academic classes. 33% watch online lessons (Seemiller and Grace, 2016).

Figure 1 graphically summarizes the impact of generational affiliation on the hierarchy of media importance for the generations present in the modern labor market. It is clearly visible what transformations have taken place over the years. The book, considered the most important in the Baby Boomer generation, gradually gave way to media such as TV, laptop and telephone until it lost its value in the youngest generation. A desktop computer and a mobile phone, which constitute Generation X's first contact with new technology, significantly change their form in Generations Y and Z, becoming a portable computer and a smartphone. Generation Z also includes a tablet, which provides even greater mobility and convenience of use.

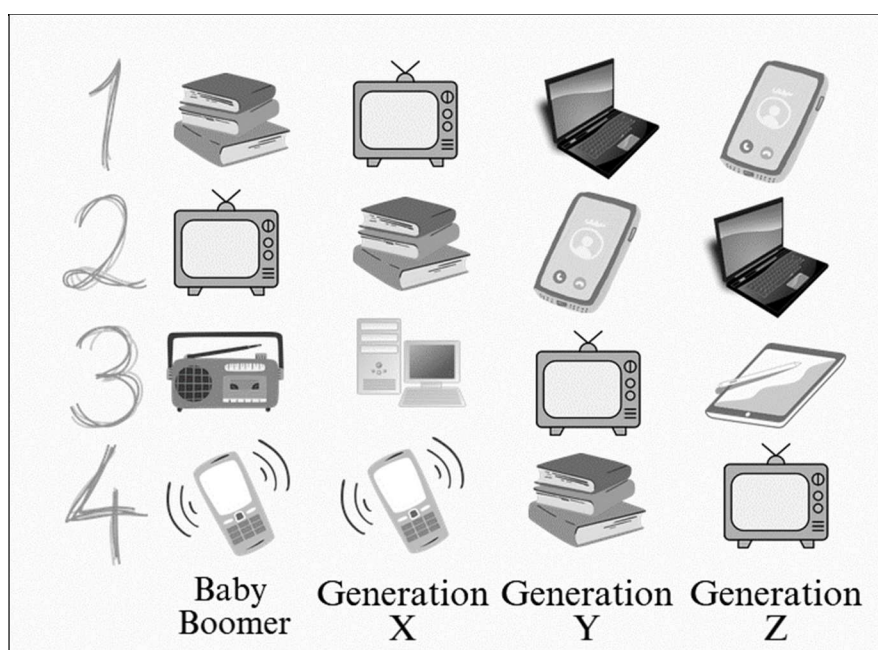


Figure 1. Hierarchy of media importance for generations present on the modern labor market

Source: own study based on: (Sadowski, 2018).

Against the background of the characterized generations (Table 2), we also present how the approach to issues related to development has evolved over the years. As you can see, for the baby boomers and Generation X, developing competences was a condition for maintaining their jobs. We observe an increase in interest in expanding competences from generation Y, which is equally emphasized in the case of generation Z, which interests us.

Table 2. Employee expectations related to training and development

Baby boomers	Generation X	Generation Y	Generation Z
Training and development as a condition for keeping a job. Resistance to change, so it is difficult to motivate them to acquire new qualifications	Training is treated as an employment anchor, enabling employment stabilization.	Lifelong learning is a way of life. A high pace of knowledge acquisition is observed here.	Continuing education. Preferences for self-education. Striving to obtain higher and higher qualifications.

Source: own study based on: (Smolbik-Jęczmień, 2017; Smolbik-Jęczmień, 2013).

2.2. Characteristics of socio-digital competences

The term “competence” in management science appeared with the increasing importance of human capital. This means that the development of competences was not always treated as a priority. Nowadays, it is believed that human resources should “acquire” knowledge continuously, through continuing education. In scientific studies, the concept of competence is used to define “human dispositions achieved through learning. In this approach, competence is understood as a learned [...] – level of efficiency that determines effective behavior in a given field” (Kęsy, 2008). According to C. Levy-Leboyer (1997), competences concern the possibility of integrated use of abilities, personality traits, but also acquired knowledge and skills, in order to successfully complete a complex mission within the enterprise. Bearing in mind that the previously characterized generations currently operate on the market: baby boomers (BB), generation X, generation Y, generation Z (C), it is reasonable to develop these competences in relation to the different needs of their representatives.

Various types of competences are presented in the literature (Kęsy, 2008). In this study, we focus on socio-digital competencies, which in our understanding refer to a general classification that divides competencies into soft (also referred to as behavioral or social) and hard (referred to as technical) (Armstrong, 2011). Soft skills are personal attributes that improve an individual's interactions and performance at work, while hard skills refer to an individual's skill set and ability to perform a specific type of task or activity (Hendarman, Tjakraatmadja, 2012).

Social competences, according to A. Matczak (2005), are “complex skills that determine the effectiveness of emotional regulation and coping with various types of social situations”. This definition shows that we cannot talk about one general social competence, but about many types, as we show in Table 3.

Table 3. Examples of social competences

Competence area	Proficiency assessment
Collaborative competences	interpersonal skills, e.g. emotional intelligence, teamwork skills, providing help and support, mitigating conflicts, effective and harmonious cooperation with people, communication skills, creativity, commitment
Social/communication competences	skills in establishing and maintaining contacts, initiating social relationships, cooperation, communication, positive attitude
Social resourcefulness	ability to carry out tasks that require obtaining something from other people, focusing on the goal
Assertive competences	ability to influence others, listening skills, negotiation skills
Mental competences	ability to cope with social situations. They are related to the ability to manage oneself, i.e. the ability to plan, anticipate, cope with stress, time management, as well as the ability to motivate oneself, assertiveness, creativity and emotional intelligence.
Cognitive competences	the ability to sense reality, use language, ability to think, in particular creative thinking (creativity), memory, imagination and feeling emotions.

Source: Own study based on (Paprocka, Terlecki, 2000; Konieczna-Kucharska, 2015; Janiszewski, Krasiński, 2017).

Digital competence can be defined in various terms such as information and communication technology literacy, computer literacy, ICT competencies, technology literacy and digital literacy (Kassim, 2021). According to the definition, digital competences are

a set of information competences including the ability to search for information, understand it, as well as assess its credibility and usefulness, as well as IT competences, which include the ability to use a computer and other electronic devices, use the Internet and use various types of applications. and software, as well as creating digital content" (Matusiak, 2020).

Table 4 provides examples of these competencies.

The literature indicates the need to develop both groups of competences in parallel, and what is more, social competences are treated as the so-called Transferable competences, i.e. those that can be used in many professional and personal situations. They are therefore particularly useful when performing complex professional activities and solving complex problems, including those that require teamwork. A high level of the indicated types of competences facilitates running a business and may also be a factor supporting the development of entrepreneurship as such. This means that they should be developed simultaneously. Jelonek (2014) points to this when he writes that both groups of competencies are not mutually substitutable, but rather complementary. Nowadays, the development of soft skills should take place not so much as part of specialized courses and training, but thanks to innovative didactics – the learner should acquire hard and soft skills in parallel (Jelonek, 2014).

Table 4. Examples of digital competences

Competence area	Proficiency assessment
Information and data literacy	Browsing, searching and filtering data, information and digital content Evaluating data, information and digital content Managing data, information and digital content
Problem solving	Solving technical problems Identifying needs and technological responses Creatively using technologies Identifying digital competence gaps
Safety and security	Protecting divides Protecting personal data and privacy Protecting health and well-being
Digital content creation	Developing digital content Integrating and re-elaborating digital content Copyright and licenses Programming
Communication and collaboration	Interacting through digital technologies Sharing through technologies engaging in citizenship through digital technologies Collaborating through digital technologies Managing digital identity

Source: Own study based on (Kassim, 2021).

3. E-LEARNING TOOLS AS A TRAINING ELEMENT

E-learning in scientific literature is presented primarily in the context of distance education at various levels of education. This concept increasingly began to occupy the attention of various authors after the outbreak of the COVID-19 pandemic. The terms e-learning, remote teaching or distance learning can be used not only in the educational context, but also as part of training at universities and in the workplace. In the case of e-learning forms, we can distinguish a vertical system in which there is a teacher/trainer - student/listener relationship. In addition, horizontal communication: student-student or listener/listener may play an important role. In these times of threat, when travel and contacts between students are limited by nature, remote cooperation can bring tangible results. This is written by, among others, M. Masterson (University of Limerick, Ireland), who organized long-term online cooperation in learning a foreign language between students from different countries and cultures. It turned out that a well-designed course and its efficient implementation resulted in similar positive results among students as before the pandemic (Masterson, 2020).

E-learning is now becoming an effective tool for gaining knowledge and improving qualifications. In the 1990s, the first e-learning platforms were created. Their main task was to manage training in the organization (Palka, 2014). The use of e-learning in the context of training conducted at students' homes and remote education became possible after connecting computers/laptops to modern communication technologies. These changes made it possible to conduct distance courses and adapt the courses to the needs of their recipients. A smooth flow of information requires the creation of specialized tools

with a high degree of interactivity. To enable these systems to cooperate, it was also necessary to develop new standards unifying the method of data storage and presentation (Moliga, 2015). The rapid development of the Internet and the ongoing computerization of society have become the main reasons for the rapid development of distance educational services. These changes enabled the creation and dissemination of so-called e-learning platforms, i.e. software sets enabling online classes and remote support for students. The term “virtual learning environment” (VLE) is increasingly being replaced. This concept is more general and covers all processes related to online teaching. Educational platforms are computer systems that allow you to organize and support teaching via the Internet. We also call them the abbreviation LMS, which comes from the English term Learning Management System. The basic tasks of these systems consist in collecting teaching materials, organizing them and making them available to recipients via the Internet. E-learning platforms are extensive applications that facilitate the creation, running and administration of educational courses. These are, in fact, integrated sets of tools that allow you to achieve more specific goals related to teaching, in particular with managing the course and its resources. This is a specialized website with a didactic profile. It usually consists of a portal part – information, available to everyone, and a zone of authorized access to knowledge resources and communication tools. The basic functions of the e-learning platform include: providing authorized users with didactic content intended for them, providing space and tools for the implementation of the educational process, enabling tracking and assessment of progress in the educational process, administering didactic content, users and their groups and access rights, and also generating statistics (Dąbrowski, 2013). Currently, the most popular e-learning platforms include MsTeams, Zoom and Google Meet.

Most of the e-learning platforms used so far provide materials mainly for individual study, after which students take various forms of assessments also individually. Group communication was and is often reduced to the exchange of correspondence in an asynchronous mode or to online text chats in a synchronous mode. However, if you look at the percentage of synchronous and asynchronous work, the former was only partial.

However, platforms are not the only tools that support remote education and training. There are additional tools that can be successfully used to diversify and enrich classes or training with new opportunities. The authors' interest in the work focused on examples of several types of tools used for teamwork, individual work or to check students' knowledge. They are presented in table 5.

Each of the tools indicated in Table 5 is tailored to appropriate tasks and thus develops different sets of competences among their users. Among the large group of tools that support the educational process, we would like to show several examples, e.g. virtual whiteboards, tools for designing, creating visual and interactive content or for conducting knowledge tests. It is worth pointing out that the young generation, which needs constant stimuli, is a grateful recipient of this type of solutions. Referring to the concentration curve, according to which after about 20 minutes the listener in the training or the student at the desk loses interest, these tools allow the listener to be reactivated.

Table 5. Description of the use of selected e-learning tools

Type of tool	Characteristics
Miro/Mural virtual boards	Scaled, cross-device-ready electronic whiteboards that enable real-time collaboration in distributed or fully remote teams.
Canva	It allows you to create graphic designs using a database in the form of a library of templates, which can be quickly, easily and intuitively modified. Among other things, the tool allows you to create infographics, multimedia presentations, posters, resumes or flyers.
Genial.ly	The tool helps create interactive content, multimedia presentations, infographics, games, escape rooms and reports. It allows aggregating multiple contents simultaneously on a single slide in a clear and minimalistic way.
Wordwall	It allows you to create online and offline exercises and interactive tasks. In addition, it allows you to use available templates and edit them as you see fit.
Quizizz	Lets you create quizzes and use already available templates for your own use. The tool is used to create pre-tests and post-tests.
Kahoot	The tool is used to create games, quizzes, ask questions organize votes. Checking the effects of cooperation is possible thanks to the possibility of generating reports.

Source: Own study based on (Canva, 2022; Genial.ly, 2022; Kahoot, 2022; Miro, 2022; Mural, 2022; Quizizz, 2022; Wordwall, 2022).

4. RESEARCH METHODS USED

The adopted research procedure was based on the analysis of secondary and primary data. The first one included literature research. The analysis of primary data included: a survey and informal interviews - it was therefore both quantitative and qualitative in nature. For the purposes of the study, an original online survey was developed. The survey contained three types of questions, i.e. closed questions with suggested answer options, and semi-open questions in which the respondent, in addition to choosing the prepared answer options, could also enter his own answer. The answers to the questions were presented graphically and descriptively due to the nature of the questions asked.

When formulating the survey, the authors tried to obtain answers to the following questions:

- Did the tool used contribute to the development of new competences among students?
- What competencies did students develop by working with remote tools during online classes?

The survey was prepared in MS Forms and conducted using the indicated application. A total of 151 students studying at the Faculty of Production Engineering at the Wrocław University of Economics (Poland) were surveyed. In the study group, the respondents included both women, who constituted 66%. respondents and men 34%. The analyzed group is people aged between 21 and 28. These were second-cycle students studying full-time (54%) and part-time studies (46%). The study group included both professionally active (76%) and unemployed (24%) students. The period of the study was the summer semester 2020/2021.

5. RESULTS OF THE RESEARCH CONDUCTED

During the research, the authors asked what tools the respondents used during their education. As can be seen in Figure 2. We assume that this distribution of responses – with the predominance of responses to virtual whiteboards – results from the fact that academic staff have been trained in their professional use. At the same time, these are tools that are very often used in business practice. Boards are technological solutions that guarantee effective remote work for project team members, the ability to transfer and collect data, and constant access to it. As for Quizizz, according to the intention of the application's creators, it can – as indicated above – be successfully used to create pre-tests and post-tests, which are a very common element of trainers' training activities. This is about the possibility of checking the knowledge level both before and after the training, which is to show knowledge gains.

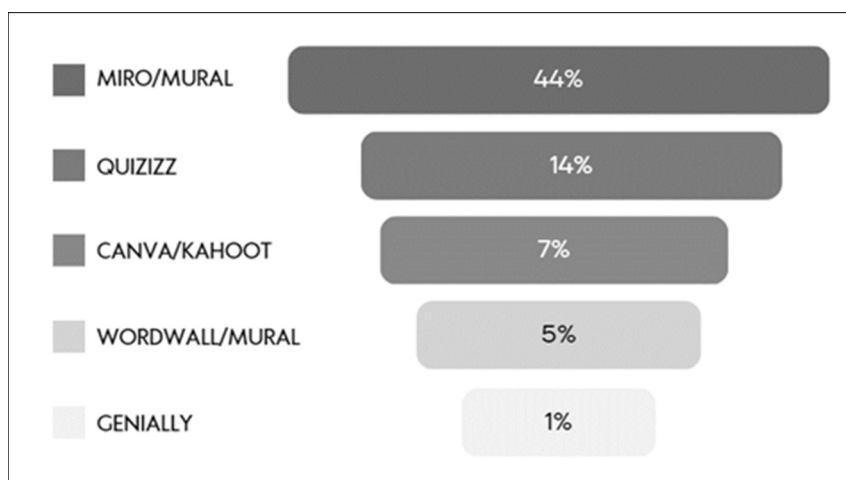


Figure 2. E-learning tools used by respondents

Source: Own study.

Next, the authors asked the respondents whether the use of these tools contributed to the development of their new competences. Respondents indicated (Figure 3) that these tools develop, among others, creativity, motivation, emotional intelligence, communication skills, cognitive curiosity – as part of social competences, and design, use of media and applications, ability to protect information/data, ability to use information/data, AI support – as part of digital competences.

As the figure above shows, based on the respondents' responses, the authors created the concept of social and digital competences, naming them appropriately. This is how the competencies were created:

- creative design,
- perseverance/consistency in using digital tools,
- the ability to achieve digital comfort,
- ability to transfer knowledge within a team and openness to new solutions.

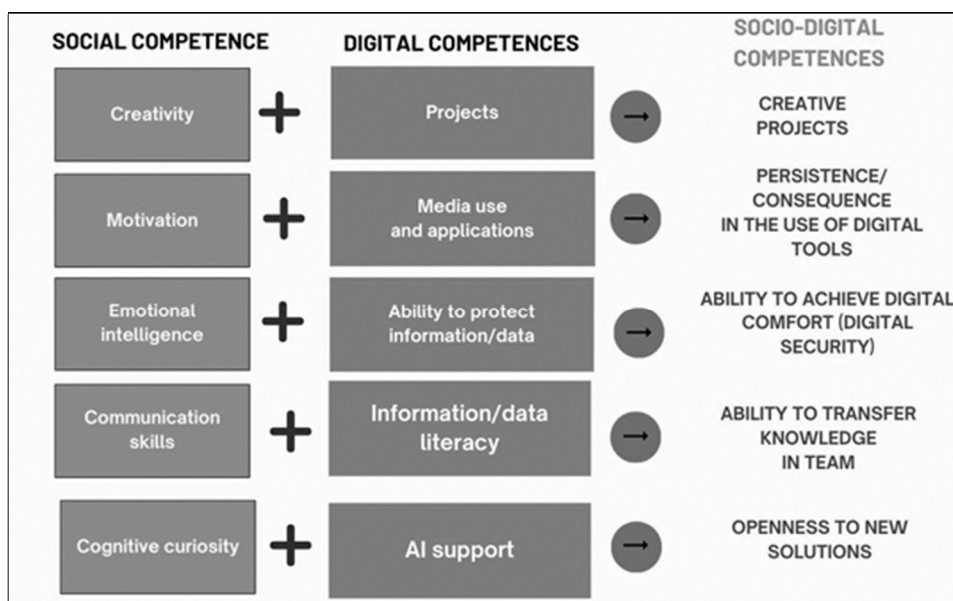


Figure 3. Selected (new) competences developed by remote tools - respondents' perspective
Source: Own study.

The indicated elements are summarized in Table 6, taking into account the competencies that they develop the most among the respondents.

Table 6. Socio-digital competences developed by e-tools

SELECTED TYPES	MIRO/ MURAL BOARDS	CANVA	GENIALLY	WORDWALL	QUIZZZ	KAHOOT
CREATIVE PROJECTS		✓	✓			
PERSISTENCE/ CONSEQUENCE IN THE USE OF DIGITAL TOOLS	✓	✓	✓			
ABILITY TO ACHIEVE DIGITAL COMFORT (DIGITAL SECURITY)	✓	✓	✓		✓	
ABILITY TO TRANSFER KNOWLEDGE IN TEAM	✓	✓				
OPENNESS TO NEW SOLUTIONS	✓	✓	✓	✓	✓	✓

Source: Own study.

The table above shows that the analyzed tools influence the development of socio-digital competences in various ways. As you can see, individual tools such as Canva and Genially develop creative design, and miro boards support the transfer of knowledge within

the team. It is worth adding that all tools increase openness to new solutions among surveyed respondents, and only some of them – Miro/Mural Boards, Canva, Genially and Quizizz increase the ability to achieve digital comfort.

6. DISCUSSION

Given the nature of Generation Z, traditional, subject-based methods of teaching information and digital literacy may not be very effective. It is crucial to adapt the form of the message to the modes of communication preferred by young people, including taking into account the importance of mobile devices. The use of pop culture elements, current symbols important to the young generation and modern communication models can help better prepare Generation Z in terms of digital and social competencies. A good solution may be the integration of educational goals – the implementation of projects that combine the learning of digital skills with other, practical goals, where technology supports the achievement of multidimensional results. Meanwhile, Polish schools often continue to ignore the potential of mobile technologies, formally limiting their use. This stands in contrast to Generation Z's natural need for constant connection and access to up-to-date information (Stunża, 2017).

As early as 2011, students expressed interest in remote forms of learning. Surveys conducted by M. Przybyła (Przybyła, 2021) indicate that their attitudes toward remote learning in universities were positive, even though the educational proposals at the time were often modest. Among more than 1,000 students at Poznań universities, as many as 58% declared their willingness to use remote learning methods and forms.

An interesting aspect is the results of the study on the relationship between the form of instruction (online vs. traditional) and the final grades obtained. The analysis was carried out on the basis of grades for the course “probabilistic methods and statistics” in the course “computer science” at the School of Banking in Gdansk. The results of the summer semester 2018/2019 (traditional classes) and 2019/2020 (remote classes taught synchronously on the Click Meeting platform using Moodle tools) were compared. In both cases – both full-time (from 3.59 to 3.83) and part-time (from 3.57 to 3.97) – there was an increase in the average grade for classes taught remotely (Wałachowska, 2021).

Regarding Generation Z's demand for remote work, it is worth citing research conducted by Capgemini in 2021. They indicate that remote work has become an equivalent form of work in professional reality. It turns out that 75% of organizations expect that at least 30% of their employees will work remotely in the next few years. In addition, approximately 70% of companies expect to benefit from reduced costs related to property maintenance and management and reduced business travel. However, the Capgemini report shows that despite the increase in productivity, employees are reluctant to work remotely permanently because it has a negative impact on their psychophysical condition. It turned out that the feeling of constant availability has a negative impact on employees. Most employees felt concerned about the long-term consequences, and half of new employees said they would quit their jobs if the only option presented to them was to work remotely. About 56% of the surveyed people were afraid that they would work without breaks for rest or personal life, and 60% young workers (aged 26–35) expected more support from the employer to cope with stress. The research shows that there is a big problem with accepting remote work by an employee. This suggests focusing on developing competences that would help reduce the stress resulting from this form of work, which in turn may lead to burnout even among people representing Generation Z. As

indicated above, in the case of the generation described, it is rest, self-development and personal life that have crucial and without harmony between these areas of life and remote work (including remote training), employee effectiveness may be lower and their willingness to work reduced. The report shows that in order to achieve the best benefits of remote work and manage employee expectations well (including those of the Generation Z we are interested in), organizations need to find the right operating model and a more sustainable, hybrid approach. One such effort by companies may be to focus on shaping the competencies we analyzed.

In 2023, a survey was conducted which illustrates the approach to work – including remote work – of students of the Faculty of Economics of the University of Gdańsk. Its aim was to determine what the young generation considers when choosing a professional career. The study referred, among other things, to determining preferences for the scope of cooperation with other employees. The responses were quite even, as 47% of people preferred teamwork and 53% preferred working alone. The preferred scope of creativity in the workplace was further explored. The answers to this question were also similar: over half (51%) prefer to have the opportunity to approach the tasks performed creatively, and the rest (49%) prefer to work based on certain patterns. Then, respondents were asked whether they were ready/inclined to sacrifice private time for professional work. The least popular were the answers regarding a greater willingness to devote private time: the answer “I am always willing” was chosen by 3% of people, and “I am often willing” by 21%. The most frequently chosen answer was “occasionally I am willing” (52%), followed by “I am not willing” (24%). The last task for the respondents was to arrange the motivators for starting and doing work, in order from the most to the least desirable. When choosing a career, respondents are most often guided by the amount of basic salary (61%), the availability of flexible working time (25%) and the possibility of working in a pleasant atmosphere (18%). Next came: job security, remote/hybrid work, opportunities for promotion and training (Konkel, 2023). This suggests that the socio-digital competences that Generation Z should develop as part of the currently decent remote work and remote training require continuous development. The work preferences determined in the study (by this generational group) indicate that their motivation and willingness to use modern solutions is lower than expected. Therefore, it can be concluded that while it is important for employees, including the Zetas, to be able to build relationships and maintain mental well-being while at work, education and the use of its remote forms is attractive when it takes place at a distance.

As described in the theoretical part of the work, subsequent generations differ significantly from each other. Therefore, it is necessary not to take shortcuts and make it as easy as possible for the youngest to achieve their teaching goals, but to adapt teaching methods to their skills. The current teaching methods used in working with representatives of Generation Z are ineffective. Therefore, it is reasonable to reach for the technological and digital achievements of the modern world, which are a natural tool for young people not only for work or study, but also an indispensable prop used in everyday functioning. Such behavior can undoubtedly contribute to increasing the attractiveness of the presented teaching content and, consequently, increasing the effectiveness of the teaching process. Additionally, these types of tools save both time and costs. For example, webinars and videoconferences enabling synchronous online learning combined with other tools, such as online quizzes, eliminate the need to travel to traditional lectures or exams and allow for faster verification of training effects.

Many studies have examined student satisfaction in synchronous online courses (webinars), asynchronous online learning management systems, and synchronous face-to-face classroom interactions (traditional learning). The results showed that webinars were descriptively more effective in promoting student learning than asynchronous online classes (Hedges' $g = 0.29$) and face-to-face classes ($g = 0.06$) (Ebner, Gegenfurtner, 2019).

It should be noted that the remote tools we describe to support the teaching process can be successfully used both during online and traditional classes.

Gutkowska (2019) points out that when preparing development activities, we cannot forget about the specificity and competences of generations present on the labor market for a little longer. Due to this, especially in groups consisting of representatives of different generations, online tools cannot completely dominate the training process and completely eliminate more traditional forms. Moreover, despite the undoubted attractiveness of new methods, in addition to knowledge, social competences are crucial on the labor market, which, according to the author, Internet tools are unable to develop. Hence, in the researcher's opinion, group interactions and discussions remain very valuable.

However, our research shows the development of both social and digital competences thanks to the introduction of the analyzed tools into the teaching process. Their use, as students indicated, was conducive to, among others: development of creative design which is a combination of creativity (social skills) and design (digital skills)

The market for training services should be shaped in such a way that the forms of teaching used respond to the expectations of representatives of different generations, while developing their knowledge, skills and social competences. Nowadays, employers provide employees with a variety of tools, arranging office space in such a way as to ensure comfort of work and stimulate creativity, they give freedom to work remotely, therefore it is possible to accomplish this task without any major difficulties through blended learning, i.e. combining traditional methods with education. using online tools (Gutkowska, 2019).

7. CONCLUSION

The result of the research became the proposal of a certain construct consisting of the analyzed competencies. Consequently, examples of social-digital competencies were proposed, such as creative design and the ability to achieve digital comfort. The conscious development of these competencies by the management of modern enterprises can respond to the development needs of the Zetas.

We are aware that tools discussed do not develop all socio-digital competences to the same extent. Their use undoubtedly promotes the development of communication, teamwork and design. However, their selection must be adapted to the subject and purpose of the training, the potential of the listeners and the trainer's preferences. Regardless of which competencies will be developed thanks to their use, they always provide added value for the listener. They are useful, for example, in diversifying activities, restoring distracted attention, they affect the sense of sight and hearing, which favors the involvement of people who perceive stimuli in a different way. This allows the interviewer to adopt the perspective of the interlocutor (the so-called ability to decenter). They also save time, allow you to quickly obtain information from many participants, but also create summaries and rankings that motivate listeners.

