

**ACTA OECONOMICA
UNIVERSITATIS SELYE**
Vedecký recenzovaný časopis

**6. ročník
1. číslo**

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PREVALENCE OF A CODE OF ETHICS IN THE CZECH REPUBLIC IN RELATION TO COMPANY SIZE AND MARKET ACTIVITY

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Abstract

A code of ethics is one of the main ethical organizational management tools. Therefore the main objective of this article was to determine, on the basis of the results of the questionnaire survey in 607 Czech companies, whether the presence of a code of ethics in a company depends on the size of a company and its market activities in terms of the area in which it operates. The results of the survey have shown that there is a statistically significant increase in the prevalence of a code of ethics with company size but the increase in the prevalence of a code of ethics is uneven. The next finding was that there is a statistically significant increase in the prevalence of a code of ethics in relation to the increasing market activities of a company (among national, multinational and regional companies). It may therefore be concluded that the increase in the prevalence of a code of ethics according to market activities is demonstrable but not substantial.

Key words: *ethical management, code of ethics, prevalence, market activity*

JEL Classification: M00, M14

Introduction

The first studies into codes of ethics appeared in the 1950s and 1960s in the USA. In the 1950s, 15% of large companies had adopted codes of ethics. By the 1960s, the proportion of such companies to do so had increased to 40%, with the proportion rising to 75% by the 1980s and to 93% by the 1990s (Štíčka et al., 2008). A Business Ethics Centre report from the end of the last century revealed very interesting information. It showed that in 1986, 93% of companies had introduced codes of ethics, which was equivalent to a 10% increase compared to 1979 (Rogers and Swales, 1990). Ethics Resource Center research, which addressed 747 respondents (Harman, 2001), showed that nearly 75% of companies reported the existence of a code of ethics, and that this

proportion was 57% among smaller companies with less than 100 employees. In 2001, in research conducted by KPMG in South Africa, 86% of companies had a code of ethics (KPMG, 2002). In 2003, in research conducted by Deloitte (2004), which involved 373 respondents, 83% of companies in the USA had a code of ethics. A National Business Ethics Survey (Ethics Resource Center, 2005) showed that in 2005, 86% of companies used a code of ethics. In 2006, according to LRN (2006), 79% of companies utilised a code of ethics. A global survey conducted by KPMG (2008) points to the worldwide trend for increasing numbers of companies to define and implement a code of ethics. The research showed that in 2008 the proportion of companies with a code of ethics stood at 86%. It is clear from the above that in recent years a code of ethics has become a standard basic tool for ethics programmes within large and renowned companies. This is also backed up by an informal survey conducted by IBE in 2012, which showed that a code of ethics was implemented by 92% of those companies with the highest market capitalization based in Great Britain whose shares are traded on the London Stock Exchange (IBE, 2012). The IBE survey (2012) also reported that in 2012, 73% of all companies had a code of ethics. The CGMA (2015) conducted a survey in which nearly 2,500 respondents from ten countries participated. The overall results showed that the proportion of companies with a code of ethics stood at 82% (and among large companies 93%). In 2016, according to a worldwide survey conducted by PwC, the largest of its kind, in which 6,337 companies from 115 countries participated (including 79 prominent companies from the Czech Republic), on average 82% of companies had a formally established code of ethics (PricewaterhouseCoopers, 2016).

One of the latest surveys was conducted in 2016 by Dow Jones and Metricstream (2016) and showed that 96% of the 330 questioned companies had a code of ethics. The aforementioned surveys indicate the growing trend towards the introduction of codes of ethics in business practice. However, it is important to highlight that not all these surveys are compatible. In actuality, the results depend on numerous factors, in particular on the structure of the respondents. Whilst a higher proportion of large US based companies have codes of ethics, this proportion is smaller for small and medium-sized companies and companies operating in Asia. It is clear that only global surveys with large numbers of respondents from all business sectors and companies of different sizes will therefore provide the relevant information required. Unfortunately, such surveys are difficult to realize.