In addition, the socio-digital competences indicated in the research correspond to the currently popular competences of the future, such as: active learning, creativity, innovation and initiative, as well as the use, monitoring and control of technology. The Polish Institute

of Economics in the publication “Employee competences today and tomorrow” indicated that the valued competences in the future will be digital and technological competences, as well as social competences related to functioning in a group (e.g. emotional intelligence and leadership) and cognitive competences, also called competencies thinking, i.e., among others innovation, logic and solving complex problems. Transformative competences are also important, e.g. allowing for reconciling tensions and solving dilemmas, as well as adaptive competences (e.g. acting in a situation of uncertainty). Soft skills, next to technological ones, are a basic competence of the digital world. This is one of the topics that appeared in the EY panel: “ESG Perspective and HR Challenges” during the European Financial Congress 2022 (Jakóbczyk, 2023).

Generation Z is strongly attached to the digital world, therefore organizations/universities must support the development of new competences (compromise of interests). Generation Z has never lived in a world without mobile devices, they expect to be able to keep all these gadgets when going to work. They prefer organizations that are at the forefront of workplaces and that support and allow them to work regardless of geographical location and time zone barriers. (Singh, Dangmei, 2016). University authorities encourage educators to use technology because they believe this is what today's students want. They understand that times have changed from the industrial era model and their universities should follow what is current to meet the needs of their students. Universities are trying to keep up with modern technologies to increase communication with students using modern technologies (Feiertag, Berge, 2008).

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EFFECTIVENESS OF INNOVATIVE SOLUTIONS IN MULTICULTURAL MANAGEMENT BASED ON A BIG PHARMA COMPANY CASE STUDY

The globalization process, IT revolution, and technological progress in most industrial branches (e.g., pharmacy) have compelled businesses all over the world to adapt to survive. The role of human resources management has changed completely after the new needs of development induced by bringing in foreign labor employees. This paper presents the results of a study conducted in 2022 on employees of an international company. The study looks at how employees, with primarily technical backgrounds, from different countries and cultural backgrounds, develop specific social skills that allow them to efficiently communicate and perform with one another towards a common goal. For this reason, the study aimed to identify the opinions of employees and managers regarding the multicultural influence on outcomes in researched companies. The literature study, bibliometric analysis, a survey questionnaire, and structured interviews were used during the study. The employees pointed out that multicultural teams are more innovative and efficient, and they believe cultural diversity encourages growth and creativity but only if managed well. If not, it can lead to conflicts and a toxic work environment.

Keywords: Multicultural Management, Cultural Diversity, Multicultural Teams, Bibliometric analysis, Systematic Literature Review.

1. INTRODUCTION

Globalization has accelerated the process of becoming connected across time zones and geographic boundaries. Global migration as well as modern technology of the Fourth Industrial Revolution have brought many different cultures closer together in the modern workplace. At the managerial level, the landscape is changing at an impressive speed, which presents real opportunities for growth but also new challenges for leaders and employees. All these factors, render the comprehension of multicultural teams and finding strategies to optimize their effectiveness crucial to researchers.

In this article culture means the acquired information that people use to predict events and interpret experiences to generate social and professional behaviors that are acceptable. This information influences behavior through forming values, attitudes, and behaviors. Culture is passed down the generations through personal experiences and is shared by a vast number of individuals (Mohammadian, 2017). The term “multiculturalism” refers

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to the diversity of cultures. When it is talked about a multicultural team in project management, it means, a collection of people from diverse cultures that work together and apply their expertise and vision to the service of their firm (Lu, Swaab, Galinsky, 2022).

What is currently referred to as corporate culture began to take shape in the management area in the 1980s (Schein, 1985). Corporate culture is a framework of ideas and a loosely structured set of standards and values that all parties involved in the business adhere to. It includes the norms, attitudes, presumptions, values, and behaviors that members of the same organization share (Bournois, 1996).

In today's dynamic and interconnected business environment, organizations must deal with a workforce comprised of people from various cultural backgrounds. This cultural diversity presents both opportunities and challenges for managers and team leaders. On the one hand, managing cultural differences can be challenging as it necessitates an understanding of cultural quirks as well as the ability to modify leadership strategies as needed. Diverse teams, on the other hand, can bring a wide range of perspectives, abilities, skills and information to the table, allowing them to solve complex problems in novel ways that more homogeneous groups might not have been able to (Hienz, Engelhart, 2018).

The term "multicultural management" refers to the methods and techniques used to successfully lead and supervise a workforce made up of people from various cultural backgrounds. Understanding the various points of view, values, beliefs, and customs that each team member brings to the table is essential. Organizations can greatly benefit from a multicultural workforce by cultivating an inclusive and respectful culture. These benefits include enhanced creativity, innovation, and problem-solving abilities (Canen, A.G., Canen, A., 2012). Communication gaps are the primary barrier to managing a culturally diverse workforce; however, closing these gaps can be difficult when team members come from different cultural backgrounds. Differences in communication styles, preferences, and nonverbal cues can lead to miscommunications, misinterpretations, and potential conflicts (Sonal, 2011). Cultural differences matter because deeply ingrained cultural norms, values, and beliefs have the power to shape people's attitudes, actions, and work ethics. Navigating these differences effectively necessitates a thorough understanding of cultural quirks as well as the ability to adapt leadership styles accordingly (Misoc, 2017). Also, a lot of multicultural teams are currently operating virtually. It can be challenging to plan meetings, assign tasks, and maintain real-time collaboration when managing a team that is spread across several time zones. A seamless workflow now depends on leveraging technology wisely and adjusting to asynchronous work practices (Cagiltay, Bichelmeyer, Kaplan Akilli, 2015).

The research is organized as follows in order to better understand effective management methods for multicultural teams. An overview of the main topics in question is given in this first section of this paper, which serves as the conceptual foundation for the study. Subsequently, the researcher performs a systematic literature review, succeeded by segments that arrange the chosen literature concerning multicultural teams and multicultural management. The researcher then presents a case study of a large pharmaceutical company. The researcher concludes by summarizing, discussing, and suggesting potential directions for future research that could deepen our understanding of multicultural management.

Research questions:

RQ1. What are the determinants of effectiveness in multicultural work teams?

RQ2. What improves innovation in multicultural teams?

RQ3. What are the factors which the performance of multicultural teams?

RQ4. Which are the areas that could be the focus of upcoming research?

Tools such as: VOSviewer, author's questionnaire, in depth's interviews were used.

2. SYSTEMATIC LITERATURE REVIEW

The researcher decided to follow the systematic literature review method which was proposed by (Kitchenham, 2004). This method can be covered in 3 main phases: Planning, conducting, and reporting the review. The planning stage entails formulating the inclusion/exclusion criteria, search strategy, and research questions. Researchers conduct a literature search, choose studies according to the criteria, and evaluate the quality of the included studies during the conducting phase. Ultimately, the results are compiled and organized in a systematic way during the reporting stage.

2.1. Data bases used

Based on the research questions, several term-based searches were carried out in an effort to find and exhaust potentially relevant publications. The Web of Science (WoS) and Scopus databases were searched for published articles on multicultural management using keywords such as "multicultural management" OR "cross-cultural teams" alone and in combinations. WoS and Scopus are considered the most respected and extensive databases for examining peer-reviewed literature, they were taken into consideration for the synthesis of the literature on multicultural management. Both databases are commonly recognized as the vastest sources of data for systematic literature reviews, serving as the main bibliographic databases (Zhu, Liu, 2020).

2.3. Inclusion and Exclusion Criteria

The following inclusion and exclusion criteria were used to download all papers with the keywords listed earlier:

- Only publications in the last 20 years (between 2003 & 2023) are included.
- Publications in English & French were included.
- Subject areas which are not related to Management, Business, & Engineering Multidisciplinary were excluded.
- Grey literature in the form of conference proceeding were included.

Based on the inclusion and exclusion criteria above, 288 publications were found. They were sorted to exclude duplicated papers since articles were downloaded from two databases. As a result, 50 duplicate publications were deleted. After reading the abstracts of the remaining 238, the list of articles was narrowed further by removing those which didn't have "multicultural management" or "multicultural teams", resulting in 163 articles to be synthesized and analyzed (Figure 1).

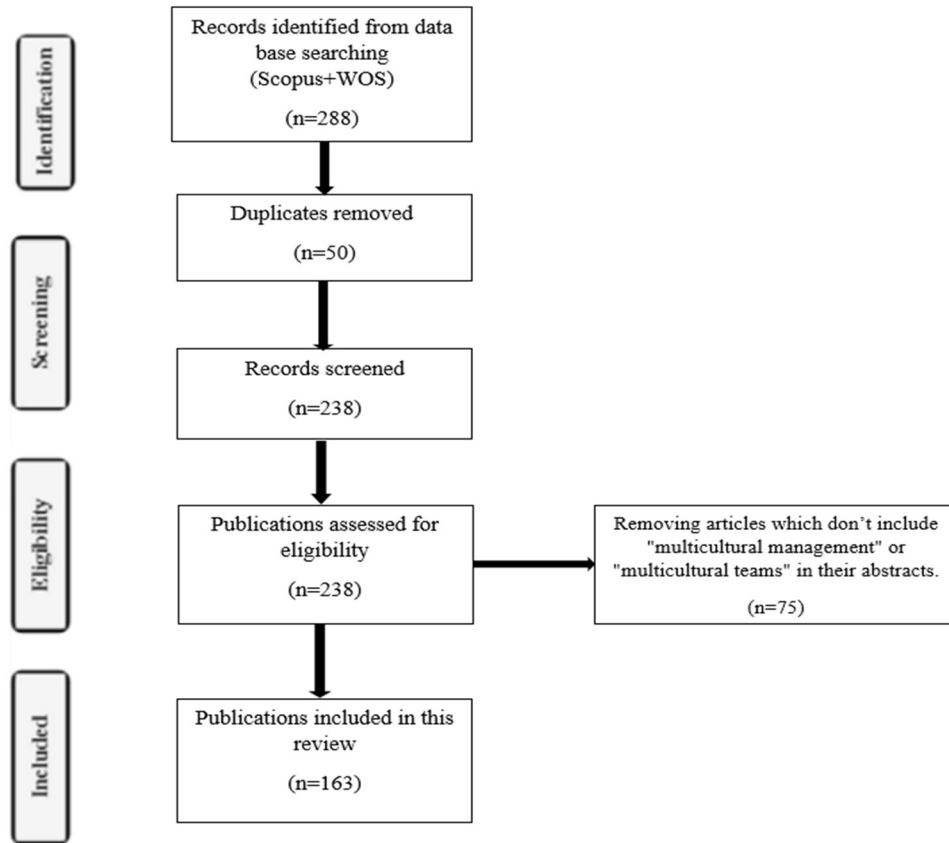


Figure 1. Criteria for selecting the articles for this review.

Source: Author's own contribution.

2.4. Data Synthesis and Analysis

The current review starts with a general overview of studies on multicultural management, including co-occurrence (co-word) analysis and a co-citation analysis, using the previously stated research questions as a guide. Consequently, research gaps became apparent and future research agendas were suggested.

2.4.1. Co-occurrence (co-word) Analysis

Examining associations between significant keywords reveals the relevance of researching the topic of multicultural management. The network of interactions between keywords is described using a co-occurrence (co-word) analysis. Researchers can use this analysis to examine the research path for a specific research theme based on keyword associations (Ding, Yang, 2020). The main keyword system analyzed 884 keywords, However, the analysis only included 68 significant keywords that “co-appeared” at least three times. Moreover, the VOSviewer analysis revealed five clusters (Figure 2). Cluster one (red nodes) is about project management, global projects and competences. Cluster two's (green nodes) main words are education, engineering multicultural teams and

competitive advantage. Cluster three (blue nodes) is ruled by communication, leadership and organizational culture. Cluster four (yellow nodes) covers the topics of technological development, virtual teams and cultural diversity. Lastly, cluster five (black nodes) covered cultural intelligence, global integration and engineers.

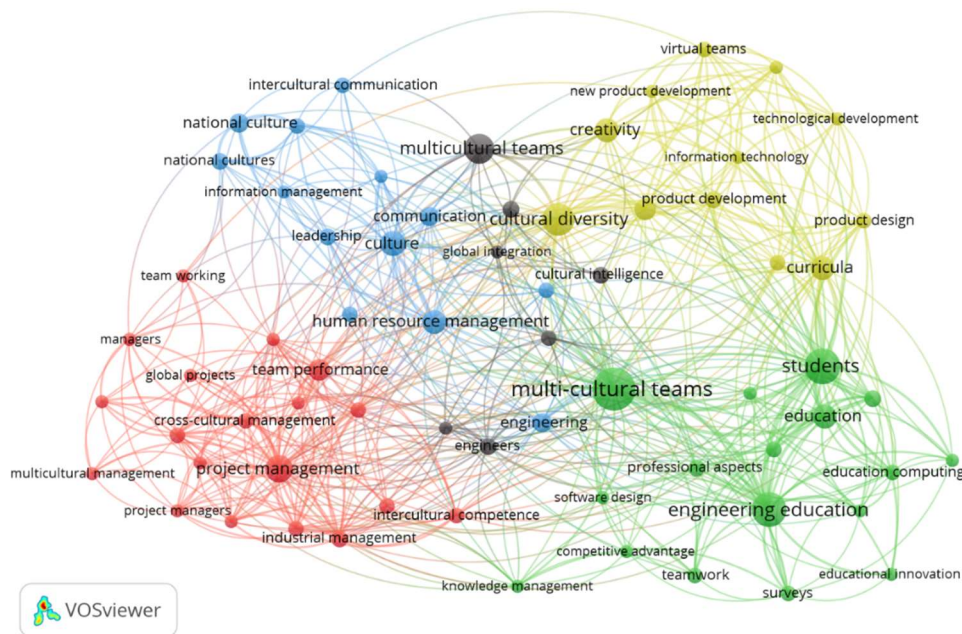


Figure 2. Co-occurrence analysis on VOSviewer

Source: Author's own contribution.

2.5. RESULTS

From the co-occurrence analysis, it can be concluded that the most researched areas when it comes to multicultural management are:

Cultural intelligence in project management:

The interaction of cultural intelligence and project management, particularly in the context of multicultural teams working on common projects (Kilduff, Cormican, 2022). To improve project manager competencies, organizations should develop cultural intelligence-focused training and leadership competency development. In this regard, cultural intelligence is crucial in project management because it enables team members to navigate and leverage cultural diversity for successful project outcomes (Bergh, Du Plessis, 2016).

Multicultural Management & Education:

Multicultural education is a continuous process of assisting students in achieving academic and personal success by providing equitable educational opportunities to all students (Biggs, Tang, 2011). By selecting and managing policies, curricula, and teaching styles, teachers, administrators, and school leaders play an important role in ensuring the incorporation of multicultural education which acknowledges and prepares students to

thrive in a diverse world by acquiring all the necessary skills in their education (Kelly, 2009).

Communication & leadership in multi-cultural teams:

Effective multicultural team management entails being forthcoming about cultural differences, accommodating them, and stepping in early to establish expectations or, if needed, bringing in more senior managers (Lisak, Erez, 2009). Through the implementation of these strategies, leaders can proficiently oversee multicultural teams and capitalize on the distinct strengths and viewpoints of every team member to accomplish their objectives. In conclusion, cultural intelligence, the capacity to promote teamwork, and knowledge of cultural variances are necessary for effective leadership and communication in multicultural teams. Through fostering an atmosphere that is both courteous and inclusive, leaders can leverage the diversity present in their teams to achieve success (Gudykunst, 2003).

Cultural diversity as a driver for technological & economic development:

Technological and economic development is propelled forward by cultural diversity, especially in large technology companies. These businesses are realizing the value of diversity and inclusion (D&I) more and more. Accepting & managing cultural diversity helps to increase workplace productivity, global market expansion, creativity, and customer understanding. Large technology companies that actively address diversity and inclusion are advancing both the wider technological and economic development as well as their own growth and success (Nathan, Lee, 2013).

Global integration & cultural diversity:

The relation between cultural diversity and global integration has broad implications. Societies are exposed to a wide variety of cultures, customs, and viewpoints as they grow more globally integrated. Through the exchange of concepts, norms, and behaviors, this exposure may contribute to the enrichment of societies. Furthermore, cultural diversity can promote creativity and innovation by making societies more resilient and adaptable to external challenges (Matei, 2020). Understanding and appreciating cultural diversity is essential for global integration within organizations. Businesses that operate in a globalized setting frequently employ a diverse workforce to serve clients from various cultural backgrounds. Accepting cultural diversity in the workplace can help businesses become more creative, make better decisions, and comprehend a wider range of consumer markets (Gurrey, 2016).

2.6. CONCLUSION

This systematic literature review took into account 163 publications from Wos & Scopus on the topics of multicultural management & cross-cultural teams in order to respond to the previously mentioned research questions. The publications were interesting but there is a clear lack of current case studies dealing with the topic especially the current 'new normal' era. By searching the terms "Multicultural Management" & "Case study" on Scopus, only 4 results turn up, all of them published before 2010. Case studies are crucial to management science because they offer a thorough analysis of real-world management problems and shed light on the difficulties and complexities that businesses and organizations face (Lapoule, Lamy, 2012). In order to address the research questions, the researcher reasoned that disseminating the results of a case study she completed on a large

pharmaceutical company would offer a deeper analysis and a more thorough grasp of the subject, building on the findings of the systematic literature review.

3. CASE STUDY ON A BIG PHARMA COMPANY

The company which was included as a case study to analyze the determinants of cultural diversity in terms of effectiveness of team management was Merck. It is large company represented worldwide. Over 69,000 people work for Merck across sixty-six countries. The company's mission is to use science and technology to solve some of the most challenging problems facing humanity today and to build more sustainable lifestyles. Helping to create, enhance, and prolong life; offering specialized treatment for severe disorders; and providing the scientific community with more powerful instruments, services, and digital platforms that facilitate more accurate and easier research and accelerate scientific advancements (Source: company website). The case study presented in the thesis was based on Merck's Polish subsidiary MBSE: Merck Business Solutions Europe situated in Wrocław.

The research process consisted out of three stages (Figure 3). The first stage was presented in section 2 (The study's objective was identification of influence of cultural diversity on effectiveness of management & performance of multicultural team. The researcher intended to investigate how the company's diverse staff is managed from an employee's perspective, as well as from the managers' perspective. Also, if policies and practices are followed. The research goal is to determine and identify the necessity of implementing a multicultural management style to increase effectiveness at corporations with a focus on MBSE as a case study.

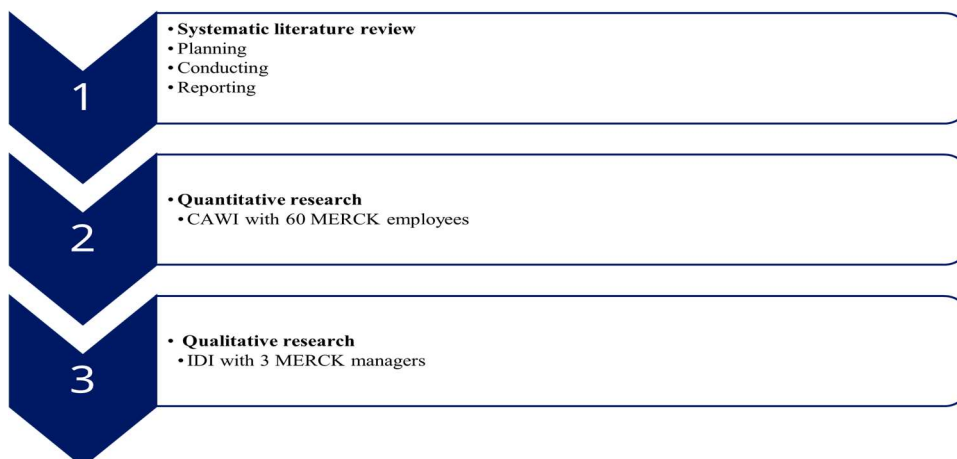


Figure 3. Research methodology

Source: Author's own contribution.

The main objective responses were gathered via a survey (quantitative data), and the subjective, more personalized data were gathered via interviews (qualitative data). Based on the research questions and hypotheses, survey and interview questions were developed.

The two approaches to data collection complement each other and improve the data's validity and reliability (Harris, Lois, Brown, Gavin, 2019).

3.1. Quantitative approach

Section 1: general information

60 employees from MBSE have responded to this survey. The below section contains all general information. Like all corporates, there are different functional services in the company, respondents work in HR service, finance service, IT, marketing, research and development, procurement, and management (Figure 4). Merck company has employees with different nationalities. Many of them are from Poland, obviously as this study took place in the Polish division of the company. Polish is the most present language in the company, the majority of respondent are female 53.3% and the rest 46.7% are male. The most dominant age ranges from 18–30 with 61.7% then came the rest of with less numbers which mean that MBSE company has young competence from difference countries which proves the diverse spirit in the company, the frequent period of experience within the company is from 1-5 years which makes sense as the Polish affiliate has only been operating since 2016.

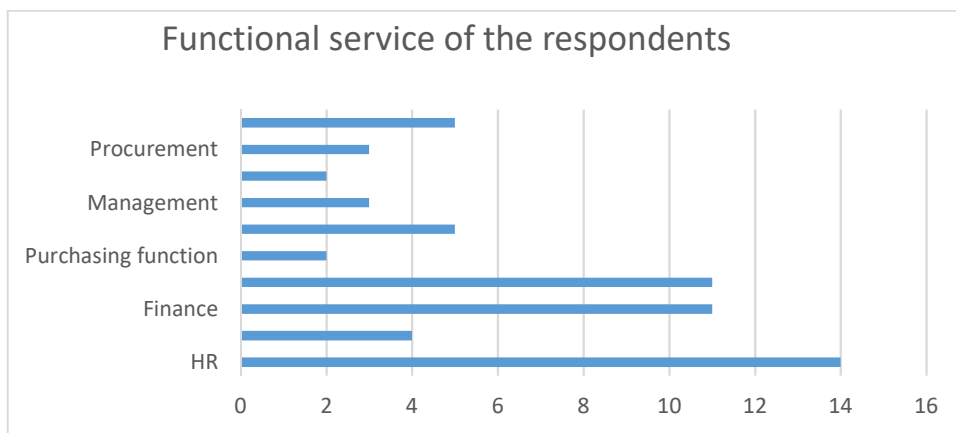


Figure 4. Functional service of the employees

Source: Author's own contribution.

The respondents' opinions about key aspects of working in multicultural team are presented in Table 1. The 5-level Likert's scale was used to measure the extent to which the respondent agrees with a given opinion. In each case, the number of respondents who selected a specific scale is shown in Table 1. 1 being I don't agree at all and 5 being I completely agree.

Based on the respondents' answers, some hypothesis can be formulated: the overall perception of Merck's approach to diversity management in general, and particularly to cultural diversity, is positive. Employees want and accept diversity, they believe that cultural heterogeneity, would benefit the overall organization when it comes to effectiveness, performance, and innovation. More precisely, an enhanced emphasis on multicultural management is thought to potentially boost Merck's available workforce in

the long run. Employees who took part in this survey, have embraced, and appreciated the strategies guiding the greater emphasis on diversity management.

Table 1. Opinions of respondents

Questions asked	1	2	3	4	5
1. Are you opened to other cultures & customs?	1	2	2	20	32
2. How big is the effect on cultural differences on you daily work?	-	6	14	22	18
3. Can in-workplace training help with cultural diversity?	-	-	10	18	32
4. To what extent your employer supports you in language/cultural skills?	-	2	16	23	19
5. Do you find challenges in attending meetings with multicultural teams?	13	21	12	11	3
6. How willing are you to learn how to orient yourself in your colleagues/manager's culture?	1	3	11	20	25
7. How do you rate the satisfaction level of working in a multicultural environment?	-	1	10	20	29
8. How frequently to you take part in company events about D&I?	1	8	17	15	19
9. What is the frequency of conflicts in your team that were caused due to cultural differences?	15	18	13	11	3
10. How would you rate the efficiency of your team?	-	-	9	30	21
11. Do you think that multicultural teams provide a competitive advantage to the company?	2	1	7	21	29
12. Is it rewarding to work with people with different cultural backgrounds from you?	-	-	16	14	30
13. Do you think that multicultural teams are more innovative than culturally homogeneous teams?	1	2	17	11	29
14. How essential is trust for the development of your team?	-	1	11	13	35
15. How important it is for the team to have shared vision of the company's goal & objectives?		1	6	15	38

Source: Author's own contribution.

3.2. Qualitative approach

Virtual & face-to-face interviews were used to gather the data for this study. All the interviews were conducted after previous discussion with the managers about the topic. The questions and the topic were included in the interview invitation as giving the questions beforehand will help provide more thoughtful responses. These will be structured individual interviews with each manager separately. The 3 managers have team members

from/located in: Poland, Germany, Philippines, Us, Italy, Spain, Morocco, Austria & France.

Manager 1:	Manager 2:	Manager 3:
<ul style="list-style-type: none"> • Ukrainian. • working in Merck since 2009. • Multicultural Management: 'Working in multicultural team brings a lot of advantages compared to the one-nation team such as: a lot of ideas are proposed while discussing and brainstorming for solution. Also, the conflicts are solved in many ways due to diversity, the level of inclusion is higher since people are more open to accept a very different person from the point of view of language, culture, habits and so on therefore no newcomer will be rejected'. • Effective management: 'The solutions to assure effective motivation of people in the team can be by establishing a teamwork spirit within the team by different initiatives. Motivation is stimulated as soon as posting funny stories in the group chat, someone brings breakfast to the office, team dinners and events outside the workplace. Motivation is often boosted by little things that don't relate to work. Appreciation is always a good motivation'. 	<ul style="list-style-type: none"> • German. • working for the company for 22 years. • Multicultural Management: 'The biggest advantage of a multicultural team is that you learn many new aspects (private and business). The team has a very different approach to the daily work and everyone in the team has an open mindset and their own methodology which can be an opportunity to learn from other team members'. • Effective management: 'Some nations tend to lead teamwork, while others tend to follow owing it to cultural reserve. A manager must create a safe environment in which everyone feels comfortable and at ease. People who are shy to speak up, for example, may require time to prepare for a meeting, and they may need to be called out to offer their views. Some solutions to assure effective decision-making in the team is to delegate as much as possible, empower, do not predict failure, and do not remind of previous mistakes, try to make fast fact-based decisions, let certain decisions be done by the team after their joint alignment'. 	<ul style="list-style-type: none"> • German. • Working for the company since 2013. • Multicultural Management: 'Problems that can be faced in a multicultural team or rather it wouldn't necessarily be a problem, is the hierarchy which can sometimes represent an issue. Example: manager from EMEA and Team lead from APAC. In many cases, the team lead does not have the courage to contradict his/her superior. The manager in EMEA, however, is very positive about an open discussion (with different opinions) and values it very much'. • Effective management • The feedback culture at Merck is very much in focus. Recently, I discussed it within a workshop and made everyone understand that the feedback culture is very much appreciated, talked about the different ways of giving feedback and, of course, the possibility for everyone to share their feedback constructively at any time even across teams where an established comfort zone is needed'.

Figure 5. IDI Interviews

Source: Author's own contribution.

The Figure 5 shows structured and grouped findings from the in-depth interviews with 3 Merck Managers. The interviewees were asked to describe their attitudes about cultural diversity in their teams/company and to rate the importance of various management strategies. Interviewees were also urged to contribute other strategies that have proven to be helpful in their experience to the list of already selected practices.

3.3. Results

This case considers the relationship between multicultural management and job performance in multinational organizations with a focus on the organization under study. The researcher organized a survey and interviews as part of the quantitative and qualitative research phases to answer the research questions. We can conclude that:

Elements which influence the performance of multicultural teams are clarity of communication, employee engagement, conflict resolution, technology use, organizational culture, resource allocation, inclusive decision making and psychological safety.

The determinants of effectiveness in multicultural work teams are cultural awareness/intelligence, inclusive leadership, effective communication, clear objectives, feedback, recognition, flexibility & adaptability.

Several factors can improve innovation in multicultural teams such as Leveraging diverse perspectives, addressing cultural barriers, cross-cultural training, delegation and rewards.

4. DISCUSSION

Multicultural management is often an interdisciplinary field that aims to facilitate communication, management, and interaction between different cultures within companies, especially those developing internationally, and employees and actors from different cultures. The context of globalization, characterized by the intensity of world

trade, the mobility of people and goods and the increase in international partnerships and agreements, requires a new HR management capable of creating strong and lasting social bonds by promoting a way of working that favors the diversity of profiles within organizations. Multicultural management, when mastered and relevant, allows companies to make the most of new talent, regardless of its origin, to increase their competitiveness and ensure long-term development (Shan, Konishi, Pullin, lupina-Wegener, 2021).

In this case, it is important to help managers decipher the symbols and rituals of the cultures involved. This is neither superficial nor a waste of time, on the contrary, it gives managers the key to understanding, many tense situations can be avoided through the cultural approach. The application of this type of management facilitates exchanges between employees and allows the company to shine in times of values and corporate culture (Tandé, 2017). A management technique that aims to improve and optimize relations between people from different cultures within the same company allows, among other things, to minimize incidents between employees. One of the biggest changes today is to develop the company in the context of globalization by managing the complexity of organizations and cultural diversity (Suedekum, Wolf, Blien, 2014). Cultural diversity is a central element of management. It is very difficult for companies to deal with this reality. Therefore, it is important to understand its benefits and challenges (Lin, 2020).

Uncertainties about the management's function in multicultural teams and discrepancies in the accepted manager were discovered to be another source of troublesome circumstances. Manager must take steps to ensure that the information is not interpreted incorrectly. Cultural awareness training, communication improvement activities, trust building activities, shared vision of goals and objectives practices, creation of clear roles and responsibilities: introductory lecture, task visibility and cultural awareness are all disciplines which must be embraced and reinforced by managers (Barak, 2022). It can also be seen that highly productive and low-productive teams differ in how they manage diversity, not in the presence or absence of diversity, as is often assumed. When diversity is managed, it becomes a productive resource for the team. When ignored, diversity leads to operational difficulties that reduce the team's effectiveness (Loue, 2022).

It is obvious that more case studies must be done to compare the findings in order to come up with best practices to be implemented such as:

- Including courses about multicultural management/ cultural intelligence in curricula at universities.
- Investing in employees by holding training courses that explain the relationship between multicultural management and high performance of human resources and work systems.
- Creating an organizational climate that recognizes the importance of managing cultural diversity and high inclusion that bring about change in work systems with normal performance.

The research to date has successfully captured the importance of multicultural management. But, with the current changing market trends and circumstances, new and up-to-date studies are more needed than ever to truly dive and understand this topic on a deeper level especially that in the 'new normal' era, most of these multicultural teams are also working virtually which adds another layer of complexity to the subject:

The researcher suggests organizing future studies including topics such as:

- The impact of external factors on the behavior and performance of employees in a multinational organization.

- The effectiveness and performance of virtual multicultural teams.
- The current challenges in multicultural virtual teams.

5. CONCLUSION

Companies are discovering that the available workforce is not as homogeneous as it once was, owing to a large influx of professional migrants internationally. As a result, businesses are increasingly concerned about their management style in order to adjust to the current workforce. The research undertaken in the article aims to determine, measure, and identify how implementing a multicultural management style can help improve effectiveness, performance and innovation culturally diverse teams. A case study based on a big pharma company took place since the researcher had direct access to employees and managers.

Through the quantitative research, it was concluded that employees at MBSE value diversity, they are open to their colleagues with different cultures. They believe that implementing more innovative, diverse management techniques is not only beneficial but rather a necessity to the company. Through the qualitative approach, it was discovered that managers highlight the importance of multicultural teams and the competitive advantage they offer to the company importance especially that in a big multinational corporation, effectiveness of the team is connected directly to the management style used. When having team members based/from in different countries, the manager has more responsibility to adapt his/her managing strategy to optimize performance and innovation of the team.

Some gaps in the literature were identified, such as lack of empirical studies about the topic. Also, the dynamic nature of cultures and how they evolve over time, requiring research that considers ongoing cultural shifts and their implications for management practices. In addition to that, with the rise of remote work, there is a need for research examining how multicultural management principles apply in virtual teams and whether traditional models are still relevant in this context.

In summary, multicultural management has the potential to completely transform the workplace by providing the organization with previously unheard-of levels of appeal and flexibility. But improperly managing a multicultural team in an attempt to capitalize on cultural diversity can do more harm than good. While this paper has attempted systematically comprehend what is currently known about this topic, more empirical research is required to advance it.

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DISAPPROVED GROUP BEHAVIORS WITHIN THE POLICE FORCE

The Police Force, as a social institution, is not immune to various types of socially unacceptable behavior. Such behavior includes social pathology, defined as negative social behaviors that violate a system of norms and values and have a destructive impact on society on a larger scale. This study analyzed selected dysfunctional behavior and group socio-pathological phenomena existing in the police environment, which breaks down group ties and harms society at large. The study discusses such issues as extreme behavior in a professional situation, lack of readiness to oppose illegal influence, and mobbing.

Keywords: Police, dysfunctional behavior, socio-pathological phenomena, extreme behavior in professional situations, lack of readiness to oppose illegal influence, mobbing.

1. INTRODUCTION TO THE SUBJECT MATTER

The scientific circles have been discussing the issues related to socially disapproved behavior for many years. What is characteristic of this discussion, is the fact that quite a large group of terms and concepts functions in science, which shows negative social 'potential' that is understood differently by various representatives of this research trend. Theoreticians wonder what social problems, social pathology, social deviation, social disorganization, social labeling, social anomia, social trauma, social issue, social uncertainty, social marginalization, social dilemmas, social traps etc. actually are (Moczuk, Bajda, 2016). This, however, does not define the scope of the subject discussed, because in addition to the issues mentioned, such terms are used in science as: demoralization, which exists on the grounds of law, dysfunctional behavior, social maladjustment, social inadaptation, social derailment, educational difficulties that are characteristic for the science of pedagogy, as well as risky behavior, antisocial behavior, behavioral disorders, emotional disorders, deviant behavior, moral neglect, problematic behavior, social and moral dilemmas, unconventional behavior, asocial behavior, dysfunctions, all of which are discussed in psychology and psychiatry. Nevertheless, the aforementioned catalog of concepts and terms cannot be considered finite. Deriving inspiration from the achievements of Jerzy Kwaśniewski, it can be stated that pathology, deviation, social problems, dysfunctional phenomena, social disorganization essentially are synonyms used to identify

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forms of social 'evil' or social 'ailments' (Kwaśniewski, 1991), whereas the subject matter itself, due to its analytical and research diversity, should be discussed with due scientific diligence, in such a way as not to abuse it when it is not advisable.

When 'exploring' the issue, one may get the impression that many of the concepts characterizing disapproved social behavior are used interchangeably, where the phenomena referred to as 'social pathology' are treated as topos (Illusie, 2004)², as the key to the understanding of certain social phenomena disturbing a given society. These terms get mixed, while the lack of a theoretical basis for their analysis, leads to the fact that something that is considered a pathological phenomenon can be defined by another concept (Moczuk, Bajda, 2016).

Due to the fact that this study presents selected dysfunctional and pathological phenomena occurring in the police, only the following two issues ought to be briefly characterized: 'dysfunctional phenomena' and 'social pathology'.

In regard to the concept of 'dysfunctional phenomena', it should be noted that it was introduced by Robert K. Merton, who, based on functional theory, discussed the issues of social anomie as well as other social issues with a 'negative' coloration (Merton, 2002)³. He had written at the time that

not all such deviation from the dominant norms of the group in necessarily dysfunctional for the basic values and adaptation of the group. (...) Strict and unquestioned adherence to all prevailing norms would be functional only in a group that never was: a group that is completely static and unchanging in a social and cultural environment, which is static and unchanging (Merton, 1968).

Dysfunction, thus, is a set of phenomena negatively affecting social-system changes, its modification or adaptation. Dysfunction causes tension in the system, which leads to deformation and loss of internal functional balance. Each system is, to some extent, characterized by dysfunction, while its dynamics and development derive from the abrasion of its dysfunction and function. Dysfunction is the society members' lack of ability or insufficient ability to adapt, which in consequence leads to the society's stagnation and ossification. Although the social system is functioning, it gradually loses its developmental power. Social system dysfunctions are similar to disease, which unrecognized and untreated in time, eventually lead to permanent degeneration (Bober, Hausner, Izdebski, Lachiewicz, Mazur, Nelicki, Nowotarski, Puzyna, Surówka, Zachariasz, Zawicki, 2013). Dysfunction is a system malfunction, caused by negative social phenomena, leading to the system's negative functioning. The social system, therefore, is forced to take action to restore the previous state, as to maintain balance, or accept the given state, through adaptation, which then becomes a norm in the society. Dysfunction thus is a phenomenon that adversely affects a given social system, while its long-term impact can lead to a pathological condition (Pasieczny, Glinka, 2016). Dysfunctional behavior is such behavior that violates the universally accepted norms, values, principles and rules, whereby it must be intentional, i.e. conscious, purposeful, not random and not-culpable, as well as repetitive, i.e. occurring more than once (Szostek,

² A topos is a recurring motif, theme or stereotypical imagery regarding a particular social phenomenon. This concept derives from both literary studies as well as mathematics and philosophy.

³ The term was introduced by Robert K. Merton.

2015). Dysfunctional behavior is a behavior of intentional nature, which not only violates the commonly accepted norms, values, principles and rules, but the consequences of which have an interpersonal dimension and encompass Machiavellian behavior, including bullying, mobbing, psychopathic leadership, sexual harassment, desocialization, as well as formal behavior consisting in the building of agreements or relationships that are aimed at particular interest, as opposed to the social well-being and the organizational dimension, and encompassing such anti-organizational behavior as activity that detrimental to the social system as well as asocial forms of involvement, including corruption or addiction (Szostek, 2015).

The concept of 'social pathology' was introduced into Polish scientific literature by Adam Podgórecki, who stated that "it is a type of behavior or functioning of a social system, which remains in incompatible contradiction with the ideological values accepted in a given community", thus recognizing the fact that ideological values are just a generalization of various subjective assessments, hence social pathology is dependent on the time-variable subjective views functioning in a given community (Podgórecki, 1976). Irena Pospiszyl is of an opinion that social pathology is defined as a negative social phenomenon that factors in the following: a) violation of norms and values; b) the destructiveness of a given behavior, measured by the scale of social condemnation; c) its occurrence in a larger community or on a mass scale; d) the need to use collective power to counter such problems (Pospiszyl, 2008). Making use of the research achievements of Izabela Wiciak and Magdalena Baranowska, it can be indicated that when classifying the forms of social pathology, several criteria should be taken into account by which these forms can be categorized, including: a) the criterion of their reference to humans; b) the criterion of norm exceedance; c) the degree of social harmfulness and incompatibility with the generally accepted primary social values (Wiciak, Baranowska, 2009).

To sum up this short, out of necessity, argument, it should be noted that the terms 'dysfunctional phenomena' and 'social pathology', although not explicit in their meaning, have rather negative reference, despite the fact that the term 'dysfunction' is more neutral, while the term 'pathology' is a strongly negative. The two terms additionally refer to axiological issues. In the further part of the study, therefore, an analytical basis will be adopted that assumes existence of social pathology phenomena in conjunction with dysfunctional phenomena. This also applies to 'group' phenomena, the essence of which entails a breakup of group ties and supra-individual harmfulness, as well as the fact that they differ in their 'nature' from dysfunctional and pathological phenomena of an individual character.

The subject of this study is a preliminary analysis of selected dysfunctional phenomena and social pathology present within the police environment, characterized as "group phenomena", conducted using the Scoping Review method. It includes an examination of behaviors such as extreme conduct by police officers in professional situations and a lack of readiness to oppose illegal influences, reflecting issues within the police institution. Additionally, it addresses bullying (mobbing) not only occurring within the police force but also present in institutions external to the police. These topics are presented to enable those studying social pathology within police forces to conduct a more precise analysis, thereby enhancing knowledge in this area within contemporary science.

2. DYSFUNCTIONAL AND PATHOLOGICAL 'GROUP' BEHAVIOR IN THE POLICE. ANALYSIS OF THE ISSUE

In reference to 'group' phenomena, extreme behavior in professional situations, lack of readiness to oppose illegal influences and mobbing have been analyzed.

The first involves the issue of extreme behavior in a work situation. It can be assumed that police officers risk being directly exposed to the loss of health or life during their worktime, although they put themselves at risk not out of the need to seek extreme and pleasant sensations, but due to the work they do. Situations occur when police officers have to chase a non-stopping vehicle on a motorcycle, at maximum speed, when they have to defuse a bomb that can explode at any time, or when they are face to face with ruthless criminals. Extreme behavior in the work of police officers is characterized by certain specificity that distinguishes it from the behavior of other people. There is direct risk of a loss of life or health, and this behavior is of continuous character. This risk is not incidental; it persists over a long time. Any failure when taking action cannot be rectified, while mistakes usually end tragically. One important element of extreme behavior is the high level of stress, while the emotions experienced at the same time and the lack of personal security determine the essence of extreme behavior (Pruchniak, 2007).

The police profession is a profession characterized by high levels of stress. Based on studies conducted in Poland, which included a group of 2.5 thousand representatives of 47 different professions, it results that the highest level of stress has been recorded in the police profession. The traumatic stressors which police officers come into contact with are divided into two groups: a) violence-related and strong-anxiety-causing events, which a police officer may be a participant of, including events related to the use of firearms, confrontation with an aggressive crowd, which can lead to injury or death, being held hostage or being a victim of violence; b) depressing events during which a police officer encounters situations that cause severe depression, including witnessing death, seeing mutilated bodies or corpses, witnessing disasters and criminal acts, where children or other persons police officer identify with are the victims or where another police officer is the victim. Such stress intensifies when difficult interaction between the Police and the public occurs (unrealistic expectations and claims on the part of the citizens, relative to the Police), when official actions bear a high degree of risk, for which no patterns of action have been developed (unpredictable actions, pursuit of criminals), when the work organization is not appropriate (shift schedule, night work) (Jarczak, Noga, Małodobry, 2018).

As Lucyna Stanek notes,

the specificity of the police service entails the need of constant readiness and availability to perform specific tasks. These tasks include, inter alia: intervening in various situations, chasing criminals, dispersing crowds, the use of direct coercion measures, conversations with mentally ill persons or with persons experiencing violence at the hands of close family members (Stanek, 2013).

She further states that

work in the Police involves performance of professional duties and tasks in difficult, dangerous and often extreme situations. A police officer encounters aggression, violence and human misfortune during his/her service. Often, he/she must inform families about the death of the loved ones. In addition, he/she encounters situations where his/her health and life is directly or indirectly

jeopardized. This is because his/her work is full of shocking and unpleasant events, and thus he/she experiences severe stress (Stanek, 2013).

Ulrich Beck, while developing the concept of 'risk society', assumed that in postmodern societies, risk is inscribed in social behavior (Beck, 2004). Risky behavior nowadays constitutes part of people's behavior. Nowadays, people, from very young age, become convinced that there is no 'fun' without risk. Bungee jumping replaced skydiving, snowboarding replaced skiing, motorcycle riding at extremely high speeds replaced racing, driving under the influence of alcohol has replaced fun, while psychologists are unable to answer the questions of why people behave like this (Trimpop, 1994). As such, when referring to police officers, two basic dimensions of extreme behavior can be mentioned: a) undertaking extreme risks associated with the possibility of direct loss of life, engagement in matters that may be frightening to others, personal experience in functioning under conditions of immediate threat to life, as well as the existence of situations where an error can lead to death; b) the sense of security in extreme risk situations, which is associated with individual, personal sense of security in a risky situation, belief in the possibility of controlling risk, lack of experience with negative emotions (Pruchniak, 2007).

Police officers, nevertheless, are aware of the various threats, although they still have to face them. This is due to the fact that the objectives they pursue within the given institution do not have a time frame, because crimes are not committed at regular intervals and cannot be predicted. What is more, a certain attitude to death or health damage exists, which should not interfere with the decision-making regarding the use of weapons and direct coercion or other activity. In many cases, officers must control their own emotions in order to perform their duties well. Extreme behavior, therefore, entails deliberate actions, extended over time, which may result in loss of health or life, although the factors that play an important role in this respect are those that influence acceptance of risk, including personality traits, coping strategies, life orientation, and the need to 'prove oneself' (Pruchniak, 2007). The 'costs' of such extreme behavior, however, can be high, possibly resulting in stress and occupational burnout.

Joanna Jarczak, Henryk Noga and Zbigniew Małodobry distinguish three types of stress in a professional situation: acute, chronic and traumatic stress. Acute stress entails an acute reaction of the body to a threat of physical, mental or economic nature, which violently disturbs one's mental balance, appears suddenly and lasts for a relatively short time, but requires intensive mobilization of the body. Chronic stress results from prolonged exposure to stressors, when constant mental tension occurs, which is accompanied by the body's limited capacity and reduced ability to regenerate. Traumatic stress is the body's response to a life-threatening situation, when shock, disbelief, strong emotional reactions occur, resulting in strong excitation as well as inattention, memory and sleep disturbances, difficulties with controlling emotions, which in turn cause problems in the implementation of everyday professional and non-professional duties (Jarczak, Noga, Małodobry, 2018). Lucyna Stanek adds that due to the contact with violence, aggression, death, and many shocking events during everyday service, police officers are exposed to neurosis and depression as well as are prone to various forms of addiction and autoaggression. It is one of the most dangerous and stressful professions in the world. Stressors appear, which consist of three stages: an alarm reaction, a stage of defense (immunity) and a stage of resignation (exhaustion). Stress, which is the body's defense mechanism, with long-term impact on the individual, may imply appearance of neurotic processes, aggression, as well

as other negative behaviors, leading to a decrease in one's resistance to stress, within both the psychological and the physiological spheres. This may cause a lack of a sense of balance and security, which results in disruptions of proper relations with colleagues and superiors, conflict situations arising from the line of authority, the setting of too high expectations, lack of self-fulfillment, mobbing and harassment, the sense of unfulfillment and injustice (Stanek, 2013). The impact of the stressors in the police work gets transferred onto family life, whereas the police officers experiencing stress have bad relations with family members. What is more, the impact of the stressors in the police work, combined with individual human conditions, can lead to uncontrolled outbursts of anger, a tendency to abuse alcohol or the use of physical violence (Jarczak, Noga, Małodobry, 2018).

The thesis that some police officers exploit their social position via inadequate use of force against others cannot be rejected either. Bogusław Jaremczak indicates that in 2017 a report titled "The study on the occurrence of aggression among police officers against persons outside the Police, whom the police officers have contact with in connection with the performance of official duties" was published, which shows that about 50% of the police officers surveyed encountered, during their service, unjustified aggression of colleagues towards ordinary citizens, while about 64% of the officers supported interventions with the use of 'all available methods'. Moreover, about 45% of the surveyed officers witnessed incidents of police officers' excessive aggression against others, while about 8% were guilty of such behavior themselves. Some respondents also admitted that they occasionally behave more aggressively than necessary, while nearly a third of the respondents accept the use of direct coercion measures, even when there are no grounds for the use thereof (Jaremczak, 2018). The disproportionate use of force by police officers has been mentioned on the occasion of the American 'War on Drugs Policing', when the officers' actions towards the persons selling illegal psychoactive substances caused increased police brutality, inadequate to the needs (Cooper, 2015).

Another phenomenon has been mentioned by Elizabeth E. Joh while describing undercover police operations that are carried out outright on the fringes of the law, including placement of undercover officers within the structures of drug cartels, or introducing them to organized crime, opening of illegal companies that deal with 'money laundering', production and street distribution of illegal psychoactive substances or drug dealing in selected places, including prisons, as well as administrative corruption, organization of illegal races or animal fights, and many other illegal activities, even though they are justified from the perspective of the social interest associated with legitimization of undercover officers in the eyes of criminal groups (Joh, 2009). It should be added that the social knowledge about such activities carried out by Polish law enforcement authorities is not very extensive, which is beneficial for the maintenance of the secrecy of such special operations.

Another issue analyzed is the lack of readiness to oppose illegal influence. As Zbigniew Morawski states, the Police is a social institution and a formal organization working for the benefit of the society (Morawski, 1999). This formal organization is characterized by the following elements: a) the social bond, which is professional and functional in nature, conditioned by the common interests officially defined in the statutes and regulations; b) the goals-values that are imposed by the organization as those to be achieved by it or as those for the implementation of which the organization has been established by external instances; c) the organization's coherence, of an administrative and service nature; d) leadership, which is established or imposed in an administrative mode and bound by the hierarchical structure of power and responsibility; e) a type of coordination (management),

i.e. organizational charts establishing the system of dependencies, in terms of power, responsibility, activities as well as the manner of communication; f) the positions and roles constituting the rigid, hierarchical system of superiority, parity and subordination, defined by the organizational charts, where these positions and roles are assigned behavioral patterns that are expected and required by the organization when implementing the objectives; g) division of tasks, developed in detail and imposed; h) the methods of communication, which officially use 'top down' and 'bottom up' information channels, as part of the specific chain of command, and comply with official procedures; i) the norms that have been legalized in the form of codes, statutes, regulations and thus have been impersonally enforced; j) the sanctions and penalties of a formal and legal nature, which are codified as an integral component of the applicable norms (Haber, 2000).

The formal organizational structure on the one hand obliges police officers' availability to the institution and compels them to legalism on the other. Availability is associated with the compliance with official discipline, the implementation of superiors' instructions and orders, as well as with the loyalty to the constitutional organs of the state. The principle of legalism, in turn, requires compliance with the law. This means that a police officer has the duty and the right to refuse to carry out an instruction or order, if it is related to the commitment of crime (Morawski, 1999). There are situations, however, when illegal orders are consented to, which is related to the mechanisms of symbolic violence. Symbolic violence is a form of violence that affects social entities, with their participation, and consists in obtaining, via various ways, of such influence on others, as to impose certain patterns of behavior, thinking and reality perception (Bourdieu, 2005). It is also impossible to resist the influence of a total institution, because a total institution that is a social organization, creates, for the people associated with it, a kind of a separate world, governed by its own laws and separated from the rest of the society by more or less tight barriers. The barriers that a total institution uses to separate itself from the world do not have to be physical (e.g. walls or barbed wires) but can be of a psychological and moral nature. Most total institutions, apart from applying a set of bans and regulations that strictly define every aspect of life, separate the people associated with them through the use of uniforms, a common culture or strong financial relations. According to Erving Goffman, total institutions are characterized by such features as: a) the fact that all daily activities are performed at the same place, under the same superiors; b) the fact that at any moment of performing duties, a person (an officer) is not alone and everything happens with inseparable company of the other people within a given institution, whereby each person is treated equally and the same is required of him/her; c) the fact that daily activities are always strictly designated in such a way as to inevitably lead to a pre-assumed activity that is imposed by a system of explicit, formal rules and carried out under professional supervision of management; d) such mandatory activity ultimately form a single rational plan, aimed to achieve the institution's official goals (Goffman, 2011).

One important element of the readiness to oppose the illegal influence in these institutions is the fact that despite the existence of various forms of supervision, control, discipline and oppression, which individuals are subject to in their relations with the total institution, a factor of individuality, autonomy, and self-determination appears, which may condition emergence of a belief that the institution has no 'overpowering' influence on the individual and may determine the ability to resist this influence. The emergent disagreement with specific behavior is then treated as a sort of Merton's 'rebellion', the essence of which entails the desire to change reality (Pasikowski, 2007). A police officer may, therefore, refuse to carry out an instruction or an order that can be connected with

crime, nevertheless, he/she must take into account the consequences of his/her act. Article 58, paragraphs 2 and 3 of the Police Act of 6 April 1990 (The Police Act of 6 April 1990) provides that a police officer is obliged to refuse to execute his/her superior's instruction or order as well as refuse to execute an order imposed by a prosecutor, a state administration authority or a local government, if execution of the instruction or order would involve commitment of crime, where as the refusal to execute an instruction or an order should be reported the Chief of Police, bypassing the official chain of command (Gacek, 2018). This means that there is no optionality here, but only obligatoriness, and therefore there is no choice, but to refuse, because he/she would be exposed to criminal, penal-fiscal and other penalties. Based on the Police Act, an order (Kural, 2017; van Voorden, 2014)⁴ is a command to perform a specific action or omission, issued to a police officer by a superior or an authorized senior police officer, in accordance with the wording of Article 141a of the Police Act.

Monika Dzimińska-Mosio notes that the issue of an officer's liability for refusal to execute an instruction or an order is associated with violation of official discipline. Nonetheless, the professional police ethics, included in the attachment to Ordinance No. 805 of the Police Commander-in-Chief, issued on December 31, 2003, should apply here (Ordinance No. 805, 2003). When a police officer on duty behaves in accordance with the rules, i.e. he/she performs his/her duties with the best will and knowledge, with due honesty and integrity, showing responsibility, courage and self-sacrifice in all his/her activities, respects human dignity as well as observes and protects human rights, takes special care when making a decision regarding the use of firearms or the use of direct coercion measures, taking the nature of these measures into account, as well as earnestly executes superiors' orders, does not accept and does not tolerate nor disregards the behavior of police officers who violate the law or the principles of professional ethics (Dzimińska-Mosio, 2012), no sanctions should be applied. Marcin Fiedukowicz states that "development of a deontological framework for the representatives of this profession expresses the efforts undertaken to emphasize the most important ethical principles in the daily service of a police officer" (Fiedukowicz, 2014). Thus, it may happen that police officers will show a lack of readiness to oppose illegal influence, which in turn may constitute a basis for criminal charges.

In the police environment mobbing functions on the verge of group and institutional pathology. The term 'mobbing' derives from the English verb 'to mob', which means to surround, attack, assault, tease. The word has been taken from the Latin word *mobile vulgus* (the fickle crowd). This phenomenon was discovered in the 1960s, in small children functioning in peer groups, and while studying this problem in children, a specific form of expression was encountered, which took various forms of manifestation, from physical violence to malice and serious threats (Davenport, Schwartz, Elliot, 1999, p. 34). According to Marie F. Hirigoyen, mobbing entails any type of abuse that is manifested in the form of behavior, words, personal attacks, gestures, or formal letters, which may compromise the physical or mental integrity of a person, threatening his/her employment or affecting the general atmosphere at work (Hirigoyen, 2012).

Mobbing is treated as a form of workplace violence, involving repeated, prolonged, i.e. lasting at least 6 months, negative and hostile impact of one employee or a group of

⁴ The concept of an order has been addressed by Michał Kural, who pointed out to the differences in its understanding with regard to the legal doctrine and in relation to the army, the Police and other state organs.

employees on another employee or a group of employees. This impact consists in unethical communication, harassment, intimidation, insulting, humiliation, social and professional isolation of the person or the persons subjected to it. Such behaviors can pertain to the professional, private, personal and sexual sphere of the person subjected to them. Mobbing can take a direct or an indirect form, beginning with subtle indirect forms, which can evolve into serious direct attacks. As a result of such interaction, the person/s subjected to it are in a situation of helplessness, which results from their weaker position in relation to the aggressor or the aggressors. These interactions may result in psychosomatic disorganization as well as in losses within the professional or the personal sphere (Miedzik, 2014).