According to a survey conducted by the Association of Chartered Certified Accountants (ACCA), one in five managers or accountants in the Czech Republic has had to deal with a serious ethical dilemma in their work. This only confirms the necessity of introducing effective ethical management tools (Transparency International, 2015). Džbánková (2003) concluded, on the basis of her smaller less representative survey conducted in 2002, in which 60 representatives participated from middle and top management in companies operating in Prague and Central Bohemia, that 35% of the questioned companies had a code of ethics in place and 22% were considering drafting and implementing one. In contrast, Transparency International – Czech Republic in conjunction with the Economic University in Prague, conducted a very representative survey in 2005, which was repeated in 2006. The surveys sought to

determine the degree to which codes of ethics were applied in companies that operated on the Czech market. The conclusion was that in the second half of 2005 only 59 companies (i.e. 10.3%) of the 574 questioned had a code of ethics in place. This situation was similar when the survey was repeated in the first half of 2006, whereby only 104 companies (i.e. 8.4%) of the 1,240 in the sample set had a code of ethics in place. The survey also proved that there was a relationship between company size and the existence of a code of ethics. The larger the company the greater the chance a code of ethics existed. For example, in 2006, less than 5% of small companies (i.e. with less than 50 employees) had a code of ethics, whereas this percentage among large companies (i.e. with 300 or more employees) exceeded 24%. Dytrt et al. (2011) state that in 2011, less than 15% of domestic companies had a code of ethics in place. In a more recent survey conducted by Transparency International in 2013, the results showed that this percentage had increased to 46% of domestic companies. However, this compares to the world average of 74% (Neovlivní.cz, 2015). According to the respondents of a questionnaire survey conducted in 2015, the results of which were processed by the Financial and Economic Institute, 68% of companies had a code of ethics, but only 23% of companies saw the code of ethics as a binding set of rules (Finanční a Ekonomický Institut, 2015). According to the previously mentioned PwC survey, in which 6,337 organizations from 115 countries participated, 86% of the 79 prominent Czech companies questioned had a formally established code of ethics. However, the low number and the size of the companies involved belies reality (PricewaterhouseCoopers, 2016).

Despite these results, the number of companies in the Czech Republic that are establishing a code of ethics is gradually growing, although the numbers remain well below the global average (which is higher than 70%). It seems that, the presence of a code of ethics in the Czech Republic tends to be limited to larger companies and public institutions and could depend on their market activities as well.

Material and methodology

In cooperation with the Czech Statistical Office, a sample set of companies was selected from all size categories in compliance with EU nomenclature. The emphasis was placed on selecting companies that were representative of the basic spheres of the national economy. In total, 1,420 companies were included in the sample set. The empirical research, in the form of a questionnaire survey, was conducted in the second half of 2016 among the heads of personnel departments. In addition to acquiring basic information about the respondents (company name; contact data; area of business activity; economic results), the questionnaire contained eight items with respect to codes of ethics. All the respondents were guaranteed anonymity with regards to the presentation of the research results. The questionnaire survey was conducted by students and academic staff. The majority of respondents replied in electronic form by means of an electronic reference within the Google – disc web platform. The paper form was used to a minimum extent. The targeting of heads of

personnel departments resulted in 607 completed and returned questionnaires i.e. a return rate of 42.75%. R statistical software was used to process and evaluate the data, whilst the accompanying tables and graphs were prepared by means of the table calculator in Microsoft Excel.

The final structure of the sample set was as follows:

Micro-companies (< 10 employees)	141	23.2%
Small companies (10-50 employees)	179	29.5%
Medium-sized companies (50-249 employees)	164	27.0%
Large companies (≥ 250 employees)	123	20.3%
Total number of companies	607	100%

On the basis of the conviction that the presence of a code of ethics in Czech companies is related to company size and its market activities in terms of the area it operates in, the following hypothesis was formulated, tested and evaluated:

The presence of a code of ethics is related to the size of a company (micro-companies, small, medium-sized and large companies), whereby the larger the company the greater the likelihood of the presence of a code ethics, and a company's market activities in terms of the area it operates in, whereby regional – the least, national – more, multinational – the most.

The main objective was to determine, on the basis of the results of the questionnaire survey, whether the presence of a code of ethics in a company depends on the size of a company and its market activities in terms of the area in which it operates. The processing of the survey results was divided into two parts. A number of companies did not provide a response to the question: “Does your company have a code of ethics?” It was therefore decided to assign the answer “No, we do not miss it” to these cases on the basis of the assumption that omitting to answer the question automatically showed that the company did not have a code of ethics. In addition, our interest was only in whether a company had or did not have a code of ethics. As a result, it was decided, for this analysis, to combine the number of responses for: “No, we do not need it” and “No, but we think we need it” into one group “No”.

For the analysis of the dependence of the presence of a code of ethics on company size, the 607 companies which took part in the survey were divided into four categories: large companies (≥ 250 employees), medium-sized companies (50 – 249 employees), small companies (10 – 49 employees) and micro-companies (< 10 employees).

For the analysis of the dependence of the presence of a code of ethics on the market activities of a company, the companies were divided into three groups (multinational, national and regional companies). As two of the companies did not identify their market activities, the data they provided was disqualified from further processing. As a result, the data from only 605 companies were further analysed.