In addition to the concept of mobbing, other terms can be encountered, such as: workplace aggression, emotional abuse at work, workplace/work harassment, aggression psychological aggression, scapegoating, petty tyranny, social undermining, unacceptable behavior, employee abuse, mistreatment, hostile behavior, moral harassment (Miedzik, 2014). Data analysis shows that, in Poland, the scale of mobbing is at the level of 17–19%. Most commonly, mobbing is experienced by public-sector employees (63.0%), compared to the private sector (36.7%), whereas in the public sector, it most often concern office employees (54.6%), healthcare employees (13.4%), the Police (11.8%), the Army (10.1%), as well as employees in the education and higher education sector (10.1%) (Miedzik, 2014).

It should be added that mobbing is considered to be one of the most important contemporary social problems in the workplace, because it is associated with both the quality of the work performed and the mental health of employees. It is one of the main workplace stressors, the negative consequences of which lead to anxiety, depressive disorders, behavioral problems, psychosomatic conditions, which also affect the mobbed person's family as well as his/her functioning, while its long-lasting duration leads to the occupational burnout syndrome (Radosevic, Britvic, Tod, 2018).

Mobbing can occur anywhere, where employee groups work and spend time in close proximity over a long time, including police formations. In a hierarchical formation, such as the Police, where the concept of an official instruction and order exists, while performance of tasks consists of timeliness, accuracy and diligence, which are regulated by law, specified in the employee's scope of activities and modified by the supervisors, it is 'not difficult' to observe mobbing. Mobbing, thus, does not entail the disciplining of a subordinate by a supervisor, in relation to his/her work. If an order does not violate a given police officer's dignity, is concordant with his/her qualifications and the scope of his/her duties, while the nature of the employment relationship indicates that the employee should perform a given task, then there is no mobbing. Mobbing entails a situation when the mobber uses insults, threats, violence as well as compromises such goods as health, freedom, dignity, honor, and basic labor rights (Frackowiak, 2013).

Nevertheless, the Police is a particular institution, since it is its responsibility to ensure that all people are treated tactfully and with respect, protecting human rights. In no way can any violence or discrimination phenomena occur in the police environment, while tolerance as well as sensitivity to the harm caused to others should constitute part of its functioning, because such attitudes increase the trust in the institution and allow its better contact with all citizens (Denney, 2019). As such, when an institution whose activity derives from international conventions, the national law, as well as from the principles of professional police ethics, uses itself various forms of mobbing within its ranks, with due reference to human rights at the same time, a cognitive dissonance emerges all the more so because Article 2 paragraph 2 of the 1950 European Convention of Human Rights ensures

the protection of any person against unlawful violence (The 1950 European Convention of Human Rights). It seems then that such behavior should not only be condemned institutionally, but should also be treated as a behavior 'dishonoring the police uniform', while the person acting in such manner should not only be punished, but also removed from the police ranks on grounds of shameful and undignified acts.

Mobbing, therefore, entails behavior that goes beyond the scope specified by regulations and may be related to the following situations: a) excessive control of employees, which limits their freedom of decision making and 'suppresses' their initiatives; b) exertion of psychological pressure; c) depreciation of work performance and merits; d) isolation, e) being left out in terms of awards, promotions, bonuses; f) unjustified criticism; g) neglect, threats and intimidation; h) humiliation, mortification; and) physical violence (Frąckowiak, 2013).

'Strong' examples of mobbing in the Police are difficult to be found in the literature on the subject, even though the Police, as a highly masculinized institution, seems to be somewhat predestined to it. The research conducted by Grzegorz Sanecki in 2013 on a population of 130 police officers in the Lublin Province showed that the phenomenon of mobbing does not exceed the magnitudes characteristic of other occupational groups and is of individual, rather than institutional, significance. It is also noteworthy that these studies entailed a diagnostic survey rather than an actual in-depth research that leads to unambiguous conclusions. The actual magnitude and manifestations of mobbing in the work environment of police officers is an issue still open, but it should be noted that fact that the victims of harassment, discrimination and other forms of persecution are not inclined to admit it, whereas the reason for hiding this fact lies in the fear of escalation, the willingness to continue working, as well as the embarrassment usually associated with such situations (Sanecki, 2016). The in-depth research conducted among 209 police officers from the Split-Dalmatia county in Croatia, published by Željko Radosevic, Dolores Britvic and Boris Tod from Croatia, incorporated the NAQ (Negative Acts Questionnaire for measuring mobbing at work) (Warszewska-Makuch, 2007) method to investigate the scale of violence in the police environment and showed that the daily, monthly or weekly incidence of harassment concerned one woman (2.1%) and seven men (4.3%). In general, the self-assessment method used to evaluate mobbing, indicates existence of this phenomenon at the level of 4.6%, where this scale is much lower than in the case of behavioral tests, which usually yield much higher results. Nevertheless, the results of the research should be addressed with caution, since they encompassed a relatively small sample, plus it was the first time this method was used to examine this phenomenon (Radosevic, Britvic, Tod, 2018). Another study on mobbing, conducted by Dick Gavin via a postal survey carried out on a population of about 720 British police officers from Kent, indicated that some negative work-related behavior is basically common among police officers, although only some of them experience it on a lot more intense level. Research shows that mobbing is discrete and indirect rather than direct. Importantly, the lack of control over negative behavior in the workplace is not only of individual nature, which causes individuals to 'feel bad' in the work environment, but also of an organizational nature, e.g. when well-trained and experienced employees leave a given institution. The management's attitude towards mobbing is also important. In places where such phenomena are heavily monitored, mobbing occurs at a low level. As such, mobbing is a consequence of poor management, since it creates such a social environment, in which various forms of bullying against officers are allowed. It is also important that despite the fact that many officers experience negative behavior exerted towards them, only a few of

them experience typical mobbing. Other phenomena are indirect and discrete, thus difficult to detect directly (Gavin, 2008).

As Icelandic experience shows, amongst the forms of mobbing in the police environment, sexual harassment is particularly visible, although it is not fully documented and is based on in-house research. It indicates that women most often experience mobbing and sexual harassment, while the perpetrators most commonly are men. Against this background, gender becomes an element of the culture of exclusion, and thus a broader cultural context of the issue exists, regardless of whether the perpetrators are conscious or not of such behavior (Steinþorsdóttir, Petursdóttir, 2018).

Lisa Denney from the Swiss Police, refers to the culture-related contexts of gender inequality in the Police directly, pointing out that social experiences are reflected in the police environment, which is why it is so important to change the prejudices and stereotypes that have existed for centuries and to highlight new standards that would be adapted to post-modern society. The first is to increase the representation of women in the police institutions and to improve integration within the organizational systems of these organizations. The second entails appropriate and explicit reaction not only to any forms of gender-based discrimination, but also to the security of operating within the organization's system. The third is to make greater use of individuals' specialized knowledge, regardless of gender, and thus to improve their image, but not owing to single-factor reasons, i.e. gender, but to the multifactorial ones, i.e. education, knowledge, expertise and operability. The fourth is to create an internal control system whose task would be to eliminate any forms of unequal treatment (Denney, 2019). For that matter, it should be borne in mind that, as Walentyna Trzcińska points out, women have been allowed to enter the police as guarantors of human rights, who are to ensure dignified treatment of women and children, victims, witnesses as well as the perpetrators. The presence of women in the police is also meant to ensure that certain categories of crime, often ignored by officers, such as domestic violence, sexual offenses and human trafficking, will be pursued and investigated more effectively (Trzcińska, 2005). Mobbing is therefore a phenomenon of a social nature, although it is manifested via specific interpersonal relations in a given social institution. The Police, where not only cases of violence are possible, but also where the malfunctioning management system allows such phenomena to occur among officers.

3. CONCLUSION

To sum up the above-presented considerations regarding the selected dysfunctional and socio-pathological phenomena of a 'group' nature existing in the police environment, it should be noted that such phenomena, despite being individual in nature, 'occur' within the social environment. In other words, on the one hand, these behaviors are considered dysfunctional or pathological, but on the other, certain adequate pathogenic conditions, i.e. socio-cultural ones, which authorize such behaviors, as well as processes that contribute to the occurrence of such behaviors exist (Moczuk, Bajda, 2016). In this case, it is important that while dysfunctional or pathological phenomena of an individual nature 'harm' individuals, the fact that such persons do not live in a social 'vacuum', causes the effects of their behavior to have social reference, since they occur within and affect the immediate surroundings, social groups and the whole of the society.

The reasons for these phenomena lie in the weakening of social ties, the disruption of interpersonal relations, the lack of behavior control, the increase in the tension between the

social needs and aspirations and the inability to realize them at a certain level and a specific time, as well as the intensification of various and conflicting interests of ethnic, cultural or religious groups (Dobieszewski, 2004). As such, behaviors that have destructive impact on a given society or on its part are inconsistent with the values recognized by a given cultural circle (although recognition thereof as dysfunctional or pathological is indeed associated with value systems), nevertheless they are narrowed to a given cultural circle, because not all cultures disapprove such behavior (Nowak, 2008).

Undoubtedly, such 'group' phenomena entail both extreme behavior in a professional situation or lack of readiness to oppose illegal influence, as well as mobbing, which has been analyzed.

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AGRICULTURE AS A UNIFER OF SECURITY AND DEVELOPMENT IN THE FACE OF FREE MARKET CHALLENGES

Individual stages of the implementation of sustainable development should be important to people in their drive toward effective production and economic goals. Successful implementation is vital to maintaining access to food. Sustainable development should ensure sufficient food supply for the population in various living conditions, maintain compliance with food health safety, and keep the needs of biodiversity into consideration. Over the last few decades, agriculture has undergone a huge change, and attention should be paid to the quality of food products, the fulfillment of conditions, and actions that must be taken at many stages of production and food trade in order to ensure an adequate human existence. A look at agriculture also allows us to see its multifunctionality in a changing global world. Ensuring food security, without violating ecological security, while maintaining elements of rural culture, presents significant challenges for national and global agrarianism. The neoliberal approach should also take into account not only the financial dimension but also the broader perspective of social responsibility.

Keywords: security, agriculture, economy, neoliberalism.

1. INTRODUCTION

As we know from the history of economic doctrines, physiocracy was the economic trend that emphasized the importance of work and agriculture for the development of the state. The fundamental thesis of physiocracy is that

The land is the only source of wealth, and agriculture – as the only productive activity, the only source of national wealth – is capable of multiplying this wealth. The land and management on it produce a pure product – new goods, a surplus over the costs of production (Czuma, 1997).

The struggle to introduce a fair distribution of goods can be heard today from many directions. On a global scale one can hear the voices of alter-globalists who cannot understand that wealthy countries not only pay a fortune for their food (subsidies), but also skillfully defend themselves against the import of agricultural products from the so-called Third World countries, causing their impoverishment? And a cow in the European Union

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has a higher income than half of the people living on the Earth. On a domestic level, questions are being asked – what does the fact that a poor pensioner, by paying tax, sponsors the treatment of a wealthy farmer whose well-being is counted in millions of zlotys have to do with the principle of solidarity?

2. SOCIO-ECONOMIC SECURITY AND THE SITUATION OF FARMERS

The peasant question appeared at the very beginning of the formation of the estate system. In literature, the peasant problem appeared in the 16th century. In order to advance to the highest level of public discourse in the 18th century and become the subject of social analysis.

In this situation, one can consider the eternal problem of peasant misery, or maybe it is so that “a peasant will not spare a living on” as Kazimierz Grześkowiak sings and “a peasant is a power and that's it” as the host of Wesele would have it. The peasant has never had it easy.

The peasant has never been a power in Poland. Quite the opposite: first an enslaved “boor” of serfdom, later a second-class citizen. With all the threat of collectivization, executions of compulsory deliveries, etc., he began to gain real social subjectivity, except perhaps in Greater Poland and the former crown lands, where this happened earlier only after World War II. It was precisely the degradation of the peasantry, along with the dwarfism of the Polish third estate, that was the primary cause of most of the historical misfortunes that befell the Republic and continue to degrade it to this day (Stomma, 2007).

Let us also list the basic issues that shaped the often stereotypical image of the peasant:

A. He was insulted. Since the Middle Ages, a term commonly considered pejorative began to be used – “boor”, from the name of one of Noah’s three sons. Later, even the Nobel Prize winner Henryk Sienkiewicz himself used the words: “With pitchforks to dung, boors! It is more fitting for you than a sabre” (Sienkiewicz, 2020), or “God, you see and do not thunder – boors drink such honey” (Sienkiewicz, 2020). The terms boor, boor, and you know what, boors appear more often on the pages of this book.

B. He was intimidated. It is impossible not to agree with the anthropologist Ludwik Stomma, who writes about the attitude of “serfdom”, and this term still existed in the Second Polish Republic, noting that “centuries of degradation left their mark”. The outstanding activist of the people's movement Wincenty Witos:

The peasant lived almost every day with fear and anxiety that were constant to him. He was terrified by the gendarme, the mayor, the official. He felt constant fear of the forester, the centurion, the field hand, he did not dare to raise his eyes to the priest, the teacher, the forester, the steward (Stomma, 2007).

C. He lived in an overpopulated village. Historian Feliks Konieczny notes that ignorance was combined with terrible poverty:

All estates became impoverished. The growth of the rural population was again crushed in the home village, finding no income or occupation in the neighboring impoverished cities and towns. There were so many people in the village that half of them would have been enough to till the land; the people had therefore learned involuntary laziness, and having no sufficient occupation for the whole

day, they sought employment in the tavern, and so everything went from bad to worse. The manor, growing poorer, gave less and less allowances, and the peasant needed allowances more and more often, and a mutual dislike began between the cottage and the manor (Koneczny, 1998).

D. There were tragic situations of violence. During the peasant strikes of August 16–25, 1937, the police of the free and independent Second Polish Republic killed 44 peasants. How can one assess the times when such violence was used? Or maybe it was rooted in the everyday order? The outstanding sociologist Józef Chałasiński presents one of the diaries of a farmer from the beginning of the 20th century: “There are many good sides to the village, but even more bad ones. The worst is the case of numerous parties that quarrel in a pile, and sometimes even beat each other with flails, knives, or clubs” (Chałasiński, 1938). The experience of violence was not unknown and was spread on different sides of the barricade, as well as among themselves. Such tragic events were not expected in the dream and independent country².

3. PEASANT PROBLEMS IN THE TIMES OF REAL SOCIALISM AND TRANSFORMATION

The Decree on the implementation of the agricultural reform of September 6, 1944 (Ogórkiewicz, Pęska, 2014) was the first step towards radical changes in agriculture in Poland after World War II. The reform was described as a “state and economic necessity”. It is worth noting that in order to implement it, real estates owned by individuals or legal entities with a total area exceeding (depending on the location in the country) 50 or 100 hectares of agricultural land were confiscated. The communist concept of agriculture was based on the idea that peasants should not possess arable land as their own. They could only receive a perpetual lease. It was recommended to create state-owned agricultural farms, so-called State Agricultural Farms (SAFs). Individual tenants could establish “collective farms” – kolkhozes, although this did not happen on a significant scale in Poland. A little over two thousand so-called cooperatives were created. A peasant was to be without land ownership and a hired worker, ruled by the party. The plan was partially successful in the so-called Western Recovered Territories, 65% of agricultural land was occupied by State Agricultural Farms. In 1989, State Agricultural Farms employed 435,000 people. Including families, this was about 2 million people. The population lived in 6,000 special settlements.

Today, if we were talking about the former post-SAFs areas, we would be dealing with a generation of the rejected – the underclass. The public opinion learned that already in the 1950s their world was portrayed as incomprehensible and gloomy, and the people living there as primitive, not caring about the aesthetics of their surroundings (Szpak, 2005). A visiting student recalls:

I expected to find stupid, drunk people with whom it is impossible to talk at all. Although they most often talk about the relations prevailing in the SAF and about earnings, sometimes they are interested in other matters, e.g. politics. They have

² Times are changing and no one is shooting farmers with live bullets. 62 years after the tragic events of the “peasant strikes” – on August 19, 1999, even the situation became different. During street clashes in Bartoszyce, 83 policemen were injured. The agricultural activist, later Deputy Prime Minister Andrzej Lepper, said significant words then: “I believe that too few policemen are injured”.

a specific view of the world. It is true that almost everyone drinks a lot (Szpak, 2005).

There are many stereotypes and myths about the countryside and agriculture, and they still cause a lot of strong emotions. A successful attempt to show the stereotype: “life is better in the countryside than in the city” was demonstrated by sociologist Krystyna Lutyńska, who conducted research among workers during the Polish People's Republic, which clearly showed the superiority of the countryside over the city. The workers' answers were as follows: they have their own food (“they don't stand in lines”), they have apartments (“they live in villas”), they have luxury items (“they don't have problems buying basic necessities”), they have property and are independent (“they have freedom, they are free and they don't have bosses”), they are privileged (“the state submits to the peasants – it pays them well”), working in the countryside is now easier (“the peasant doesn't do anything now – everything is done by machines”), the peasants sell food illegally and at very high prices (“they prey on the workers”), they live in prosperity (“they have money, they live like in paradise”). Of course, this image could not be shared by the farmers themselves.

How can we reconcile this now, when the times of the free market have come, with the mentality of a patron-client approach to socio-economic reality. And the eternal pressure for state intervention, creating a special niche for the chosen ones. With a love for the equality of needs and their equal satisfaction. In addition, with the baggage of wrongs that have been done in recent years. Krzysztof Gorlach, a rural sociologist, once put forward the thesis that the peasant question becomes from time to time a real social problem, a source of social disorders, giving rise to various conflict situations, in society and within the political system (Gorlach, 1995).

4. LIBERAL APPROACH TO AGRICULTURE IN AN INTERNATIONAL PERSPECTIVE

New Zealand is a laboratory case for agricultural change and a favorite illustration of neoliberal reform.

Characteristics of New Zealand agriculture before reform (Kwaśnicki, 2010):

- In the 1960s, subsidies for agriculture amounted to about 3% of farmers' income. In 1983, it was already several dozen percent, e.g. almost 40% for sheep farmers. In the 1980s, subsidies for agriculture reached 4% of GDP.
- The number of ways of subsidizing agriculture was constantly growing, there were 30 different ways of financing, e.g. subsidies for the licensed number of animals, subsidizing the purchase of artificial fertilizers, reduced interest rates on loans, lucrative subsidies for fertilizing the land, subsidies to prices.
- In parallel with the expansion of aid programs for agriculture, the bureaucracy and the number of “civilian workers” employed to implement and control these programs grew.
- With high subsidies, there was no interdependence between demand and supply. Production was growing, but there were no buyers (the best example in New Zealand was mutton and lamb). In 1983, 6,000 tons of lamb were used for feed and fertilizer because there were no buyers.
- With large subsidies, prices did not reflect market value. For example, land prices rose as the government paid for land. In the 1970s and 1980s, prices doubled.

- There was mismanagement related to the use of every piece of land that could be considered agricultural land since the government subsidized it. It is estimated that in 1984, such irrationally used land was about 2 million hectares. It is very interesting and worth noting that the most important farmers' organization in New Zealand, Federated Farmers of New Zealand, came up with a proposal for changes, presented the government with a petition in which, among other things, it was postulated that instead of, for instance, expanding the subsidy system and paying farmers compensation for high inflation, the government should start taking care of the quality of money, reminding that the high budget deficit (mainly caused by high subsidies for agriculture) is the cause of inflation (Ibidem). Therefore, it was postulated to stop subsidizing agriculture as soon as possible, so as not to further worsen the economic situation (Ibidem). However, the farmers' petition was rejected by Prime Minister Rob Muldoon (Ibidem).

A lot has changed with the next government, and especially with the Minister of Finance Roger Douglas. His reforms have been called Rogernomics, a term coined after Roger Douglas, following the example of Reaganomics in the USA (<http://www.old.pafere.org/userfiles/image/edukacyjne/wrg-nowazelandia.pdf>).

A revolution began in New Zealand when the pro-market government began to introduce deep economic reforms (Pytlarska, 2014): (taxes were lowered, the economy was deregulated and liberalised, privatisation began, the labour market was freed, unemployment was reduced, government spending was reduced, a budget deficit was replaced by a budget surplus, and the public debt was reduced).

Characteristics of New Zealand agriculture in the face of free-market reform:

- After the elimination of agricultural subsidies and import barriers, this branch of the economy multiplied its exports. Export subsidies were also eliminated.
- Farmers stopped receiving support from the state in the form of agricultural subsidies or cheap, low-interest loans.
- Minimum prices for agricultural products were eliminated, and they are not protected from foreign competition by import tariffs (currently, there are no administrative restrictions on over 90% of all goods imported to New Zealand).
- Exports of agricultural products from New Zealand have developed unexpectedly. In 1984, it amounted to less than NZD 5.5 billion, and in 2004 it was already NZD 15.3 billion. Agriculture constitutes about 5% of the economy, and brings as much as 53% of export income.
- Productivity of New Zealand farms, which grew at a rate of 6% per year. Currently, cows produce one third more milk than 20 years ago. Lamb production increased by 12%, even though sheep numbers fell by 40%, because previously sheep were bred mainly to receive subsidies.
- It was predicted that over 8,000 farms would go bankrupt, but only 800 (about 2% of all farms) went bankrupt. Producers were given the dilemma of 'either you get down to work or you go bankrupt', and the former was chosen.

The list (presented in Kiwi Outlook, based on the New Zealand experience) of the negative effects of subsidies is interesting (Ibidem):

1. Outrage among farmers – many of them consider subsidies to be unfair.
2. Outrage among consumers (who are not farmers) who pay twice for subsidies, once in the form of higher taxes and a second time in the form of higher food prices.

3. Encouragement to overproduction, which causes a drop in the prices of agricultural products and increases the growth in subsidies to compensate for lower incomes of farmers.
4. Encouragement to use all possible land resources by farmers, which most often results in a deterioration of the natural environment.
5. It turns out that the money from subsidies that farmers receive very quickly passes to agricultural supply companies, processing companies, and other sectors related to agriculture, so that, contrary to the government's intention, the biggest beneficiaries are not farmers.
6. Additional distortions of market mechanisms include, for example, a decrease in the value of land as a result of cheap loans.
7. Various bureaucratic absurdities, such as paying farmers to rebuild nature-protecting infrastructure, such as hedgerows or wetlands, when twenty years earlier they were paid to remove them; thus, the more thrifty ones who maintained hedgerows and wetlands all along got nothing, neither before nor after.

New Zealand was the initiator of the Cairns Group (<http://cairnsgroup.org/pages/default.aspx>), a consortium of countries that has been lobbying for the liberalization of agricultural trade since the 1980s. One of the important achievements of the Cairns Group is to make the world community aware of how unfair it is for the EU, the US and Japan (Ibidem). To maintain high subsidies and high import tariffs. These countries achieved prosperity through free trade and now they are blocking the same path of development for less developed countries (Ibidem).

The image of New Zealand is completely different from the policy of the USA, the country where the first industrialization, mechanization and highly commercialized agricultural production appeared in the world. For instance, former presidents Bill Clinton and George W. Bush declared themselves as staunch supporters of the free market. Both defended the North American Free Trade Agreement (NAFTA) and were aware that subsidies for farmers caused huge losses for farmers from Canada, Mexico or Chile (they did not give a chance to compete with the Americans) (<http://www.newsweek.pl/swiat/made-in-usa,26749,1,1.html>). However, in 2000 almost all agricultural regions voted for Bush (Ibidem). So the increase in subsidies became mainly a repayment of election debts. Also previously Clinton forced Congress to increase subsidies and in this way gave farmers an additional 2.4 billion dollars (Ibidem). In the years 2002–2012 alone, Americans spent 190 billion dollars from the state treasury on subsidies for farmers. At the expense of other taxpayers, additional money was given to producers of grain and cotton, wool, milk and peanuts, cattle breeders and fruit growers (Ibidem). They spend nine times more on subsidies for agricultural production on their territory than the GDP of Congo with its 66 million inhabitants (Kołodko, 2008).

The USA is also a country of figures such as the libertarian David Friedman, son of Rose and Milton Friedman. In his work “The Hidden Order: The Economics of Everyday Life” he recalled the free market assumptions (Friedman, 2008):

The potato lobby convinced the government that potatoes are healthy and that for this reason their cultivation should be subsidized. As a result, potatoes are cheaper, to the benefit of us consumers. People buy more potatoes and farmers are happy. The world is developing. However, there is a problem – someone has to pay for the subsidy. Let's assume, to keep things simple, that everyone has the same income, the same tastes and pays the same taxes. Since the subsidy is

a dollar per kilogram, and everyone now buys twenty kilograms of potatoes per month, we all also pay \$20 per month in taxes to cover the cost of the subsidy. Everyone pays \$20 per month in taxes and gets this money back when they buy 20 kilograms of potatoes at subsidized prices. In accounting, a transaction in which the two sides cancel each other out – a \$1,000 revenue is offset by a \$1,000 expense – is called a sham transaction. That's what happens with taxes and subsidies – we get what we pay.

5. AGRICULTURE AND POLISH NEOLIBERALS

In Poland, neoliberals criticize the subsidy system in the European Union and in Poland within the framework of the “common agricultural policy”. Let us recall that the main concepts were included in the Treaty on the Functioning of the European Union in the chapter on agriculture and fisheries. According to Article 39, it is postulated (Guba, 2002):

- increasing agricultural productivity by supporting technical progress,
- developing agricultural production, as well as optimal use of production factors, especially the workforce,
- ensuring an adequate standard of living for the rural population, especially by increasing the individual income of people working in agriculture,
- stabilizing markets in all regions of the EU,
- ensuring security of supplies,
- ensuring reasonable prices in supplies for consumers,
- guaranteeing food safety,
- caring for the health and decent conditions of animal husbandry.

J. Wozniński in „To nie musi być państwowe” (“It Doesn't Have to Be State-Owned”) notes that

despite this obvious and sinister lesson that the communist experiment has taught humanity, attempts to subordinate agriculture to state authority have not ceased. The new state that is emerging today, the European Union, has been pursuing a consistent policy of subordinating all agricultural production to the state for several decades. The system of subsidies, production limits and comprehensive market control mean that the foundations of civilization are once again under threat. The strategy of the European Union is different from that used by the communists because, instead of collectivization, it introduces a system of universal control while maintaining puppet private property. In the long term, however, the effect will be the same: if the European Union survives the coming years, a grey zone of agricultural products will be created across the continent, saving the masses of people who will not be able to afford officially produced food.

Subsidies within the EU Common Agricultural Policy were supposed to serve poor farmers as part of solidarity. Supporting agriculture costs the EU taxpayer an average of 100 euros per year. In reality, food corporations and billionaires from European families increased their profits within the framework of agricultural policy; owners of castles, hunting grounds, ponds, aristocrats and even queens of Great Britain and Denmark. Support was obtained by the well-known British confectionery corporation Tate & Lyle and the Nestlé corporation. After joining, the British learned how to scheme to illegally or

creatively use the law to extract money from the common EU bag. There was a well-known fraud with an organic egg farm that sold significantly more eggs than the “happy hens” raised on the farm laid. The Greeks invented the cultivation of plastic olive trees. The Spanish subsidized domestic dairies, although instead of breeding cows, they imported milk from the People's Republic of China. In Italy, the mafia reached for subsidies, and farmers received subsidies for the production of milk and dairy products, although every fifth cow for which subsidies were collected did not exist at all. Can the subsidy received by the so-called “farmer” on whose land a golf course was operating be called solidarity?

In Lower Silesia, Poland, the owner of a go-kart track received EU money, while in Masuria, the owner of the land where the airport runway was located, as well as the owners of recreational plots who reported them as agricultural land. The most famous was Polish walnuts (<http://forsal.pl/artykuly/618356,sztuka-wyludzania-unijnej-kasy-najgorsze-przekrety-dopiero-przed-nami.html>), which were used by farmers – or people who became farmers overnight, such as lawyers from a law firm in Warsaw. For planting 50 walnut trees on a hectare of land, they could receive a subsidy for organic farming – PLN 2,800 per hectare³, including (<https://www.polityka.pl/tygodnikpolityka/rynek/1518054,1,jak-polacy-doja-unie-na-eko-zywnosci.read>):

- direct subsidies per hectare in 2010 amounted to PLN 562.09.
- another PLN 327.28 was added for “supplementary area payment”.
- another PLN 173 was added for farming in unfavourable soil conditions (over half of our agricultural land is entitled to this title).
- payment for organic walnut cultivation – PLN 1,800 (Ibidem).

As part of the savings, seedlings were often imported from China (Ibidem). Untended meadows overgrown with weeds appeared, among which it was difficult to find nut seedlings (Ibidem). The owner of the “plantation” would be afraid of the certifying company, if he really had nuts (Ibidem). It could refuse to issue a document certifying that they were organic (Ibidem). But there are no nuts and never will be, why does he need nuts, since he gets money anyway (Ibidem)? According to the plan, no one asked him about the crops (Ibidem).

The liberal „Najwyższy Czas!” (“High Time!”) cited the report of the Supreme Audit Office ([http://nczas.com/wiadomosci/polska/jak-dzialaja-dotacje-doplaty-do-rolnictwa/\[16.04.2015\]](http://nczas.com/wiadomosci/polska/jak-dzialaja-dotacje-doplaty-do-rolnictwa/[16.04.2015])):

- Most organic fruit and berry crops were established for one purpose: to obtain subsidies. The NIK audit showed how this mechanism worked.
- As a result of subsidies for organic fruit and berry crops, the productivity of crops dropped dramatically – from 15 to 1 tonne of fruit per hectare.
- Plantations were often neglected: planted in unfavourable conditions (e.g. on waterlogged and poor soils), and due to the lack of fencing, exposed to destruction by wild animals.
- Only slightly more than half of farmers receiving subsidies obtained any yield.
- Most farmers liquidated or intended to liquidate crops when they stopped receiving subsidies.

³ There are known examples of taking subsidies from over a thousand hectares.

6. CONCLUSIONS

For neoliberals, the model example is the achievements of New Zealand, where farmers have to count only on themselves. After the introduction of reforms, farmers did not go bankrupt, and consumers pay lower prices for food than residents of the “Old Union”. In Poland after 1989, there was an attempt to introduce a liberal agricultural policy. The main assumption was to be large-area and industrial agriculture, and Prime Minister Leszek Balcerowicz, considered a liberal, wanted to eliminate around 2,000,000 smaller family farms in the whole of Poland. Peasants were to be fewer in number, they would not create larger rural communities, so there would be no villages as economic, class, cultural and political entities (See: Staszyński, 2010). One of the problems remains the debate on the duration of agricultural subsidies. In the EU, there is still a declared desire for consumers to eat safe food, and the legality of producers' actions in the area of subsidies was controlled by the European Anti-Fraud Office.

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ANALYSIS OF THE LEVEL OF KNOWLEDGE AND ACCEPTANCE OF THE LOCAL CURRENCY BY REPRESENTATIVES OF GENERATION Y

The article analyzes the results of a survey that assesses the knowledge and attitude of Generation Y Polish representatives toward the functioning of the local currency. The empirical material consists of the results of surveys conducted among a group of 619 Polish residents belonging to Generation Y. The analysis of the survey results confirmed the research hypothesis, which assumes that despite the low level of knowledge of Generation Y representatives about the functioning of local currencies, their attitude towards such a means of payment allows us to conclude that the carrying out of a large-scale educational campaign may significantly impact the development of complementary currencies in Poland. The work is mainly directed at local government officials and local initiative groups that want to influence the development of local entrepreneurialism and increase the wealth of residents by introducing local currency into circulation.

Keywords: local currency, knowledge, acceptance, generation Y.

1. INTRODUCTION

Local currencies have been known and used to complete commercial transactions for hundreds of years. Over the centuries, local rulers issued them to show their independence, wealth, and to enrich themselves at the expense of their subjects. The rulers who issued it also noticed its positive impact on the economic development of the lands they ruled. The purchasing power of this currency was guaranteed not only by the value of the metal contained in it, but also by the authority of the issuer, who, in the opinion of his subjects, often owed his position to God's grace.

Today's known local currencies begin their history in the 1930s, when during the Great Depression, in order to stimulate the local economy, such a means of payment was introduced in the Austrian town of Wörgl³. Although the Wörgl shilling was in circulation

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³ The experiment conducted in the Austrian city of Wörgl was based on the theory of the Natural Economic Order developed by Silvio Gesell. Within it, he presented the concept of free money (German: Freigeld). According to this theory, money loses value over time. The experiment

for only less than 15 months (July 1932 – September 1933), the economic results of this experiment (local economic growth and reduced unemployment) were noticed not only in Austria, but also abroad⁴.

In 1934, the local currency WIR franc (CHW) was introduced into circulation in Switzerland and has been in operation on the market for ninety years. Initially, it was used by 16 members of the cooperative⁵, and at the end of 2021, Bank WIR serviced 26,000 accounts of corporate clients and 7,500 accounts of private clients in WIR franc (Bircher-Suits, Felix Ertle 2021)⁶.

In the last decades of the 20th century and at the beginning of the 21st century, there was great interest around the world among local communities in introducing this type of currency. Currently, there are more than 6,000 local currencies in economic circulation around the world.

In Europe, local currencies can be found in many countries, including: in Belgium⁷, the Czech Republic⁸, France⁹, Greece¹⁰, Germany¹¹, Russia¹², Slovakia¹³, Switzerland¹⁴, Hungary¹⁵ and Great Britain¹⁶. Local currencies were also introduced in Poland. Examples of such local currencies are Dobry, Piast, and Zielony. It should also be remembered that

carried out in 1815 on the island of Guernsey can also be considered as the prototype of such activities.

It should also be noted that in 1929, mining engineer Max Hebecker introduced the WÄRA currency into circulation in Schwanenkirchen, Bavaria. In his lignite mine, he paid employees salaries in the following proportion: 2/3 of the salary in WÄRA and 1/3 in German marks. Conducting this experiment stimulated the local economy and reduced unemployment. Unfortunately, the use of such means of payment was administratively banned in 1931. <https://www.hengersberg.de/de/markt-hengersberg/geschichte/waera.html> (25.02.2024).

The secured means of payment (exchange bill) WÄRA was issued by the so-called Wära Exchange Society founded in October 1929 by Helmut Rödiger and Hans Timm in Erfurt. <https://de.wikipedia.org/wiki/W%C3%A4ra> (25.02.2024).

⁴ Not only were economists, entrepreneurs, and local government officials interested in the course and results of the experiment, but also world-famous politicians, such as French Prime Minister Édouard Daladier or the future prime minister of the United Kingdom Winston Churchill.

⁵ Its issuer is WIR Bank (originally Swiss Economic Circle), founded by Werner Zimmermann and Paul Enz. The inspiration to create this bank was the Danish Andelsselskabet Jord Arbejde Kapital.

⁶ It should be noted that the number of economic entities using the WIR currency has decreased – 20 years ago there were approximately 60,000 of them.

⁷ Examples of Belgian local currencies – Blés, Carol'Or, Eko-Iris, Res, Ropi, Talent, Torekes, Zinne.

⁸ Sample Czech local currency – Křižánecká koruna.

⁹ Examples of French local currencies – L'Abeille, Cairn, Commune, Doume, Eusko, Gonette, Occitan, Pêche, Roue.

¹⁰ Sample Greek local currency – lios.

¹¹ Examples of German local currencies – Bethel-Euro, Chiemgauer, Coinstatt, Donautaler, Hallertauer, Pauer, Ronald.

¹² Sample Russian local currency – Kolion.

¹³ Examples of Slovak local currencies – Zvolenský živec, Košický dukát.

¹⁴ Examples of Swiss local currencies – Bonobo, EulachTaler, Farinet, NetzBon.

¹⁵ Examples of Hungarian local currencies – Balatoni Korona, Bocskai Korona, Soproni Kékfrank, Tokaji Dukát.

¹⁶ Examples of British local currencies – Bristol Pound, Brixton Pound, Eko, Exeter Pound, Lewes Pound, Stroud Pound, Totnes Pound.

in the years 1960-1989 in Poland there was a currency in circulation complementing Pekaó vouchers, which are considered a type of local currency.

In North America, both Canada and the United States have local currencies issued by many communities. Examples of such currencies operating on local markets in these countries include: BerkShares, Calgary Dollars, Detroit Community Scrip, Toronto Dollar. In South America, local currencies were issued, among others: in Argentina, Brazil, Peru, and Uruguay. An example of a local currency issued in South America is Argentine currencies: Argentino, Crédito, LECOP, Patacón, or Brazilian currencies: Banco Palmas, Curitiba Bonus, Saber, Yscambau. In Asia, local currencies are issued, among others: in China, Indonesia, Japan, Korea, Malaysia, and Thailand. In turn, in Africa, local currencies are issued, among others: in Kenya (Eco-Pesa), Senegal, and South Africa (Ora). Local currencies are also issued on the Australian continent. Local currencies can be found in Australia (Baroon Dollar, The Fremantle Share), New Zealand and Papua New Guinea.

It should be emphasized, however, that although many communities around the world representing both small villages (e.g. Křižánky¹⁷) and large cities (e.g. Paris, the capital of France) are interested in introducing local currencies into circulation, their lifespan usually does not last longer than a few years. Only a few currencies manage to achieve long-term success and appear on the local or even national market in the long term (e.g. WIR franc).

2. LOCAL CURRENCY

Local currency, i.e., the so-called human money, is the third type of money next to bank money and government money (Douthwaite, 1999). It can be defined as an alternative payment tool accepted by local communities, issued by local institutions that do not have the right to issue money in a given country, and therefore it is not legal tender. It is usually used to settle liabilities in a small area (city, district, or region). It functions as a complementary currency in relation to the national currency, instead of replacing it (Sołtysiak, 2021; Sołtysiak, 2020).

Since the successful issuance of local currency in the Austrian city of Wörgl, currencies issued by subsequent local communities¹⁸ are not only intended to create an alternative form of payment for products and services produced by representatives of the local community, but above all to be a factor influencing the improvement of the results of the local economy¹⁹ and a tool allowing for reducing the level of risk associated with capital flight from the local market (Sołtysiak, 2021). „It is important to emphasise that local currencies can play an important role in the development of a stable and diverse region. They encourage direct transactions between neighbours. They are not only an economic tool., but also a cultural tool” (Swann, Witt, 1995). Local currencies can be a helpful tool in building a civil society that, through joint activities, can influence the development of local entrepreneurship and increase the wealth of residents (Ranalli, 2013; Sołtysiak, 2021). They can function in economic transactions only if there is cooperation between business entities and local partners and the willingness to accept it among business partners

¹⁷ A village in the Czech Republic with 390 inhabitants.

¹⁸ The issuer of local currency, taking into account the legal provisions applicable in this respect in individual countries, may be public authorities, foundations, enterprises, cooperatives, associations, and even natural persons or groups of persons.

¹⁹ A local currency also encourages individuals and businesses to support each other and can help meet the credit needs of small businesses, thereby stimulating the local economy and diversifying its economic base (Pacione, 2011).

and consumers (Collom, 2011). This is due to the fact that the issuance of local currency is a bottom-up activity initiated by local communities. And the success of this activity is only possible with the full involvement and participation of members of the local community.

When planning the issuance of a local currency, care should be taken to ensure that it emphasizes the functions of a medium of exchange and a unit of account and minimizes the saving function. Its mobility, i.e. its geographical scope of validity, must be limited to a reasonable extent and its value as a means of storage must be limited to being "merely" stable (Kennedy, Lietaera, Rogers, 2012).

The literature on the subject contains opinions that a well-designed local currency may allow the achievement of such goals as²⁰ (Kennedy, Lietaera, Rogers, 2012):

- Selective stimulation of the regional economy.
- Development of a sustainable financial system that provides better protection against the effects of financial speculation.
- Provide new sources of liquidity, especially for small and medium-sized enterprises, leading to the expansion of their products and services in regional markets.
- Create jobs.
- Increasing the potential to create added value and surplus in the region.
- Closer contacts between producers and consumers: shorter transport distances and lower energy consumption.
- Outsourcing and co-production of public services for social economy organisations – cooperatives, charities, social enterprises.
- Strengthening regional identity and self-help attitudes, which can bring many other beneficial changes.

It should be emphasized, however, that although the local currency is treated by many people as a tool to alleviate the local economic crisis, its introduction alone does not guarantee success. The introduction of such a currency should be preceded by comprehensive information and educational activities. The basic goal of these activities, in addition to providing information about the functioning of the local currency, should be to build confidence in the society in using such a means of payment. But even such actions do not guarantee the achievement of the intended economic effects. Enthusiasts of introducing a local currency into circulation must also be aware that the success of such an issue may also be determined, in addition to economic and social factors, by legal conditions resulting from the central authorities' fear of losing control over the money supply.

When taking actions aimed at introducing a local currency into circulation, one should bear in mind that the main motives for creating and participating in local currency systems include: community building (reviving and improving local social networks), promoting alternative values through economic exchange, creating alternative sources of income, less dependent on formal employment, and ecolocation, i.e., the ecologically motivated location of production and consumption networks (Dittmer 2013).

The currencies issued by local communities are not defined in a uniform way because they do not constitute a homogeneous group. Among the community currencies, there are

²⁰ M. Kennedy, B. Lietaera, J. Rogers point out three main goals of introducing a local currency into circulation: creating local jobs, stopping the outflow of purchasing power from the region, opening new roads enabling local governments to fulfill their assigned tasks (Kennedy, Lietaera, Rogers, 2012).

several basic groups, including: LETS (Local Exchange Trading Systems or Schemes), Time banks, HOUR currencies, or CLCs (Convertible local currencies). J. Blanc points out that these currencies have two common characteristics: they are nonnational (i.e., they are designed and implemented by civil society, not by governments) and they are not profit-orientated currencies (Blanc, 2011).

It should also be noted that the basic features of the local currency include:

- openness – every interested member of a given community, regardless of whether it is a business entity or a natural person, can use this currency;
- democratic nature – all members of the system have access to information and exercise control;
- closed circulation – the currency is accepted in a limited area, only by entities that have consented to it;
- forced circulation – the local currency usually has a specific validity period, the extension of which is associated with incurring additional costs (negative interest rate);
- higher circulation speed;
- Interest-free – it does not generate debt, only costs related to maintaining the transaction system;
- complementarity – local currencies constitute a complementary means of payment to the national currency;
- linking the value of the local currency usually to the national currency in a 1:1 ratio or to the value of an hour of work.

It should also be noted that this type of Community means of payment, in addition to numerous advantages, also have a number of disadvantages, which are presented in Table 1.

Table 1. Advantages and disadvantages of introducing a local currency

Advantages	Disadvantages
<ul style="list-style-type: none"> • Local currency can influence the development of local communities and enables SMEs, farmers, local craftsmen, and traders to actively participate in local initiatives. • The local currency circulates faster than the national currency - this allows you to achieve higher income in a given period of time. • Complementary currencies facilitate more economical production and also meet unique local and regional needs. • The local currency promotes cooperation between economic entities without previous trade relations and strengthens existing cooperation. Thus, it creates a more favourable environment for innovation and development. 	<ul style="list-style-type: none"> • The need to create a non-profit organisation for the sustainable functioning of the local currency system. This organisation must establish a demand and supply register - which will need to be constantly updated - on businesses and non-profit organizations dealing in the local currency system. • At the initial stage, the difficulty of convincing local entrepreneurs to cooperate within the local currency system. The next stage involves difficulties related to motivating stakeholders and managing communication between them. • Access to local currency is easy, but frugal spending requires thoughtful past decisions.

Table 1 (cont.). Advantages and disadvantages of introducing a local currency

Advantages	Disadvantages
<ul style="list-style-type: none"> • The local currency system allows partial bypassing development funds from outside the region and favours endogenous development. • The local currency improves the payment morale of participants because holders of the instrument do not gain any benefit by retaining the local currency and do not derive any profit from its accumulation. • By supporting health care, education, and environmental protection, a local currency system can facilitate better use of the region's potential and better use of skills and experience. 	<ul style="list-style-type: none"> • The local currency system gives the impression that SME entities are able to compete with stronger national, multinational, or transnational corporations. • The success of a monetary system depends largely on stakeholder behaviour and liquidity. • When using a local currency system, consumption takes priority over savings. However, the increase in consumption is accompanied by short-term economic growth, which does not significantly improve the quality of life.

Source: own study based on (Kennedy, Lietaer, 2004; Lietaer, 1999; Sołtysiak 2021; Tóth, 2011).

3. RESEARCH AIM, EMPIRICAL MATERIAL, AND RESEARCH METHODS

An empirical analysis of the level of knowledge of issues related to the functioning of the local currency among representatives of Generation Y and an examination of their attitude toward the introduction of such a currency into circulation was carried out in a group of 619 respondents. The study was carried out using a survey questionnaire in 2023. It is the next stage of the research conducted in 2020. The research group included 348 women (56.22%) and 271 men (43.78%). The respondents who participated in the study were divided into five segments according to place of residence, four segments according to income per family member, and three segments according to level of education. The structure of the research group is presented in Figure 1.

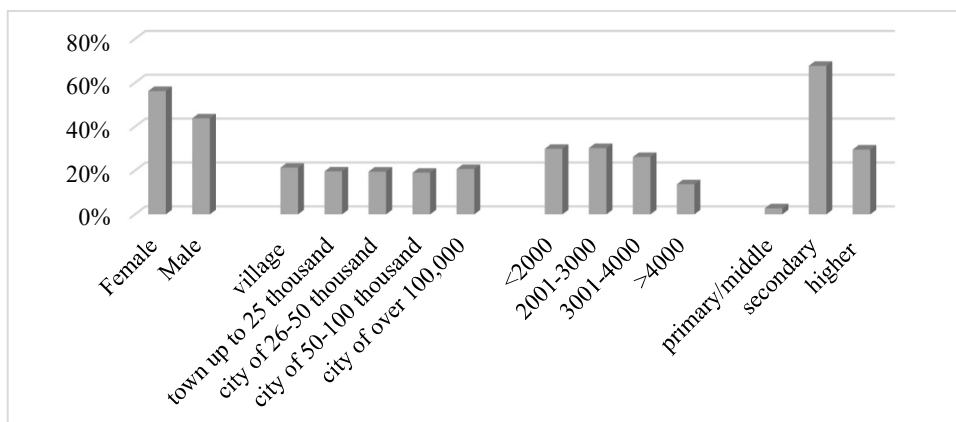


Figure 1. Structure of the research group (%)

Source: Study based on own research.

The main aim of the research was to determine the level of knowledge of issues related to the functioning of local currencies among Polish representatives of Generation Y and to examine their attitude towards the introduction of such a currency into circulation.

The literature research conducted has shown that the research results presented in the article can significantly contribute to reducing the research gap in this area. It should be emphasised that there are no studies with which the results obtained could be compared, and the research results presented in the literature concern representatives of other generations (Sołtysiak, 2021).

4. RESULTS

The analysis of the results of the survey allowed us to conclude that the issue of the functioning of local currencies is relatively little known among Polish representatives of Generation Y (Figure 2). Only every sixth survey participant declared that they were familiar with the concept of local currency. This declaration was made more often by men (16.24%) than by women (15.23%). The highest percentage of respondents with knowledge about the concept of local currency was among: respondents living in cities with more than 100,000 inhabitants (20.88%), declaring income in the range from 2,001 PLN to 3,000 PLN (24.06%), having higher education (20.77%).

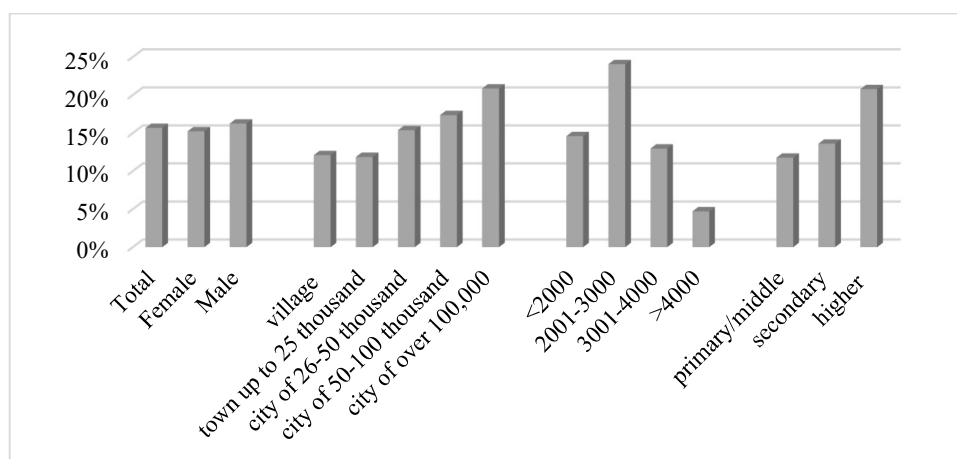


Figure 2. Level of knowledge of the concept of local currency

Source: Study based on own research.

Interestingly, the percentage of respondents with knowledge on this subject increased with the size of the town they lived in and with their level of education. However, the increase in income per family member had no impact on the increase in the percentage of respondents knowing the concept of local currency. This allows us to confirm the hypothesis that an increase in the level of education and an increase in the number of inhabitants of the town in question influence the increase in knowledge on this subject. Additionally, disprove the hypothesis that an increase in income translates into an increase in the percentage of respondents who know this issue.

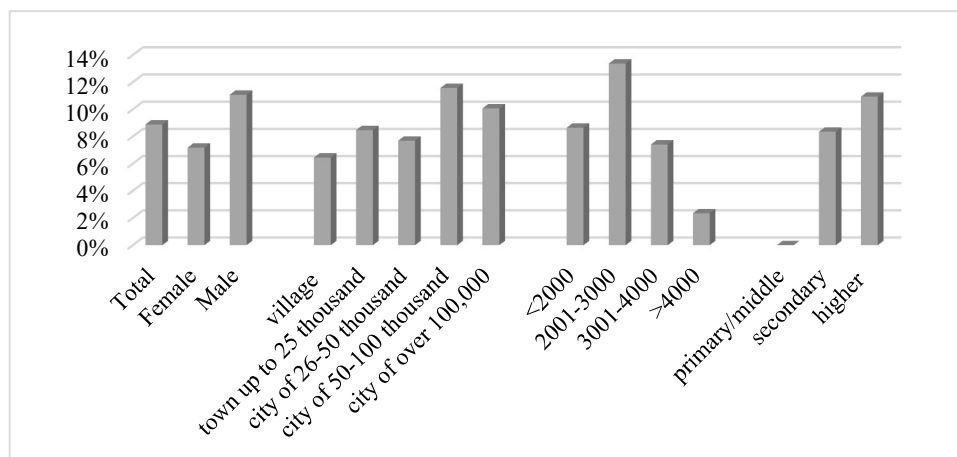


Figure 3. Level of knowledge of the local currency in circulation

Source: Study based on own research.

Taking into account the fact that local currencies are very rarely found in payment circulation, it is not surprising that only 8.89% of respondents (7.18% of women and 11.07% of men) declared knowledge of any local currency in circulation (Figure 3). This knowledge was most often declared by respondents who were residents of cities with a population of 50,000 to 100,000 inhabitants (11.57%), who declared an income ranging from 2,001 to 3,000 PLN (13.37%) and having higher education (10.93%). It should also be noted that the analysed research group included 1.45% of the respondents (0.86% of women and 2% of men) who declared that they made payments in local currency.

Respondents' opinion on the introduction of local currency into circulation

Most representatives of Generation Y participating in the research were not interested in introducing a second parallel currency into circulation in the form of a local currency (Figure 4). 46.69% of the respondents (46.27% of women and 47.23% of men) answered definitely not and probably not. The highest percentage of opponents of introducing the local currency into circulation was among rural residents (51.61%), respondents with an income per family member of more than 4,000 PLN (49.41%), respondents with primary education (58.82%). This group should also include respondents who answered I have no opinion (26.17% – 25.86% of women and 26.57% of men).

Only 27.14% of the respondents believed that such a currency should be introduced into circulation. There was a greater interest in using the local currency among women (27.87%) than among men (26.2%). Taking into account the place of residence of the respondents, it was found that the largest percentage of those interested in introducing a local currency into circulation lived in medium-sized cities (in cities with 26–50 thousand inhabitants, 32.48% and in cities with 50–100 thousand inhabitants – 31.41%), and the smallest in villages (13.71%). In turn, taking into account income, it was found that the largest group of supporters of the introduction of the local currency was among respondents whose income per family member was less than 2000 PLN (29.19%) and the smallest group was among respondents with income above 4000 PLN (25.88%). However, taking into account the level of education of the respondents, the highest percentage of respondents

interested in introducing the local currency was among respondents with secondary education (29.83%) and the smallest among respondents with higher education (21.31%).

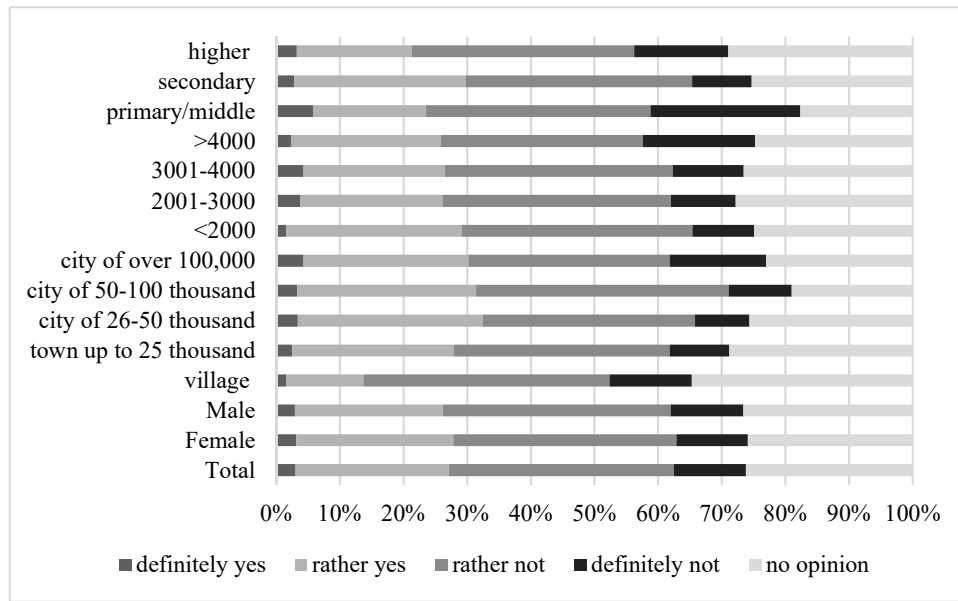


Figure 4. Opinion of respondents on the introduction of local currency into circulation
Source: Study based on own research.