The procedure for the processing of both parts of the results was the same. Tables and graphs of absolute numbers and relative frequencies were generated with regards to the “Yes” and “No” responses to the question related to the existence of a code of ethics. Based on the frequencies obtained, a series of statistical tests were carried out within the individual groups of companies according to their size and their market activities. The research question was whether the proportion of “Yes” responses within each group is statistically significant; and moreover, what percentage this difference is. In terms of the statistical tests, an additional question was whether the zero hypothesis i.e. that the proportion of “Yes” responses within one group is statistically significant by difference d than the proportion of “Yes” responses within the second group. The tests were run on all companies within the groups and between the groups, for d = 0 (the difference is statistically significant regardless of the specific value obtained), d = 0.1 (the difference in the proportion of the responses within the first group is statistically significant i.e. higher than 10%, compared to the second group), and d = 0.2 (the difference in the response rate in the first group is statistically significant i.e. higher than 20%, compared to the second group). The values of the statistical tests and the p-values for the individual tests were subsequently placed in a matrix for greater clarity. The statistically significant differences are highlighted in bold in the tables. In the matrix, the values in the grey cells show that in the group in the given line, the prevalence of a code of ethics is more frequent and statistically significant than the given difference for the group in the relevant column. All the tests were performed at a significance level 0.05 using R statistical software. The tables and figures were generated using MS EXCEL.

Results a discussin

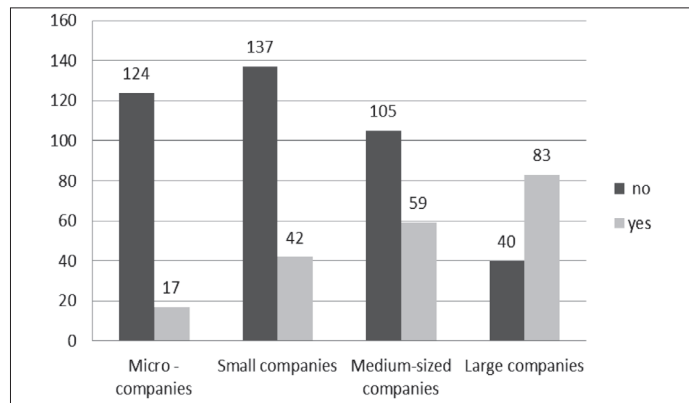
Results of statistical data processing

Table 1 Prevalence of a code of ethics and company size (number)

Company size	Prevalence of a code of ethics		
	No	Yes	Total
Micro	124	17	141
Small	137	42	179
Medium-sized	105	59	164
Large company	40	83	123

Source: authors

Figure 1 Prevalence of a code of ethics and company size (number)



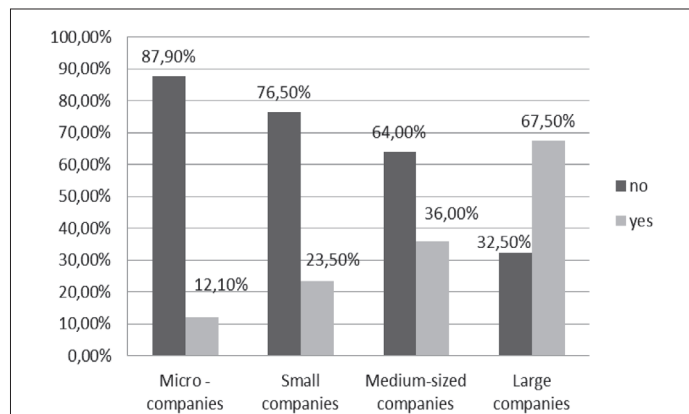
Source: authors

Table 2 Prevalence of a code of ethics and company size (percentage)

Company size	Prevalence of a code of ethics	
	No	Yes
Micro-companies	87.9%	12.1%
Small companies	76.5%	23.5%
Medium-sized companies	64.0%	36.0%
Large companies	32.5%	67.5%

Source: authors

Figure 2 Prevalence of a code of ethics and company size (percentage)



Source: authors

Results of the statistical tests:
Differences in proportions: d = 0

Table 3 Test statistics

Company size	Micro	Small	Medium-sized	Large
Micro	×	-2.612367804	-4.81501407	-9.260441435
Small	2.612367804	×	-2.539517319	-7.630471141
Medium-sized	4.81501407	2.539517319	×	-5.282674481
Large	9.260441435	7.630471141	5.282674481	×