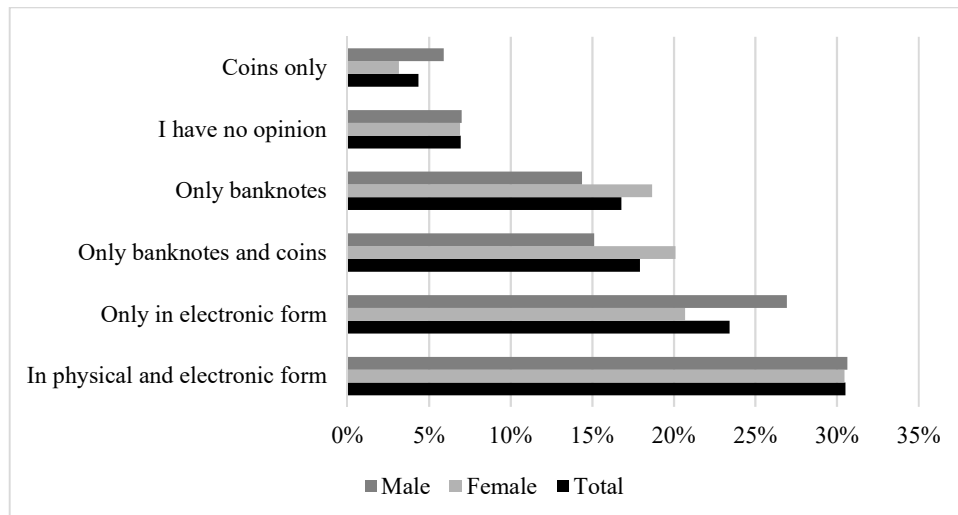


Figure 5. The form of introducing the local currency into circulation preferred by the respondents
Source: Study based on own research.

The survey participants also expressed their preferences on the form in which they would like to use the local currency if it were introduced into economic circulation (Figure 5). About 30% of the respondents said that the local currency should be issued in physical and electronic form. Each fourth respondent declared their willingness to use such a currency only in electronic form. It should be noted that 30.46% of women and 30.63% of men wanted to use local currency in electronic or physical form. However, the possibility of using it only in electronic form was supported by 20.69% of women and 26.94% of men.

Almost 18% of the respondents believed that the local currency should be issued in the form of banknotes and coins, and almost 17% of the respondents believed that it should be issued only in the form of banknotes. Women indicated such answers more often than men. The answer to banknotes and coins was given by 20.11% of women and 15.13% of men, and the answer to only banknotes was given by 18.68% of women and 14.39% of men.

It should be emphasised that only 4.36% of respondents (3.16% of women and 5.9% of men) believed that the local currency should be issued only in the form of coins.

The fact that more than half of the survey participants were of the opinion that this type of means of payment should be issued in electronic form may indicate a large share of respondents in the research group who prefer this method of payment on a daily basis and perhaps that the respondents want to avoid additional costs that would be generated by issuing banknotes and coins.

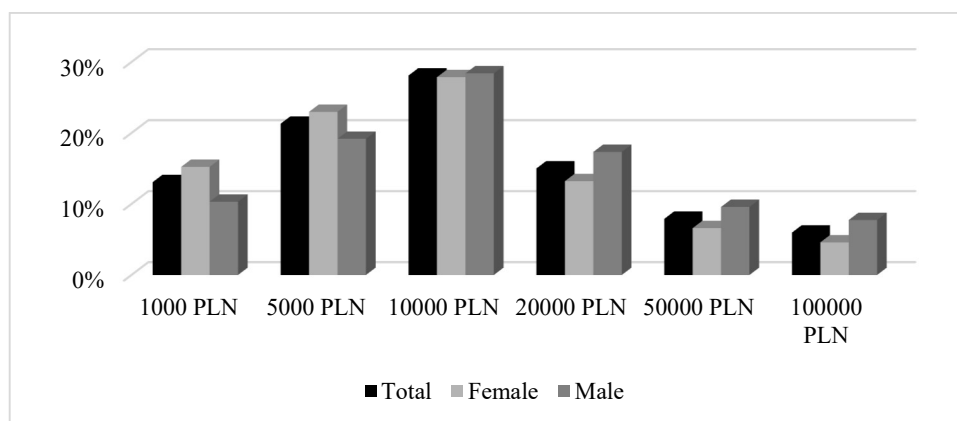


Figure 6. The maximum limit for payments regulated in local currency suggested by respondents

Source: Study based on own research.

Over 91% of survey participants (90.52% of women and 92.62% of men) believed that the amount of payments regulated in local currency should be limited from above. This opinion was most often expressed by residents of cities with 25–50 thousand inhabitants (93.16%), respondents with income below 2,000 PLN (94.05%), and respondents with higher education (92.35%).

More than 13% of respondents believed that the limit for payments using the local currency should be set at 1,000 PLN, 21.32% of respondents indicated the amount of 5,000 PLN and 28.11% of respondents believed that this amount could be a maximum 10,000 PLN (Figure 6). The highest local currency payment limits were indicated by

15.02% of the respondents in the amount of the 20,000 PLN, 7.92% of respondents in the amount of the 50,000 PLN, and 5.98% of respondents in the amount of 100,000 PLN. It should be emphasised that payment limits from 10,000 PLN and above were indicated more often by men (63.09%) than women (52.3%). Payment limits of 10,000 PLN and above were most often accepted by respondents living in cities with more than 100,000 inhabitants (65.46%), with income per family member greater than 4,000 PLN (82.35%), and with higher education (71.04%).

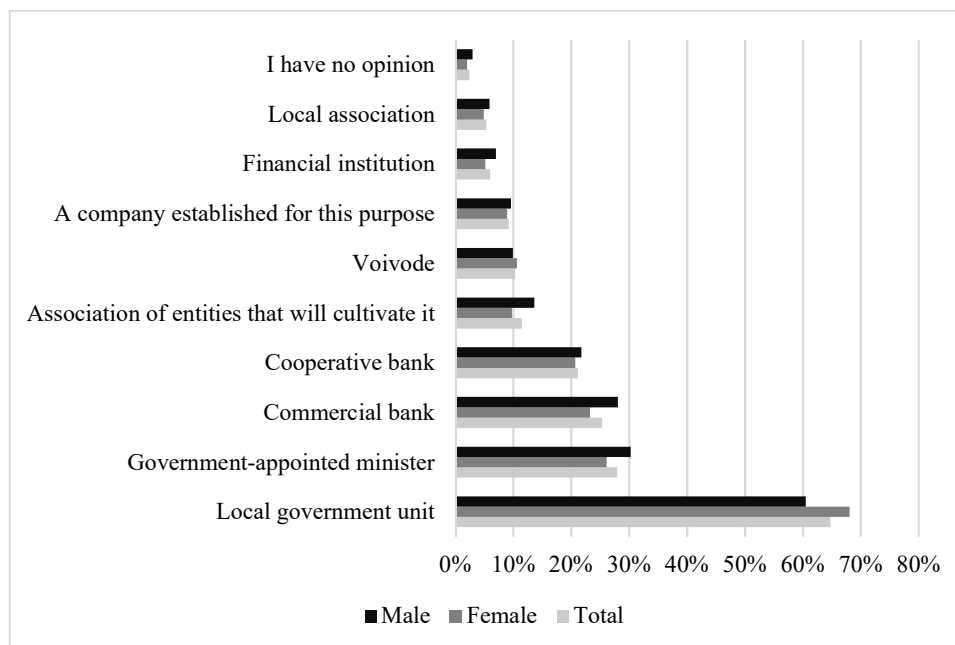


Figure 7. Entities that, according to respondents, may be issuers of local currency

Source: Study based on own research.

Later in the study, respondents were asked to indicate entities that, in their opinion, may be issuers of the local currency (Figure 7).

The study participants believed that the issuers of local currency can be entities with a high level of social trust that can guarantee maintaining the purchasing power of the local currency, i.e., local government units (64.78%), a minister appointed by the government (27.95%) or a voivode (10.34%). Every fourth respondent pointed to a commercial bank and every fifth to a cooperative bank. More than 11% of the respondents believed that the issuer of the local currency should be an association of entities that will honour payments made with it in the future. 9.21% of the respondents expressed the opinion that a special company should be established for such a problem.

It should be emphasised that the study participants, if they could indicate only one entity that, in their opinion, could be the issuer of the local currency, most often indicated: a local government unit (25.36%), a minister appointed by the government, e.g., the Minister of Finance (18.42%), commercial bank (15.02%) and the association of entities that will accept such currency (11.47%).

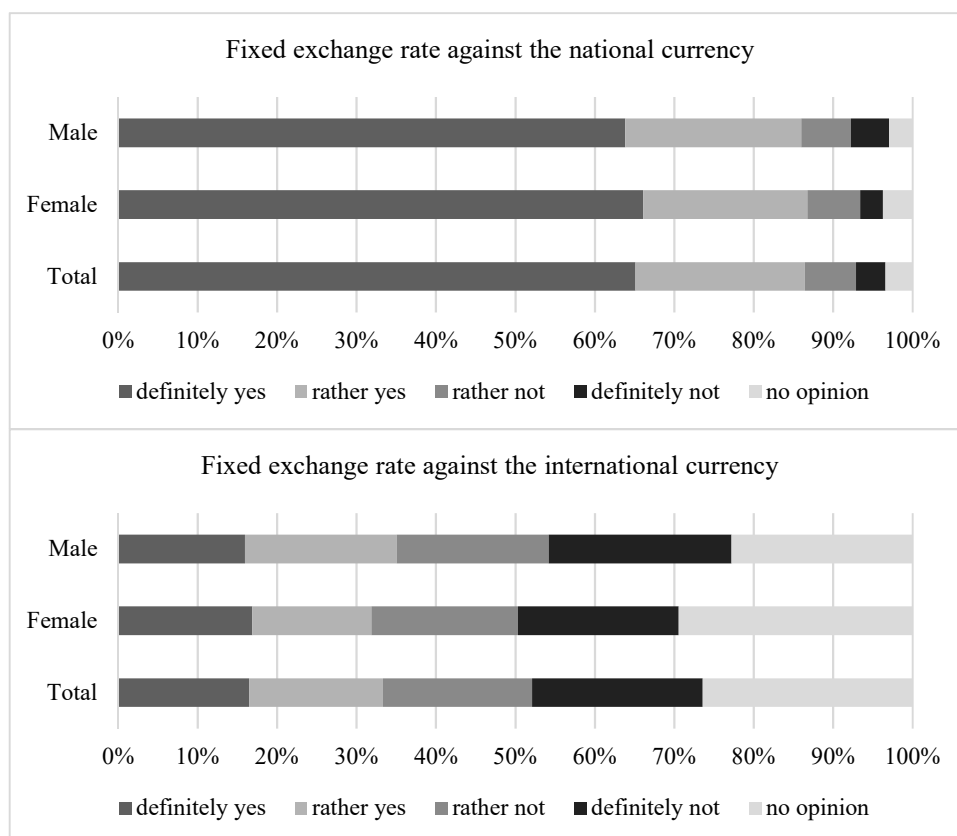


Figure 8. Linking the local currency exchange rate to the national currency and the international currency

Source: Study based on own research.

Local currencies are usually not backed by precious metals. They are a form of "fiat money", i.e. a means of payment based on trust. To strengthen the level of trust in this currency among people who can make payments using it, its exchange rate should be rigidly linked to the currency of a country or an international currency.

The vast majority of study participants (86.43% – 86.78% of women and 85.98% of men) believed that the local currency exchange rate should be rigidly linked to the national currency (Figure 8). This opinion was most often expressed by respondents living in cities with 26–50 thousand inhabitants (88.03%), respondents with income per family member above 4,000 PLN (89.41%) and respondents with secondary education (88.07%).

However, only 33.93% of the respondents (34.2% of women and 33.58% of men) indicated the need to link the local currency exchange rate with the international currency exchange rate. This opinion was most often expressed by residents of cities with over 100,000 inhabitants (41%), respondents with an income per family member above 4,000 PLN (37.64%) and respondents with secondary education (34.61%). It should be noted here that 39.58% of the respondents (38.79% of women and 40.59% of men) stated that there was no such need. Most often, respondents living in rural areas (48.39%),

respondents with income per family member below 2,000 PLN (41.62%), and respondents with secondary education (41.77%) indicated the lack of need to link the local currency exchange rate with the international currency exchange rate.

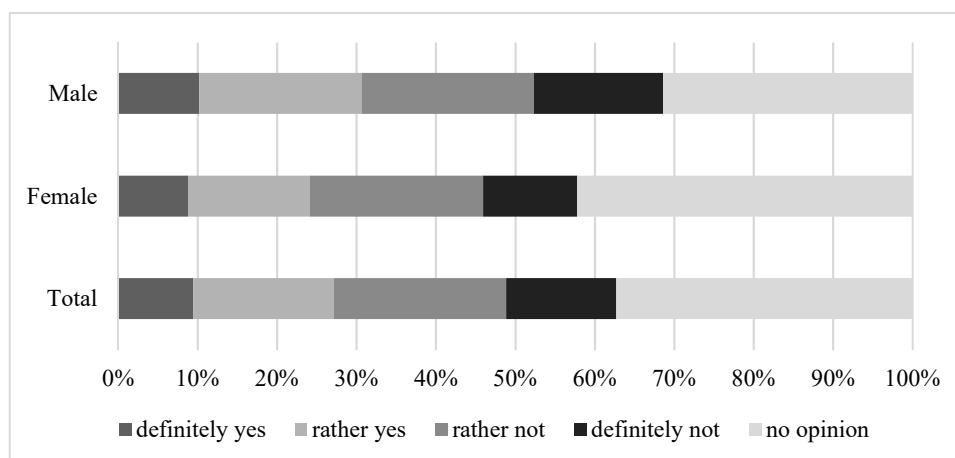


Figure 9. Willingness to pay using local currency.

Source: Study based on own research

The success of introducing a local currency into circulation is directly influenced by how large a group of potential users trusts this form of payment and expresses their willingness to systematically use it to make payments. The analysis of the obtained research results (Figure 9) allowed us to conclude that only 27.94% of the respondents (26.15% of women and 30.26% of men) declared their willingness to use the local currency (if possible) to make payments. Most respondents who declared their readiness to use the local currency lived in cities with over 100,000 inhabitants (32.38%), had income per family member ranging from 2,001 PLN to 3,000 PLN (35.3%) and had secondary education. price (29.59%). It should be noted here that among the study participants, more respondents declared their reluctance to use such a means of payment (37.96% – 35.92% of women and 40.59% of men). The largest groups of people reluctant to use such a means of payment were among the inhabitants of cities with 26-50 thousand inhabitants (44.44%), respondents with an income per family member in the range of 3,001-4,000 PLN (45.06%), respondents with higher education (40.44%).

The success of issuing a local currency will also depend on how many business entities are willing to accept payment using such means of payment. During the study, respondents will answer the question in which places it should be possible to make payments using local currency (Figure 10). Almost 80% of the respondents (78.16% of women and 80.81% of men) believed that the possibility of making such payments should be provided in bars and restaurants. Over 67% of respondents believed that such payments should be made possible by hotels and almost 65% of respondents indicated museums (64.94%). More than half of the survey participants believed that payments using local currency should be possible in stores (59.61% – 56.9% of women and 58.1% of men) and in service entities (52.99% – 48,56% of women, and 58.67% of men). It should be noted that only 17.93%

(15.23% of the women and 21.4% of men) of research participants allowed the possibility of paying official fees using such currency.

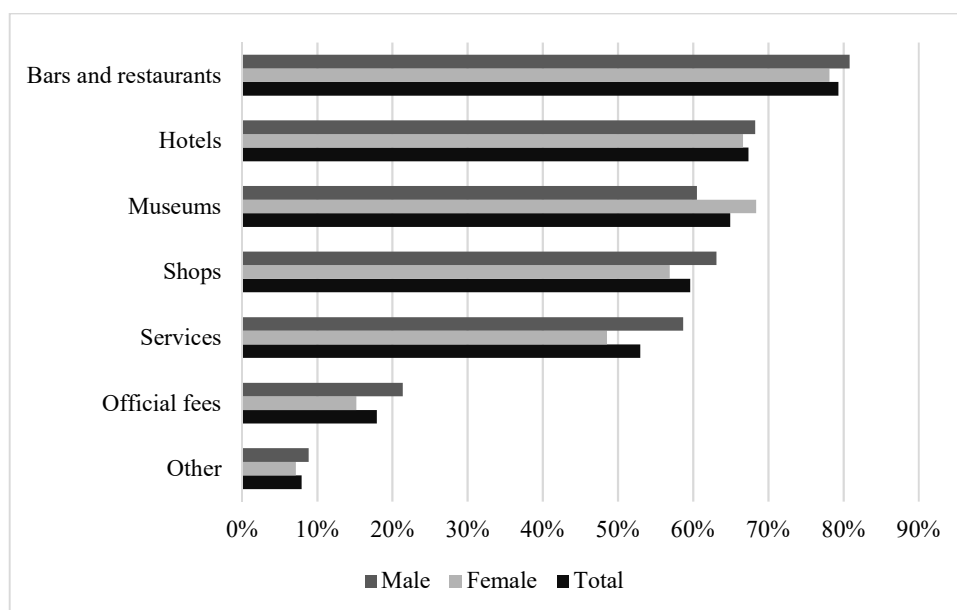


Figure 10. Places where it should be possible to make payments using local currency

Source: Study based on own research.

5. CONCLUSIONS

Local currencies have been issued for centuries by various local rulers. The turning point for modern local currencies was the issuance of the local currency Wörgler Schilling in 1932–1933 by the Austrian town of Wörgl. Issued then in the form of banknotes, the so-called Labour vouchers were to be one of the tools to overcome the economic crisis on the local market. The success of this economic experiment has for years been an encouragement for local communities around the world, which, by issuing local currency, are looking for a way to stimulate local entrepreneurship, increase the use of local production opportunities, and reduce the level of unemployment (Sołtysiak, 2021).

It should be noted that although new issues of local currencies are carried out every year in various regions of the world, only a small percentage of them have a chance of success, i.e., remaining in economic circulation for several years. The success of these activities depends on the level of knowledge about the functioning of such a currency among representatives of local communities and the willingness to use the complementary currency to make payments both by local entrepreneurs and their customers. Therefore, it is extremely important to conduct research on this topic before taking actions related to the issuance of local currency. Such research will not only answer questions about the state of public awareness of the functioning of the local currency but will also indicate areas in which educational activities should focus at the preparatory stage for the issuance.

The research conducted allowed us to conclude that issues related to the functioning of the local currency are minimally known among Polish representatives of Generation Y.

Only every sixth respondent stated that they knew the concept of local currency, and every eleventh respondent declared that they knew some local currency in economic circulation. It is also worth highlighting that only 1.45% of respondents stated that they made payments in local currency.

More than 46% of the respondents expressed the opinion that there is no need to introduce an additional complementary currency in their place of residence, and only 3.07% of the respondents believed that it should definitely be introduced.

Representatives of Generation Y participating in the research approached the functioning of the local currency with great caution. They attach great importance to what institution could issue such a currency. Almost 65% of the respondents indicated that the issuer of the local currency should be a local government unit, and approximately 28% of the respondents believed that the issuer should be a minister appointed by the government. This allows us to conclude that the study participants expected the issuer to be a public trust institution.

Another very important issue for the respondents was the form in which it would be possible to make payments in local currency. More than 39% of the respondents believed that the local currency should be issued only in cash, 30.53% allowed the possibility of making payments in cash and electronic form, and 23.42% believed that payments should be made only in electronic form. More than 91% of the respondents were of the opinion that the maximum amount of payments using local currency should be established; 62.52% of respondents believed that this amount should not be higher than 10,000 PLN.

It should be noted that among Polish representatives of Generation Y, despite a very low level of knowledge about the functioning of local currencies, there are almost 28% of respondents who declared their willingness to make payments in such a currency. Furthermore, taking into account the fact that more than 34% of the respondents do not have an opinion on the use of the local currency, this creates the possibility that the implementation of a large-scale information and educational campaign may have a significant impact on the development of complementary currencies in Poland.

In summary, it should be noted that the research results presented in the article provide important and current knowledge that may be useful primarily for local initiative groups and local government officials looking for alternative tools to stimulate the local economy. This also justifies the need to continue similar research and analyses.

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BUILDING ENVIRONMENTAL AWARENESS AMONG STUDENTS IN POLAND – CASE STUDY WROCLAW UNIVERSITY OF SCIENCE AND TECHNOLOGY

Climate change is one of the most important challenges facing our community today. Among its various sources, irresponsible human activity, including excessive consumption, plays a significant role. As a society, we compensate for periods of deprivation with increased consumption of many goods without regard for environmental effects. In this context, environmental consciousness, especially among young people forming their habits and attitudes, becomes extremely important. Generation Z, current university students, has demonstrated a notable increase in environmentally conscious actions and attitudes. The purpose of the article is to assess the state of environmental awareness and knowledge among Generation Z and to identify the activities of universities in building environmental awareness among students at Wrocław University of Science and Technology (WUST). The article analyzes research conducted in Poland on environmental awareness and behavior among different groups of respondents. These findings were juxtaposed with the expectations of environmental education in Poland, noting that there is a lack of content related to environmental education and building environmental awareness in the study programs, which is due to the lack of a holistic approach to the entire process of environmental education. The article presents pro-environmental activities in the example of WUST. These activities mostly focus on the transfer of knowledge and somewhat less on motivating students to action. There is a lack of activities that build emotional involvement, which is crucial in developing environmental awareness. In addition, there is little involvement in social issues.

Keywords: environmental knowledge, environmental education, Generation Z, environmental behaviour, pro-environmental activities.

1. INTRODUCTION

Climate change, as one of the most important problems surrounding the world, is a global problem, affecting many regions, which in the short term may become the most important factor affecting the further history of the world. One of the causes that should be highlighted is man's irresponsible economy, including our irrational lifestyle and consumerism, which is particularly evident in post-socialist countries such as Poland. Since, in the context of society as a whole, it is easier to build proper awareness than to change it, hence the importance of building environmental awareness among young people, who are just forming their habits, behaviour and general attitude to the world.

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Low levels of environmental awareness and excessive human interference with the environment can lead to unexpected consequences for both nature and people. First of all, a damaged environment has a negative impact on human health. Human distancing from nature and overexploitation of its resources leads to an increase in the number of diseases known as civilization diseases. Interestingly, these diseases are developing as a result of the progress and development of civilization on a global scale, and are mainly found in highly industrialized countries (Tuszyńska, 2014).

The concept of environmental awareness itself is nothing new, having appeared in Poland in the 1980s under the name “eco-development” (Papuziński, 2000). On the other hand, the first studies on environmental awareness were conducted in Poland in 1983, these are the so-called Tarnobrzeg studies (Burger, 1984). They were followed by another study, conducted by Poskrobko in 1987 (Poskrobko, 1987) on the sources of environmental risks among specific employee groups. The most extensive research on the degree of environmental awareness among Poles was conducted by the Institute for Sustainable Development, in cooperation with CBOS, in 1992–2012 (Strumińska-Kutra, 2012). Conclusions of the research are discussed in (Kłos, 2015). Pro-environmental organizations and associations, which were established even before the year 2000, as well as numerous educational programs conducted in municipalities and the introduction of relevant content to educational programs in schools, have mainly contributed to the development of environmental awareness among Poles (Patrzalek, 2017). There is now wide access to knowledge, which is supplemented by education in schools, as confirmed by the results of a study conducted by the Ministry of Climate and Environment in 2022 (Grupa Badawcza DSC, 2022).

Despite the increasing level of environmental education among young people, as well as society as a whole, the results of surveys of the level of environmental awareness and pro-environmental behaviour (Grupa Badawcza DSC, 2022; Parzonko et al., 2021) show that they are at a low level. Which suggests that the activities undertaken so far in building environmental awareness among young people are insufficient.

Most researchers agree that some pro-environmental behaviour can be directly linked to ecological knowledge and environmental awareness. It is known that the longer someone is educated on environmental issues, the more extensive his or her knowledge and awareness, but this does not necessarily translate into increased pro-environmental behaviour. This raises the question of what other factors (besides knowledge) can influence increased pro-environmental behaviour? Kollmuss and Agyeman (Kollmuss, Agyeman, 2002) noted that other incentives, such as economic benefits or cultural values, can motivate people to engage in environmental activities without necessarily being driven by environmental concerns. In their work, they showed that environmental knowledge is a subcategory of environmental awareness and emotional involvement is what shapes environmental awareness and attitude. On the other hand, Chawla (1998) states that environmental consciousness is not built through single experiences but through a combination of various factors, such as (1) childhood experiences in contact with nature, (2) experiences of environmental destruction, (3) pro-environmental values conveyed by the family, (4) pro-environmental organizations, (5) role models (friends or teachers), (6) education. Summarizing the above considerations, one concludes that building environmental awareness should be based on knowledge, experience and emotional involvement.

In addition, environmental education should enter every level of education, from kindergarten, where the formation of awareness should begin, to university. Parzonko et al.

(Parzonko et al., 2021) points out that it is important to form appropriate pro-environmental behaviours, including the inclusion of relevant content in school curricula at every level of education, which will influence the formation of an environmentally friendly attitude from an early age. Rodzoś (2022) stresses that it is not enough to change the educational curricula alone, but rather a thorough modernization of them is needed so that there is much more practice than theory, so that a problem-based approach dominates over a descriptive one, so that there is openness to different cognitive perspectives and to engaging in social issues. In addition, it was noted that the curricula lack content related to environmental education, environmental awareness and stimulation of pro-environmental behaviour, and this is the last stage of education, that is, the last chance to create pro-environmental attitudes and habits.

The question then arises, what are universities doing that is at the end of the whole education process? Certainly, universities feel responsible for the environmental education of young people, for building the environmental awareness of society and creating pro-environmental behaviour. However, it is interesting what activities they undertake for this purpose.

Thus, the purpose of this article is, firstly, to assess the state of environmental awareness and knowledge of young people of Generation Z, which currently constitutes the student multitude, secondly, to assess the level of environmental education in education, and thirdly, to identify the activities of universities in building environmental awareness of students on the example of Wrocław University of Science and Technology. The research methods used are analysis of the literature on the subject, analysis of public opinion polls, own survey research, analysis of the activities of the research subject.

The article was planned as follows: firstly, the definition of environmental awareness will be introduced, then the research conducted in Poland for the last twenty years will be discussed along with the resulting conclusions and trends, including the study conducted by the author. Next, the issue of environmental education will be discussed and then the activities carried out at the university will be described and critiqued, using the example of Wrocław University of Technology.

2. ENVIRONMENTAL AWARENESS

Earlier definitions of environmental awareness emphasize the importance of human concern for the future of the environment and the desire to mitigate the negative effects of human activities. In this group, the following definitions deserve emphasis, according to which environmental awareness:

- a) is the result of the recognition of an environmental problem as a social problem and involves the public's recognition of the degradation of environmental living conditions as consequences of social behaviour (Papuziński, 2006);
- b) can have different contexts for specific social communities and is related to the importance of the environment in the value system of these groups, as well as their knowledge of the dangers of its degradation (Wódz, 1993);
- c) is a person's attitude to the natural environment, a set of information and beliefs about it, as well as the system of values that this person is guided towards it in his behaviour (Kielczewski, 2001);
- d) is a certain state of knowledge, views and perceptions of people regarding the importance of the environment in human life, as well as the state of knowledge about the ways of its use and protection (Górka et al., 2001).

The second group of definitions emphasizes the link between environmental consciousness and social awareness and social norms and values. As early as 2001, Górka et al. noted that we can consider environmental consciousness in a narrower and broader sense. The broader meaning of ecological awareness includes a set of functionally interrelated social norms and values concerning humans and social groups, as well as the place in it of values and opinions about the natural environment (Górka et al., 2001). Environmental consciousness is seen as a set of views, ideas and beliefs, a certain system of values that is widely accepted in a community and which becomes a model or pattern of thinking instilled in its members and enforced by social pressure (Dziamski, Nowosielski, 2013; Sztompka, 2012), which is reflected in the experiences and thinking of individual people (Frątczak, 1995). It is a kind of socialization process in which each of us participates throughout our conscious life. Consciousness is a subjective phenomenon involving the complement of the ecological knowledge and imagination of individual individuals, it is the result of one's own thoughts, sensations, experiences and ability to transform the acquired ecological knowledge into the norms of everyday life (Sobczyk, 2000).

Since environmental awareness is formed over time it can be considered as a kind of process, which includes certain stages related to the formation of sensitivity and the level of perceptiveness of the environment on a certain scale of the dichotomy of degraded and non-degraded environment. Subsequent stages include widespread interest in environmental problems and end with complete adherence to pro-environmental behavioural norms (Górka et al., 2001; Patrzalek, 2017).

Kollmuss and Agyeman (Kollmuss, Agyeman, 2002), on the other hand, emphasize that the formation of environmental awareness is heavily influenced by cognitive and emotional limitations. Cognitive limitations include (1) the non-media nature of many environmental problems, which arise and deteriorate in ways that are not very tangible, (2) the slow and gradual nature of ecological destruction, and (3) the complex nature of environmental problems, which negatively affects an individual's ability to understand processes and, consequently, his or her willingness to take action to protect the environment. Emotional involvement is defined as the degree to which we have an emotional connection to the natural world. The work of Chawla (Chawla, 1998) shows that such an emotional connection seems to be very important in shaping our beliefs, values and attitudes toward the environment. In other words, it is an individual's emotional involvement in an issue. Kollmuss and Agyeman (Kollmuss, Agyeman, 2002) verified hypothesis that the stronger a person's emotional response, the more likely they are to engage in pro-environmental behaviour. They view environmental knowledge, values and attitudes, along with emotional commitment, as a complex of factors referred to as environmental awareness (pro-environmental consciousness). This complex set is, in turn, embedded in personal values and shaped by personality traits and other internal and external factors.

3. SELECTED RESEARCH RESULTS ON ENVIRONMENTAL AWARENESS

This section analyses selected studies on environmental awareness, environmental knowledge and pro-environmental behaviour of Polish society. In addition to the Survey of Environmental Awareness and Behaviours of Polish Residents conducted annually since 2012 on behalf of the Ministry of Climate and Environment (Grupa Badawcza DSC, 2022) and the survey "Ecological Awareness of Poles" conducted by CBOS since 2008 (Omyła-Rudzka, 2020) on the whole society, analysed were the report Students towards Climate

Change (Guzy, Ochwat, 2022) where respondents were aged 9–20 years, research on Pro-Environmental Behaviours of Generation Z (Parzonko et al., 2021) and research on Ecological awareness in urban and rural communities (Chodkowska-Miszczuk et al., 2023). In selecting the study, it was crucial that the respondents include representatives of Generation Z. Generation Z are young adults born between 1995 and 2010 who are currently still in high school, studying and entering the job market. Generation Z makes up about 32% of the world's population, making them likely to have a significant impact on both global consumer sales and environmental behaviour, as they are likely to face the greatest environmental challenges in the future.

3.1. The survey of environmental awareness and behaviours of Polish residents

“Survey of environmental awareness and behaviour of Polish residents” has been conducted since 2011 previously commissioned by the Ministry of Environment and then for the Ministry of Climate and Environment (Grupa Badawcza DSC, 2022). The survey in November 2022 covered 1,000 Polish residents constituting a representative sample.

The survey shows that climate change is important to a growing number of respondents, with 91% of respondents in 2022. The least interested in the issue of climate change are those in the 35 plus age bracket and the most interested are those in the 15–24 age bracket. According to respondents, activities to minimize the adverse effects of climate change should be undertaken by each of us (60% of indications), central government (53%), international institutions (21%) and local authorities (19%). Taking into account the age of the respondents, it can be noted that the youngest respondents (up to 34 years old) are more likely than older respondents to believe that entrepreneurs and political parties are responsible for minimizing the adverse effects of climate change. Half of Poland's residents believe that their country should start reducing greenhouse gas emissions as soon as possible. Overall, 83% of Polish residents were in favour of reducing gases, regardless of the timing. A slight increase in pro-environmental attitudes can be observed from 2020, including reducing water consumption, not wasting food in one's home, taking additional activities to increase energy efficiency (Grupa Badawcza DSC, 2022; PBS sp. z o.o., BR sp. z o.o., 2020).

Respondents believe that the state of the environment depends primarily on everyone's activity (62%), on good legislation (36%) and on our society's recognition of the environment as an important issue (33%). The most important source of information about the environment is the Internet (74%) and television (52%). The two main reasons in 2022 for protecting the environment are concern for future generations (70%) and concern for human health (62%). According to respondents, everyone is responsible for shaping environmental attitudes and behaviours individually (44%), but school (38%), central authorities (31%), family (31%) and local authorities (22%) should also play a big role. Compared to 2020, there has been a significant increase in the percentage of respondents who say that it is up to each individual to shape environmental attitudes and behaviours (up 12%) (Grupa Badawcza DSC, 2022; PBS sp. z o.o., BR sp. z o.o., 2020).

The Ministry's data (Grupa Badawcza DSC, 2022) show a systematic increase in the level of appropriate social activities and attitudes and thus environmental awareness among the society, which is mainly due to an increase in awareness among adults and educated people, who owe it to self-education, as they know that they are mainly responsible for it.

3.2. Ecological awareness of Poles

The survey, entitled “Poles' ecological awareness”, has been conducted since 2008 by CBOS. The survey covers adult residents of Poland, who constitute a representative named sample drawn from the PESEL register. The latest survey (Omyła-Rudzka, 2020) was conducted in September-October 2020 on a sample of 1133 respondents.

The survey shows that concerns about the state of the environment are declared by a significant proportion of Poles, however, they are more often on a global scale (70% of respondents) than on a national (53%) or local (25%). The vast majority of respondents believe that their own behaviour, the way they live, translates significantly into the environmental condition (81%). This view has prevailed since 2009, however, this value has not changed since 2016. The perception of influence on the state of the environment among respondents aged 55 and over is significantly lower than among younger respondents (aged 18-34), who declare it at 88-89%. Better-educated respondents are more likely to believe that their personal activities translate into the condition of the environment (62% of respondents with primary/lower secondary education and 93% with higher education think so) (Omyła-Rudzka, 2020; Wądołowska, 2011).

Since 2008, there has been a systematic increase in environmental activities undertaken by ordinary people, such as segregating waste (95% in 2020), using energy-efficient household appliances (92%), using reusable bags (91%), giving up driving a car (47%), totally voluntarily picking up trash encountered in a forest, meadow, or by a river (47%), or avoiding buying environmentally harmful products (78%) (Omyła-Rudzka, 2020; Wądołowska, 2011).

Overall, the survey shows that the environmental awareness of respondents is relatively low. The source of knowledge about ecological problems and environmental protection is most often the media (95% of indications); among them, news programs and daily newspapers, as well as opinion magazines, less often specialized magazines. Younger respondents indicated school and subjects related to biology and geography in addition to the media (Omyła-Rudzka, 2020; Patrzalek, 2017).

3.3. Pro-environmental behaviours of Generation Z

The survey on pro-environmental behaviours of Generation Z was conducted in October and November 2020. A total of 449 questionnaires were received and reviewed for completeness, of which 15 incomplete or incorrectly completed questionnaires were rejected (Parzonko et al., 2021). This is particularly valuable research, as Generation Z has not previously been considered as a distinct demographic group in previous studies of pro-environmental behaviour.

Studies have shown that representatives of Generation Z are less engaged in pro-environmental behaviour than those described as “Working Adults”. Respondents belonging to the Baby Boomer generation, Generation X and Generation Y, were referred to as Working Adults due to the small sample size. The respondents from Generation Z, to a slightly greater extent than the respondents from the Working Adults, indicated that they would rather choose public transport than a car and turn off the lights when they leave a room. Working Adults respondents, on the other hand, are significantly more likely than Generation Z respondents to exhibit pro-environmental behaviours such as minimizing the use of processed foods and prepared meals, sorting waste, composting organic waste, conserving water and electricity at home, and abandoning paper invoices in favor of electronic ones. Surprisingly, the actual pro-environmental behaviour of Generation Z is not in line with their declarations (Parzonko et al., 2021).

The research showed that 80% of Generation Z respondents get their environmental information exclusively from social media. On the other hand, a rather surprising finding from the survey was that concern for the environment and commitment to pro-environmental behaviour are greater in older generations than in Generation Z.

The authors (Parzonko et al., 2021) speculate that the differences between the pro-environmental declarations and behaviours of Generation Z may be due to the fact that their declarations are largely shaped by social media, a social factor. The economic factor has less influence, perhaps because, first of all, they usually live with their parents and do not run their own household. Secondly, due to the intensive development of information technology, this is a generation that, unlike previous ones, is no different from their peers in developed countries. Therefore, shaping appropriate pro-environmental behaviour requires the activities of international organizations and the cooperation of national governments in this field.

The use of the media in the broadest sense, and social media in particular, to disseminate information about the dangers of negative human impact on the environment can help change the individual and collective behaviour of this generation.

3.4. Students towards climate change

The survey, titled: "Students towards climate change", was conducted by the Center for Research on Humanistic Education at the University of Silesia in November and December 2021 (Guzy, Ochwat, 2022). The research sample consisted of 2181 students aged 9–20, mainly from the Silesian Voivodeship (96.7%). 1,227 fully completed questionnaires were analyzed in detail. The largest group of respondents (almost 72%) was in the 15–18 age range, making the average age of respondents 15.5 years. This is particularly valuable research because it focuses on Generation Z, which accounted for 97.3% of respondents.

The survey emerges a not very optimistic picture of young people's knowledge and attitudes toward climate change. Yes, 86.4% of respondents believe that humans are responsible for climate change, but only 63.2% agree that it is human activity that causes climate change and only 64.7% believe that society has an impact on climate policy, and for less than 70% of students climate change topics are important. Fear for the future related to the climate crisis is felt by only 56.5% of the young respondents surveyed and less than 70% believe that through various activities the climate catastrophe can be stopped (Guzy, Ochwat, 2022).

One of the most disturbing findings of the survey is how low the involvement of young people (about 17%) in activities and actions related to education for the climate is. The low percentage of people reaching for books (8.2%) or films (31.7%) related to climate change is not surprising, as young people reach for a variety of sources of information from the immediate environment to the world closest to them: social media, television, influencers (Guzy, Ochwat, 2022).

According to the students, knowledge about climate change should be provided by: mainly teachers and ecologists, as well as parents, politicians, non-governmental organizations. Students also emphasize that they also seek relevant knowledge on their own. In addition, students also point to other sources of knowledge, such as: social networks and websites, media (press, television), scientists (Guzy, Ochwat, 2022).

3.5. Ecological awareness in urban and rural communities

The survey on ecological awareness in urban and rural communities was carried out in the spring of 2019 on the streets of the city and commune (Chodkowska-Miszczyk et al.,

2023). A total of 728 questionnaires were collected in two communes (urban and rural), which are located in the same voivodeship. After detailed verification of the questionnaires and removal of incomplete sheets, 710 questionnaires were obtained (475 in urban and 235 in rural).

The authors focused on the issue of energy awareness, which, according to some researchers (e.g., Dyląg (2014)), is seen as a key element of environmental awareness. The survey found that more than 80% of respondents are aware of their personal impact on the environment, considered mainly through the view of energy consumption. A significant proportion of respondents say they use electricity and heat rationally. Respondents pointed to RES as the best solution in terms of energy security. Of the city's residents surveyed, 65.8% showed medium or high interest in RES issues, compared to 34.2% with no interest at all. Awareness of RES is declared by more than 60.6% of respondents in urban areas and more than 91% of respondents in rural areas. Regardless of whether we are dealing with an urban or rural community, younger people from Generation Z and Y are definitely more familiar with the topic of RES, moreover, they recognize the need for pro-environmental changes (Chodkowska-Miszczuk et al., 2023).

The primary sources of knowledge about RES, regardless of where respondents are located, are the Internet and television. Additionally, in rural areas, the leading sources of data are family and friends. This is related to the traditional social resources identified in rural areas, which are based on family and neighborhood ties and trust in the closest people (Chodkowska-Miszczuk et al., 2023).

Respondents indicate that the advantages of using RES are both environmental and economic, citing environmental friendliness as the most important factor. Also of great importance is the economic aspect, i.e. the inexhaustibility of RES and the possibility to become independent of electricity suppliers and fuel imports (Chodkowska-Miszczuk et al., 2023).

4. THE ROLE OF ENVIRONMENTAL EDUCATION IN SHAPING ENVIRONMENTAL AWARENESS

A well-developed environmental consciousness in a community guarantees the pro-environmental development of a country, the level of which is determined by many factors, including, above all, environmental education. Therefore, the role of environmental education in shaping environmental awareness has received the most attention in scientific research (Chawla, 1998; Chodkowska-Miszczuk et al., 2023). The purpose of environmental education is to make Poles aware that the quality of life depends on the state of the environment in which we live.

From the research presented in the previous chapter, a picture emerges of a society whose ecological knowledge is at a relatively low level; although the entry into force of the amendment to the Law on Maintaining Cleanliness in Municipalities (Tuszyńska, 2014) had a positive impact on the public's attitude to the environment, the level is still low. Surveys show that environmental problems are treated secondarily, and the environment is treated in Polish society as a recognized – declared value (Patrzalek, 2017). Also unsatisfactory are the results regarding our students' awareness of climate change, and activities to explore this problem are practically not undertaken by them (Guzy, Ochwat, 2022). A positive aspect from the survey, is that the majority of respondents understood that caring for the environment is the responsibility of each individual (Dyląg, 2014; Omyła-Rudzka, 2020), but a disturbing conclusion is that universal education has very little

impact on students' activities, and the authority of the school and the knowledge it imparts are increasingly replaced by information obtained from the media and news programs.

4.1. Quality of environmental education at schools

In the study (Guzy, Ochwat, 2022), students evaluated the quality of education for climate conducted in schools. The survey shows that only 13.9% of students are satisfied with the quality of climate education at their school, and more than half of the respondents have the opposite opinion (59%). Analysis of the statements obtained shows that a variety of activities related to environmental issues are offered at schools, but only 26% of the respondents are of this opinion. In the statements of the students, it can be noted that the most frequent pro-environmental activities were offered to them in elementary school. Students repeatedly emphasized that activities and actions are more often of a one-time nature, although there are also cyclical activities proposed, such as participation in hobby clubs. Only 37.7% of students indicate that climate change issues are addressed in lessons.

These results are consistent with those in (Ropuszyńska-Surma, Weglarz, 2017), where 175 students from Wrocław universities were surveyed. Students were asked at which level of education, from kindergarten to college, content related to environmental education appeared. They had the most such content when they were elementary school students in grades 1–3, grades 4–6 and lower secondary school, it was 56%, 71% and 64.6% respectively. Less than 39% had some ecological lectures at higher secondary school. The lowest level of environmental education is at universities, only 13% of the students had any ecological courses (Ropuszyńska-Surma, Weglarz, 2017).

Students indicate that the most common forms of environmental education at school are: traditional lectures, ecological competitions, participation in eco-programs, talks with specialists, case study visits, other activities e.g. cleaning the world (Guzy, Ochwat, 2022; Rodzoś, 2022; Ropuszyńska-Surma, Weglarz, 2017).

Students definitely rank better lessons that allow them to engage in discussion, explain the content taught in depth, are more practical (joint actions such as cleaning up the planet, outdoor activities, Oxford debates), are taught by professionals (experts and people educated in the field), and are taught with passion, which will influence motivation for active participation (Guzy, Ochwat, 2022). They give a much lower rating to lessons where teachers use only giving methods. Students also suggest that education for the climate should take place as part of systemic education in lessons of various subjects. Young people also suggest more real activities in non-school spaces (e.g., cleaning up, sorting garbage together, planting trees), watching films on environmental issues, conversations, debates in favor of fewer facts and data.

4.2. System of environmental education at schools

Discussing school climate education, it should be remembered that in the 1990s, environmental education was introduced into Polish schools, first as part of the natural sciences, and then as a formally separate inter-subject pathway with assigned content. This solution did not bring the expected results, and on the occasion of one of the school reforms the pathway was abolished (Rodzoś, 2022). The school is still obliged to form pro-environmental attitudes, but it does so not very effectively. In order for environmental education to make sense, it is necessary to give the student a chance to use the knowledge gained in practice, and above all to apply it in everyday life.

According to Dr. Jolanta Rodzoś of the Maria Curie-Skłodowska University (2022), an inadequate education system is responsible for the poor level of students' environmental

awareness. The affliction of the Polish education system is the over-theorizing of education and the focus on certain, unquestionable knowledge that is safe for the teacher and the student. Frequent changes in the education system have meant that there is no longer enough desire, time and energy for deeper modification of content, for investing in the development of teachers' knowledge and competence. The second unfavorable feature of the Polish school is an unwillingness to shape attitudes and, in fact, treating this task as a completely side thread. This may be related to the changeability of the philosophy of education depending on the ruling option, which intensifies the caution in the implementation of socially and politically sensitive content (Rodzoś, 2022). And yet it is the duty of teachers to be socially engaged in environmental protection and to shape environmental competence among their students. The teaching profession is the most predestined to assume the function of ecological leadership and shape the social responsibility of students, parents and residents of local communities (Tuszyńska, 2014).

Polish school unfortunately lacks complete and up-to-date knowledge of the environmental and climate situation globally and in our country. According to Prof. Piotr Skubala (Guzy, Ochwat, 2022), in the current core curriculum in Poland, information on climate change and protection is mostly scattered, selective, does not show the complexity of the problem, and only a few selected topics related to climate change are only in the extended curricula of some subjects.

Education is essential to prepare society to deal with the climate crisis. Environmental education should be integrated at all levels of education and in all educational disciplines. It is worthwhile for it to focus equally on the “head”, “heart” and “hands” of students. And as students draw their diverse inspirations from many sources, it shows how many channels can be used to convey information related to climate responsibility.

The decreased role of school in environmental education is due to systemic deficits. The environmental education system now needs to be strengthened and more attention paid to using practical, professional knowledge and promoting more active forms that engage youth. Only through holistic curricula can students be provided with knowledge, green competence, hope and commitment. This education should already be incorporated into university education, including in the professional training of teachers in all subjects and at all levels of education.

4.3. Environmental education at universities

Surveys conducted among students from Wrocław universities (Ropuszyńska-Surma, Węglarz, 2017), found that only 25% of students had any courses related to environmental education in college, with the percentage even lower for non-engineering studies (just 6%). In engineering studies, various specialized courses related to environmental education or climate change are included in the curriculum. Included in the engineering curriculum are various specialized courses related to environmental education or climate change. These courses are mainly offered in fields of study such as environmental conservation, environmental engineering or sanitary engineering. In other in fields of study, these courses appear in the curriculum sporadically.

This is due to the fact that the current national guidelines for the development of study programs (The Regulation of the Minister of Science and Higher Education of November 14, 2018 on the Characteristics of the Second Level of Learning Outcomes for Qualifications at Levels 6–8 of the Polish Qualification Framework, 2018) do not explicitly include provisions on ecological knowledge, building ecological awareness or creating pro-environmental attitudes and behaviours. The Polish Qualification Framework (PQF),

like the European Qualification Framework (EQF), distinguishes eight levels of qualification, with level 6 for first-cycle studies and level 7 for second-cycle studies. Each of the PQF levels has been characterized by general statements on the learning outcomes required for the qualification of a given level. The characteristics of the PQF levels refer to the full spectrum of learning outcomes required for the qualification, that is, knowledge, skills and social competence.

The content related to the environment is directly related to the following characteristics at levels 6–7 of the Polish Qualification Framework (The Regulation of the Minister of Science and Higher Education of November 14, 2018 on the Characteristics of the Second Level of Learning Outcomes for Qualifications at Levels 6-8 of the Polish Qualification Framework, 2018):

- a) from the field of knowledge – the student knows and understands the fundamental dilemmas of modern civilization, and the student knows and understands the (basic) economic, legal, ethical and other conditions of various professional activities related to the field of study,
- b) in terms of social competence – the student is ready to fulfill social obligations, inspire and organize (co-organize) activities for the benefit of the social environment.

In other characteristics, this content may also appear, but as side issues, such as in the skills characteristic where the student is able to conduct (participate in) a debate. Despite the fact that there is little content related to ecology in the study programs, universities conduct activities related to environmental education of young people, try to build environmental awareness and create pro-environmental behaviour by conducting activities outside the study program.

5. CASE STUDY – WROCLAW UNIVERSITY OF SCIENCE AND TECHNOLOGY

Research (Ropuszyńska-Surma, Węglarz, 2017) has shown that only a limited number of courses with pro-environmental content appear in technical studies. It is therefore legitimate to ask about the responsibility of universities and the propagation of pro-environmental attitudes. Universities agree that their role is to foster pro-environmental and pro-saving attitudes and to maintain and strengthen them, and their goal is to build an environmentally responsible community.

So what are universities doing in this topic? To answer this question, the activities undertaken at the Wrocław University of Science and Technology (WUST) in 2021-2024 were analyzed. As mentioned in earlier chapters to build environmental awareness should be based on knowledge, experience and emotional involvement of students and the environmental education conducted should focus equally on the “head”, “heart” and “hands” of students. Thus, the activities of the University were looked at through the prism of these three elements, keeping in mind that emotional involvement is key in creating pro-environmental behaviour.

A Center for Sustainability and Climate Protection has been established at the University with the goal of integrating the University community in an effort to build the Green University of the Future, aiming for zero-carbon. Another initiative is the establishment of the Coalition of Wrocław and Lower Silesian Universities for Sustainable Development and Climate Protection. The goal of the Coalition is to cooperate, initiate and synchronise actions in the area of climate protection in the city of Wrocław and Lower

Silesia (*Center for Sustainability and Climate Protection, 2024*). These institutions are responsible for the activities listed below.

List of completed activities in the area of knowledge (*Center for Sustainability and Climate Protection, 2024; Wrocław University of Science and Technology, 2024*):

- a) Cyclical or one-time conferences, including Current Trends in Air and Climate Protection, Eco-COALITION Congress, Climate Change: Science, Society, “Zero Emission Poland - Challenges of the Future”, ENERGY, MANAGEMENT, ENVIRONMENT 2022, “Young in Energy”, “Technology for Business”,
- b) Climate Days at WUST – an annual event,
- c) Water days at WUST – an annual event,
- d) Lecture forms, such as: open popular science lectures “Closer to Architecture” for students, a series of six debates entitled “Cities of Ideas” in 2024, a workshop “Sustainable development, or how to be a responsible consumer” in 2024, a webinar – socially responsible university, meetings with a low-carbon brand – BMW Inchcape Wrocław,
- e) Education and information campaign entitled: We save at PWr, #GreenPWr,
- f) Eco-education campaign, in which teachers can order a lecture, workshop or field activity for their students at the Faculty of Environmental Engineering,
- g) The “eco-education program for Eco-Education” carried out by the Student Assistance Fund and dozens of other academic organizations.

List of completed activities in the area of experience (*Center for Sustainability and Climate Protection, 2024; Wrocław University of Science and Technology, 2024*):

- a) University competitions, such as the competition for Student Teams to develop a new concept for the development of the inner courtyard in the A-1 building, the “Santander Eco Prizes for WUST students and doctoral students” for the creation of a project for an innovative ecological installation to support WUST's pursuit of zero-emissions, the Polytechnica Nova competition held annually for employee and student projects,
- b) Interdisciplinary university projects, e.g. application of innovative sensor systems to assess air quality on campus, ProtoLab – a week-long design workshop (online) and with hands-on workshops where students implemented their projects under the guidance of tutors,
- c) Participation of students in national and international competitions,
- d) Participation of students from scientific circles in various national and international competitions,
- e) World Water Day, including such activities as a photo contest with a photo exhibition, the premiere of a film on the water footprint, and a field game,
- f) Educational study visit to the Ministry of Climate and Environment.

List of completed activities in the area of emotional engagement (*Center for Sustainability and Climate Protection, 2024; Wrocław University of Science and Technology, 2024*):

- a) The #TrashTagChallenge campaign, which encourages students to clean up their neighbourhoods and develop a good habit of consciously segregating waste and not littering our environment,
- b) KliWRO – a group of students from the University with a keen interest in climate protection issues created a special page on Facebook,
- c) The university's participation in the WWF's Earth Hour campaign.

6. CONCLUSIONS

The article assesses the state of environmental awareness and knowledge of young people from Generation Z based on a review of available studies conducted between 2019 and 2022. From these studies emerges a picture of a society whose environmental knowledge is at a relatively low level, as is the environmental awareness of Generation Z. The society, including Generation Z mostly understands that taking care of the environment is the responsibility of each individual, but a worrying conclusion is that general education has very little impact on students' activities, and the authority of the school and the knowledge it provides are increasingly being replaced by the internet and the media.

This was followed by an assessment of the level of environmental education in the education system on the basis of available research, including reference to the quality of education, to the education system and to environmental education at universities. Based on the research, it can be concluded that it is necessary to implement a coherent policy of social responsibility towards the climate, which should additionally secure resources for its implementation, because without this, even the most valuable activities of the school will have little effect (Rodzoś, 2022). The second conclusion is related to the low level of confidence of Polish society in science and its achievements, which affects the position and effects of school work. On the other hand, on the basis of our own research, it was noted that there is a lack of content related to environmental education, environmental awareness and stimulation of pro-environmental behaviour in study programs. It should be emphasized that in order to build environmental awareness, education should be based on three pillars: knowledge, experience and emotional involvement of students. Therefore, in identifying the University's activities in building students' environmental awareness, they were divided into three categories.

The pro-environmental activities outlined are insufficient, as they mostly focus on imparting knowledge, and somewhat less on activating students into action. On the other hand, there is a lack of activities that build emotional engagement, which is crucial in developing environmental awareness. Over the course of 4 years, only 3 different activities were identified that can be categorized as building emotional engagement. It should be noted that in the study (Guzy, Ochwat, 2022), students complained that their ideas to address the climate crisis are not taken into account, resulting in a small number of activities that build engagement.

6. RESEARCH LIMITATIONS

Limitations of the analysis conducted include: the lack of comprehensive studies of the environmental awareness and knowledge of Generation Z, the subjectivity of assessing the level of environmental education in the education system, and limitations in accessing data from other universities.

Given the lack of comprehensive studies of the environmental awareness and knowledge of Generation Z, the article relies on five different studies, each with a different research sample. In the reports (Chodkowska-Miszczuk et al., 2023; Grupa Badawcza DSC, 2022; Omyła-Rudzka, 2020), the Generation Z was a subgroup of the research sample, one of many, hence the conclusions drawn do not fully reflect the characteristics of Generation Z, as is in the case of the other two reports (Guzy, Ochwat, 2022; Parzonko et al., 2021). The research was conducted over a time frame of three years, but the changes are not dynamic enough to have a major impact on the results obtained.

The conducted evaluation of the level of environmental education in education is partly based on subjective opinions of experts, which, of course, does not reflect the picture of the overall education system, but the author's intention was to draw attention to some existing problems in the field of environmental education. The author is also aware of the fact that the survey conducted among students, was conducted on a non-representative research sample. They were only an attempt to look through the perspective of students on the system of environmental education at the university.

Identification of the university's activities and assigning them to the appropriate categories of knowledge, experience and engagement has been done with due diligence; however, this is the author's subjective observation. The author collected data systematically through a newsletter sent to employees through an intranet. The activities presented here concern only one university, in order to be able to draw somewhat more far-reaching conclusions it would be necessary to conduct similar analyses for other universities, however, access to source data here will be a limitation.

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IMPROVEMENT OF QUALITY MANAGEMENT SYSTEM IN THE ENTERPRISE – CASE STUDY

The article presents the improvement of the quality management system through the example of a selected manufacturing enterprise. Lean Management tools were applied, showing how the development of the enterprise is affected when using appropriate methods, tools, principles, and techniques of quality management. The article presents various stages of the 5S method, which was aimed at maintaining order and discipline at workstations through the development of appropriate habits by employees. In addition, a questionnaire was used to determine the knowledge and attitude of employees concerning the operation of the solutions introduced in the enterprise studied. The research presented in the article shows how it is possible to strive for a significant improvement in quality in the operation of a manufacturing enterprise without the involvement of financial resources.

Keywords: quality management system improvement, Lean Management, 5S method, enterprise, optimization, production, case research.

1. INTRODUCTION

The pursuit of excellence in a enterprise is based on various aspects of an organization. Among others, it concerns products, products or processes. Continuous improvement, the introduction of new improvements relies on the involvement of top management and all employees. It involves quest new solutions in the day-to-day operations of the production processes performed. An important activity is to learn from previous mistakes. Ideas for improvements should come from employees, they are closest to where the problems occur and their involvement in continuous improvement is high (Zimmiewicz, 2000).

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The introduction of the 5S method is aimed at maintaining order, discipline at workstations through the development of appropriate habits by employees. The 5S method methodology is not expensive and is used in both manufacturing and service companies. It consists of five steps, which include: sorting, systematization, cleaning, standardization and self-discipline.

The purpose of the research was to implement the 5S method in a manufacturing enterprise and to check the effectiveness of the implemented system based on surveys of the enterprise's employees.

The scope of work includes:

- Characteristics of the principles of the 5S method as one of the tools of Lean Management,
- Description of the selected enterprise,
- Propose changes to improve quality management,
- Preparation of support materials in maintaining and improving the 5S method,
- Operation of the introduced solutions in the surveyed enterprise based on the questionnaire.

2. CHARACTERISTICS OF THE PRINCIPLES OF THE 5S METHOD AS ONE OF THE TOOLS OF LEAN MANAGEMENT

Among the basic tools of Lean Management is 5S, which aims to introduce and maintain the necessary order in the processes to improve the management system and also to ensure safety at workplaces. The method was developed in 1995 by Hirano, a Japanese scientist. The name 5S comes from the first stages of the letters of Japanese words beginning with "S". The five pillars of 5S include:

- Seiri – sorting;
- Seiton – systematics,
- Seiso – cleaning,
- Seiketsu – standardization,
- Shitsuke – self-discipline (Franke, 2016).

The 5S method is about improving quality, productivity, work streamlining and management (Pacana et al., 2014). It is a set of simple steps leading to the introduction of good habits, which will contribute to increasing the effectiveness and efficiency of work at a given workplace. According to Myrczek (2002), the result of using the 5S method is the elimination of waste and the improvement of the comfort of the work performed.

The first stage is sorting. This process involves distinguishing items that are needed and eliminating unnecessary items, which may include broken and unused machinery, damaged products, non-conforming products, documents, and waste. This stage is intended to improve the process of keeping the workplace clean and the efficiency of searching and retrieving items, while reducing the time of performing operations (Mroczko, 2012).

It can be difficult to distinguish between items needed to do a job and unnecessary items. It is necessary to think about whether an item is definitely unnecessary before it is disposed of. An accompanying activity in the first step of using the 5S method is the use of red labels. It involves labelling red all items deemed unnecessary by employees, moving them to a designated place, and deciding whether to permanently locate them or dispose of them at a certain time according to established procedures (Grycuk, 2012). The use of a red label makes it possible to identify the reason for disposal, the quantity and date of

disposal, and other necessary information needed to identify items as unnecessary (Matysek et al., 2014).

The next step of the 5S stage is systematization. It involves labeling tools, parts and machines and designating where they will be located (Detyna, 2011). It is important to organize the workspace and secure workstations with additional pallets or racks, for example. Ensuring the elimination of waste can be achieved by ensuring cleanliness at the workstation, hence the importance of being aware of regular cleaning (Mazur and Golas, 2010). The main goal of this step is to reduce physical effort and unnecessary movement of workers. Systematization involves preparing tools in a way that makes it easy to find them quickly and easily. Machines, tools used frequently should be located closest to the workstation, so that the employee will save time to find them (Mroczko, 2012). It is helpful to use visual management techniques to implement systematization. Shadow boards, colored lines, labels, marking maximum and minimum levels for production materials, for finished goods and for commodities, captions, arrow marking (<https://lean.org.pl/5s-na-produkcji-i-w-biurze/>) are used to identify the location of items. A helpful activity in the second pillar of 5S can be the proper labeling of items. According to Niewczas (2010), cardboard boxes should be properly signed, whether they are tucked away or in a visible location. Practical and well-liked among employees are shadow boards, they help keep tools organized on the enterprise's premises, while the use of surface markings on the shop floor helps people remember where equipment is stored.

Another pillar is cleaning. According to Mroczko (2012), keeping workplaces tidy makes it possible to increase the safety of the work performed and to control the correct operation of equipment and machinery. An important goal of this action step is to raise awareness among employees that maintaining cleanliness of equipment, machinery and work surfaces should be a repetitive and systematic activity rather than a one-time event. Ongoing and daily removal of dust, shavings, dirt and other contaminants reinforces in employees a sense of awareness about keeping the workplace neat and clean (Matysek et al., 2014). These activities lead to a safe workplace, a clear and clean space, and an increase in employee morale and well-being (Mazur and Golas, 2010). The enterprise must provide adequate cleaning supplies and tools, which are stored in a designated area (Pascal, 2015). An important measure is to create and adhere to cleaning schedules and machine inspections. Cleaning helps eliminate damage, defects and breakdowns among machines (Mroczko 2012). The use of a checklist check sheet is an excellent solution for cleaning verification. A properly developed checklist should be placed next to the workstation on a notice board and filled out and checked by another employee (Jedrzejak et al., 2014).

The fourth step is standardization, which is related to the development and implementation of instructions, procedures or schemes to ensure that order is maintained (Mroczko, 2012). These are primarily standardized and documented solutions developed jointly with all employees during the first three steps. The developed procedures should be well explained and understood by employees. For this reason, single-topic lessons in the form of training and audits are increasingly common and used among companies (Matysek et al., 2014). Standardization is the maintenance of developed working conditions so that they become the habits of employees in their daily work. Prepared checklists, schedules, instructions should be the basis for checking whether employees are fulfilling their tasks. The checklist sheet can address the following questions: "has the employee performed the activity", "how often is the employee supposed to perform the activity" (Jedrzejak et al., 2014). Maintaining order and tidiness at workstations is indispensable in quality improvement processes. According to Niewczas (2010), standards are needed to show the

relationship between cause and effect, standards enable management (maintenance and improvement), avoid international conflicts, ensure quality and safety, and to maintain existing know-how.

The final step of the 5S method is self-discipline. According to Dety (2011), self-discipline involves following and working out the rules adopted in the organization. Staff training plays an important role so that they can eliminate bad habits on their own. This contributes to increased awareness among employees, raising awareness of the work being done, improving interpersonal relations and reducing non-compliance (Mroczko 2012). In order for the final stage of the 5S method to function smoothly, a team should be set up to inspect workstations, present achievements, successes, and analyze the developed evaluation sheets (Selejdak et al., 2012). Self-discipline is the most important pillar of the method, and without its maintenance the first stages of 5s are meaningless. It is important that conscious employees follow the 5S principle (Lunarski, 2012). A friendly and easy way to take care of order should be created. An important role is played by an incentive allowance, for example, in the form of vouchers, trips or a cash bonus for employees who show great commitment to implementing the method (Pacana et al., 2014).

3. RESEARCH MATERIAL AND METHODS

The research object was a manufacturing enterprise engaged in the production of garden furniture and summer and year-round log and amphibious houses. The enterprise is headquartered in Podkarpackie province, Krosno district. The author became familiarized with the specifics of the enterprise and the work performed in it by employees.

The research consisted of several stages. The first step in introducing the 5S method was to explain to employees the purpose of the activities being carried out. The next step was to observe the employees finding out their level of knowledge in quality management. After the observation, it was decided to implement a schedule of activities, and the estimated lead time for the introduction of activities to improve working conditions was presented. The next step was to introduce the five pillars of the 5S method. Pictures of workstations before and after the introduction of the 5S method were taken. The first step of the 5S method was selection, which consisted of distinguishing items needed and using red labels. The next step was systematization, which involved determining how to store needed materials. The next step attempted to eliminate dust, chips, dirt and debris, and took steps to maintain order. The application of the last two pillars of the 5S method was to establish standards and implement them, as well as adherence to the first four principles and self-discipline among employees.

The research material is the results of a questionnaire survey conducted in April/May 2022, where group of fifteen employees was surveyed. The purpose of the survey was to check the functioning of the 5S method in the enterprise. The survey questionnaire included a form including gender, age, education and seniority, as well as factual questions related to the purpose and scope of work. These were closed questions. They concerned the evaluation of the implementation of the 5S method in the enterprise. Respondents were asked, among other things, whether they had knowledge of the functioning of the 5S method, an assessment of how the method was implemented, perceived improvements at the workplace, an indication of the tools that characterize the 5S method, and an indication of which activities resulting from the implementation of 5S are the most important. On the basis of the answers given by the surveyed enterprise employees, analysis and

interpretation were carried out in order to draw conclusions about the evaluation of the implementation of the 5S method.

The collected empirical material was collected and analysed using a Microsoft Excel spreadsheet from Office 2010. Basic statistics (% of indications, abundance) were calculated. The collected and analysed material was presented using descriptive and graphical form.

4. PRESENTATION AND ANALYSIS OF RESEARCH RESULTS

The enterprise under research has been operating in the Podkarpackie province of Krosno county, Rymanow municipality since 2014. It employs fifteen people and is housed in two carpentry shops. The smaller carpentry shop is dedicated to making small details for furniture, swings, among other things. Meanwhile, the second production hall of the carpentry plant was built in 2019 to meet the enterprise's needs for the production of wooden houses.

The carpentry enterprise creates garden furniture (tables, benches, chairs) and summer and year-round houses. The houses are built using the traditional highlander method. In addition, the enterprise also offers: playgrounds, garden swings, flower pots, pergolas, wooden balustrades, stairs, gazebos and canopies. The offers are aimed at private individuals as well as the public. Thanks to its highly qualified staff and modern machinery, the enterprise can perform individual customer orders.

5. PROPOSED DIRECTIONS FOR CHANGES IN QUALITY MANAGEMENT IN THE ENTERPRISE

Observations made at a manufacturing enterprise revealed the problem the enterprise is facing. Despite well-qualified employees and machinery facilities, a problem was observed regarding disorder, lack of discipline and clutter in workplaces. Lack of good organization of the workplace, often searching for the equipment needed at the time, not putting the tool in the right place causes chaos and nervousness among the entire team. After interviews with employees and the owner of the enterprise, it became clear that attempts had already been made to implement corrective measures to facilitate the work. In order to maintain order, introduce discipline among employees and improve the entire Management System, it was decided to implement the 5S method, thanks to the help of a student. The philosophy of the 5S method is characterized by a low financial outlay, and thanks to this, it enables the creation of a well-organized workplace and increases the safety of the workplace.

6. IMPLEMENTATION OF THE PRINCIPLES OF THE 5S METHOD IN AN ENTERPRISE – CASE STUDY

The surveyed enterprise in Q1 and Q2 of 2022 decided to implement elements of the 5S method to streamline workplaces and improve productivity. The first step in implementing the new method was to promote the 5S method. This consisted of presenting the main benefits of the method. The goal of 5S is to raise awareness in the employee so that keeping the workplace tidy becomes a standard.

The next activity was to present a schedule of implementation activities. The owner of the enterprise, in order to implement the 5S method smoothly, asked for the assistance of the Quality Management Supervisor. With the help and involvement, the duration and implementation of the 5S method in the enterprise was estimated and planned. The implementation plan for the 5S method is shown in the table.

Table 1. Schedule for implementation of the 5S method

Pillar 5S	Activities performed	Duration (days)	Person in charge
Selection	<ul style="list-style-type: none"> - Sort items into needed and unneeded, - Implementation of red cards, - Removal of unnecessary items - Determine the purpose of the items in question, - Eliminating threats. 	10	Quality Management Officer, business owner, student
Systematics	<ul style="list-style-type: none"> - Marking places for needed items, - Proper arrangement of items, tools used first. 	5	Quality Management Officer, student
Cleaning	<ul style="list-style-type: none"> - Keeping equipment clean, - Preparation of a schedule for the cleaning work to be carried out - Identification of pollution sources. 	10	Quality Management Officer, business owner, student
Standardization	<ul style="list-style-type: none"> - Developing instructions for controlling the first three pillars of the 5S method, - Designating employees responsible for 5S activities. 	15	Quality Management Officer, student
Self-discipline	<ul style="list-style-type: none"> - Self-control, - Proceeding in accordance with established procedures, - Developing habits to adhere to implemented improvement solutions, - Auditing. 	10	Quality Management Officer, student

Source: own elaboration.

7. EVALUATION AND OPERATION OF THE 5S METHOD IN THE ENTERPRISE

In order to check the effectiveness of the changes introduced through the introduction of the 5S method, a survey was conducted among employees. 15 people took part in the survey. An extremely important element is the analysis of the metric, which included responses regarding gender, age, education and job seniority. 15 people took part in the survey, of which men accounted for 100%. Among the respondents, those in the 31–40 age range predominated – 53%. The second group of respondents were those in the 18–30 age bracket, who accounted for 27% of all surveyed respondents. Respondents between the ages of 41–50 accounted for 13% of the respondents. The smallest number of respondents taking part in the survey was the 51–60 age group (7%) and those over 61 (0%). The largest group of respondents surveyed were those with secondary education (40%). The possession of vocational education was declared by 33% of the surveyed employees, while 13% of the respondents were those with primary and higher education. The largest number of respondents, 40%, had work experience of 10 to 15 years. The second largest group, were employees with work experience of more than 15 years (27%). Respondents with work seniority of 5 to 10 years accounted for 20%, while 13% of surveyed employees had work experience of 2 to 5 years. The primary question addressed to employees of the woodworking and craftsmanship plant was whether they had knowledge of how the 5S

method works. From the data presented in Figure 1, it can be seen that all of the respondents have knowledge of how the 5S method works.

According to the survey data conducted by Krawczuk and Kocira (2016) among the employees of the chemistry department, all the people questioned (100%) had knowledge of the 5S method. Another question asked how employees were informed about the implementation of the 5S method in the enterprise. The largest number of respondents, 47%, indicated that they learned about the plans to introduce the 5S method from their co-worker. On the other hand, 40% of respondents were informed about the intention to implement the method at a meeting with the enterprise's owner. A group of 13% of the surveyed respondents said that they read information about the introduction of changes to workstations from a bulletin board. The next question concerned the evaluation of how 5S was implemented in the enterprise. The surveyed group of employees could choose one option from among several given answers. The analysis showed that 60% of the surveyed employees rated the implementation of the 5S method very well. It turns out that 33% of the surveyed respondents rate the way of implementing the new method well. Only 7% of employees indicated that they give an average rating to the method of implementing 5S at workplaces. In the next question, the surveyed employees were asked whether they perceive differences in the improvement of work at the workplace after the implementation of the 5S method. The data shows that all respondents perceive a difference in the performance of work on the job after implementing the 5S method. According to the data conducted by Lean Management Consulting Group, 61.76% of respondents believe that they see an improvement in the work performed after implementing the 5S method. According to 26.47% of the surveyed respondents, it does not matter at all whether there is a visible improvement a workstation. According to 5.88% of respondents, they do not see an improvement in the productivity of their workstations. At the same time, 5.88% say that the introduction of this method is a head-turner (<https://www.lmcg.com.pl/artykul-lean-Absorpcja-5S.html>). The surveyed employees were asked whether the implementation of the 5S method is associated with an increase in work productivity. Among the respondents, 67% felt that the implementation of the 5S method definitely improved work productivity. More than 13% of the respondents felt that the implementation of the new method did not affect labor productivity. On the other hand, a group of 20% of employees felt that it was difficult to determine the impact of the new solutions on labor productivity.

Another question concerned the evaluation of work at the job of performing work after implementing the 5S method. More than half of the respondents, 53%, indicated that the work is definitely done better at the position after the implementation of the 5S method. Another group is made up of employees who believe that after the implementation of the new method the work is done better – 33%. Only 14% of respondents said that they see no difference after implementing the 5S method in the work performed at their position.

The enterprise's employees were asked to indicate the differences they perceive after implementing the 5S method. The surveyed group of respondents was able to indicate more than one answer option among several. As shown in Figure 1, all employees indicated that the biggest difference perceived after implementing the 5S method is the visibly arranged machinery and equipment. Among those surveyed, 93% of respondents perceived an improvement in the form of a reduction in the need for unnecessary movements. The possibility of increased safety was cited by 80% of employees, while 74% of respondents said that a positive difference from implementing the 5S method was improved

communication between employees. 53% said they saw differences in improved product and work quality. Forty percent of those questioned each said that one of the main differences from the introduction of 5S was that it was easier to see things, due to the fact that they were arranged, and the introduction of more training. Increased responsibilities resulting from the enterprise's changes are perceived by 33% of employees surveyed.

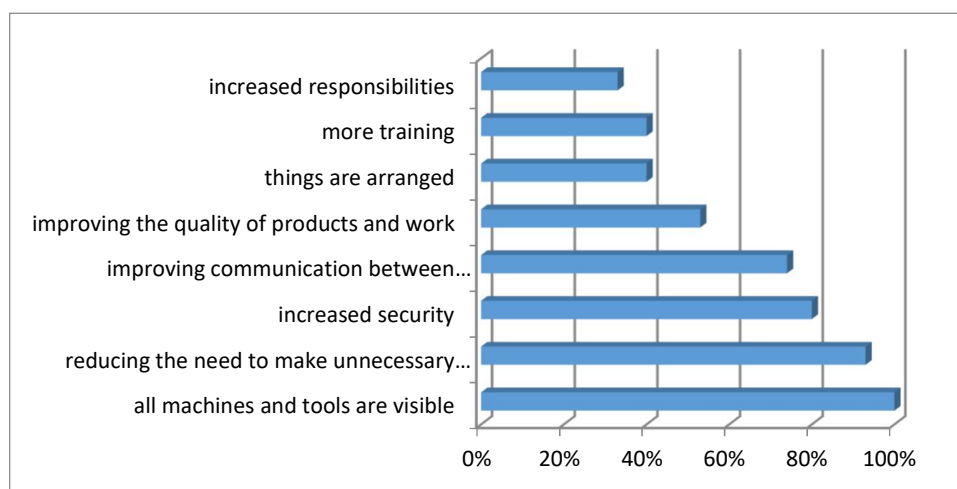


Figure 1. Visible differences after implementation of the 5S method

Source: own research.

Respondents were asked to indicate which pillar of the 5S method they think is the most important on the job. According to 33% of employees, standardization is the most important pillar of the 5S method. 27% of respondents believe systematics, while 20% believe self-discipline. For 13% of employees, sorting is an important element in the correct functioning of the 5S method. Only 7% indicated that, according to them, cleaning is the most important element of the 5S method. Responding to the question about the tools that characterize the 5S method, presented in Figure 2, 80% of people said that, according to them, the red label and self-discipline are the most important tools. According to 73% of those surveyed, the 5S board, as well as signatures and colored lines (67%), are important when implementing the 5S method. When implementing the 5S method, according to 60% of employees, cleaning plays an important role. Also according to 40% of employees, systematics is among the tools for improving the 5S method. Only 33% of respondents indicated that sorting is among the tools that characterize the 5S method and according to 20% of respondents, audits are important. The surveyed group of respondents, among several response options, could indicate more than one.

In a research by Kravchuk and Kocira (2016), the characteristic elements for the 5S method are self-discipline (17%), cleaning and sorting (15%). 14% of respondents said that audits and systematization are important tools when implementing the 5S method. According to 8% of respondents, accompanying elements during the implementation of the 5S method are the 5S board and standardization. According to 6% of respondents, signatures, labels, colored lines and the use of red labels for 3% of employees are integral tools for the functioning of the 5S method.

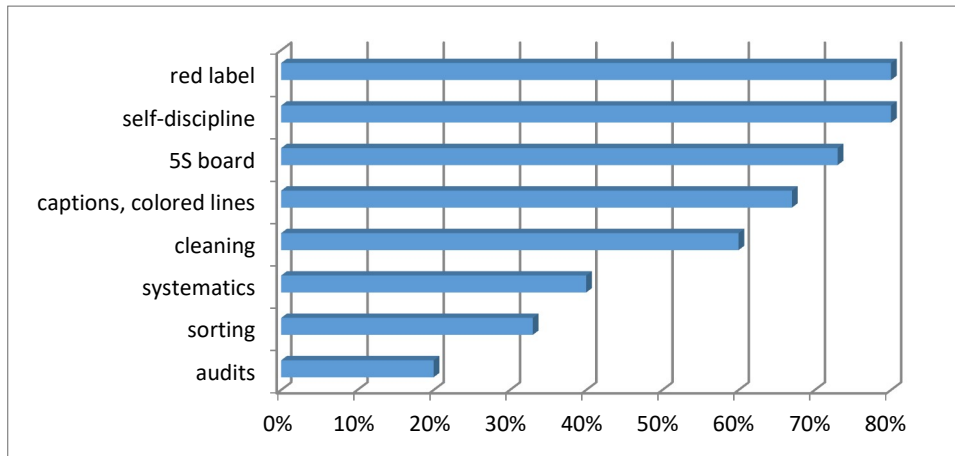


Figure 2. Tools that characterize the 5S method

Sources: own research.

Another question in the survey asked about employees' openness to implementing new methods to facilitate work. 93% of the surveyed employees are open to implementing new methods on the job. Only 7% of respondents believe that the implementation of new methods is unnecessary. The last question addressed to the surveyed employees was to identify the most important activities resulting from the implementation of the 5S method. All of those asked were aware that increased safety was the most important element. For 87% of the surveyed employees, an important factor resulting from the implementation of the 5S method is increased productivity, while 73% indicated orderliness. Putting away and finding items in their place was indicated by 53% of respondents. According to 47% of respondents, they said the process helped improve the production process. The results of the analysis are shown in Figure 3.

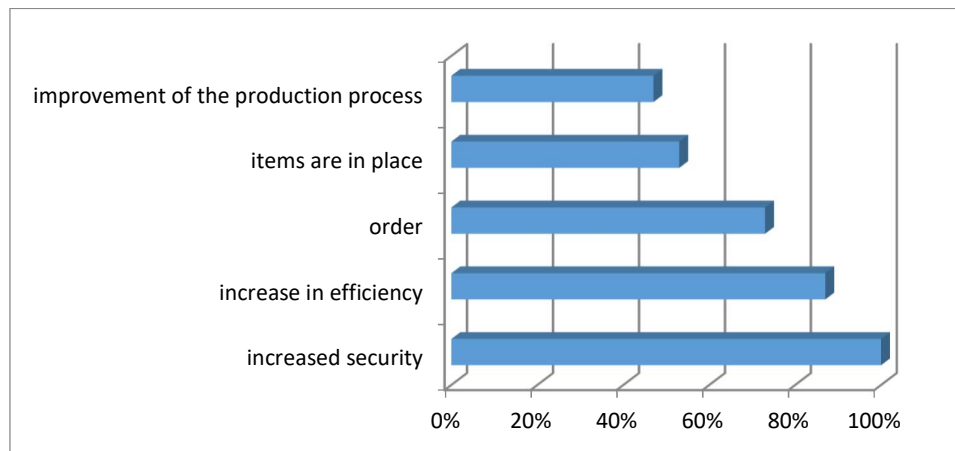


Figure 3. Important activities resulting from the implementation of the 5S method

Source: own research.

8. SUMMARY AND CONCLUSIONS

The implementation of Lean Management tools makes it possible to improve the efficiency of the work performed, at low cost. The 5S method was introduced in the studied enterprise, thanks to which significant changes in quality management were noticed. The introduction of simple solutions with the involvement of employees affected, the quality and efficiency of the work performed. The 5S method has developed in employees simple habits that facilitate the performance of a given activity.

Based on the research, the following conclusions can be drawn:

1. The implementation of the 5S method in the enterprise has influenced, among other things, better organization of work, increased safety in the places where the activity is performed, and better productivity and organization of work. More than 93% of employees are open to implementing new methods to make work easier.
2. The purchase of new equipment and machinery has eliminated shavings, sawdust and dust, and reduced the lead time of the order.
3. The involvement of all employees associated with the implementation of the new method allowed the team to get to know each other better, which had a positive effect on improving communication relations among employees.
4. Organizing and removing unnecessary items and giving items their storage location has reduced the time spent searching for machinery and tools.
5. When it comes to evaluating how the 5S method was implemented at the enterprise, employees believe that it was implemented in a very good, good way at the surveyed plant. The visible differences after implementing the 5S method, according to the employees, were the ability to easily find machines and tools, reducing the need for unnecessary movements, increasing safety and improving communication between employees.
6. According to the employees surveyed, standardization appeared to be the most important pillar in the implementation of the 5S concept.

The implementation of the 5S method in the surveyed enterprise makes it clear that it has had a positive impact on employees and the enterprise as a whole. The surveyed results confirm the idea of implementing the improvement of the quality management system. Maintaining order in workplaces allows for the rapid elimination of faults and failures, thanks to which the level of safety is significantly higher. Adequate involvement of the entire team in the organization of work by submitting their comments, ideas improved the process of implementing the method. Developing habits among employees, such as giving order by putting objects in their place, increased productivity and quality of work and eliminated unnecessary movement.

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The Journal annually publishes a list of reviewers: in the last issue of the quarterly – No. 4 (2024) and on the website:

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Previous name of the Journal: *Ekonomia i Nauki Humanistyczne*, ISSN 1234-3684

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Reviewing standards, information for authors, the review form, instruction for authors and contact details to HSS Editors and to Publishing House are also published in the fourth number of Humanities and Social Sciences, 31, No. 4 (2024).

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