Source: authors

Table 4 P-value

Company size	Micro	Small	Medium-sized	Large
Micro	×	0.995504127	0.999999264	1
Small	0.004495873	×	0.994449723	1
Medium-sized	7.35948·10 ⁻⁰⁷	0.005550277	×	0.999999936
Large	0	1.16573·10 ⁻¹⁴	6.36557·10 ⁻⁰⁸	×

Source: authors

In the table, the cells marked in grey represent pairs of groups where the proportion of “Yes” responses for the group in the line is statistically significantly higher than the proportion of “Yes” responses for the group in the relevant column. The results confirm the main hypothesis i.e. the prevalence of a code of ethics increases with company size. The value highlighted in bold in the second line demonstrates that the prevalence of a code of ethics is more frequent in small companies than in micro-companies. The third line shows that the prevalence of a code of ethics in medium-sized companies is statistically significantly higher than in small companies and micro-companies. Finally, the fourth line shows that the prevalence of a code of ethics in large companies is more frequent than for all the other groups of smaller companies.

Differences in proportions: d = 0.1

Table 5 Test statistics

Company size	Micro	Small	Medium	Large
Micro	×	-1.792583082	-6.42695394	-10.7253493
Small	-3.12109751	×	-7.606849049	-12.01035727
Medium-sized	2.656469555	3.418935919	×	-6.978910658
Large	7.431828013	8.398105557	3.625249657	×

Source: authors

Table 6 *P-value*

Company size	Micro	Small	Medium-sized	Large
Micro	×	0.963480193	1	1
Small	0.999099108	×	1	1
Medium-sized	0.003948179	0.000314333	×	1
Large	5.35127·10 ⁻¹⁴	0	0.000144341	×

Source: authors

The results indicate that all the differences with regards to the prevalence of a code of ethics are statistically significantly higher than 10%, with exception to the differences between micro-companies and small companies. The statistical test performed found a more significant difference, however, it does not exceed 10%.

Differences in proportions: $d = 0.2$ Table 7 *Test statistics*

Company size	Micro	Small	Medium-sized	Large
Micro	×	-1.713991609	-6.166365386	-10.9323295
Small	-6.108695203	×	-7.983045963	-12.24551652
Medium-sized	-1.414745903	0.719493349	×	-8.749962543
Large	4.109818319	5.744533246	1.976512721	×

Source: authors

Table 8 *P-value*

Company size	Micro	Small	Medium-sized	Large
Micro	×	0.956734867	1	1
Small	0.999999999	×	1	1
Medium-sized	0.921428495	0.235918499	×	1
Large	1.97985·10 ⁻⁰⁵	4.60874·10 ⁻⁰⁹	0.024048368	×

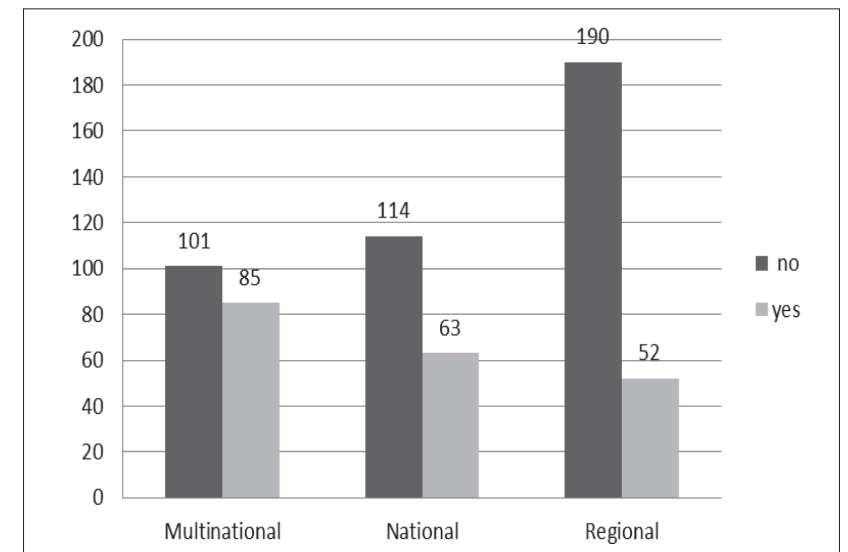
Source: authors

The tables above show that it is only in large companies where the difference with regards to the prevalence of a code of ethics is higher than 20% compared to the other groups. The differences between the other groups is smaller.

Table 9 *Prevalence of a code of ethics and market activity (number)*

Market activity	Prevalence of a code of ethics		
	No	Yes	Total
Multinational	101	85	186
National	114	63	177
Regional	190	52	242

Source: authors

Figure 3 *Prevalence of a code of ethics and market activity (number)*

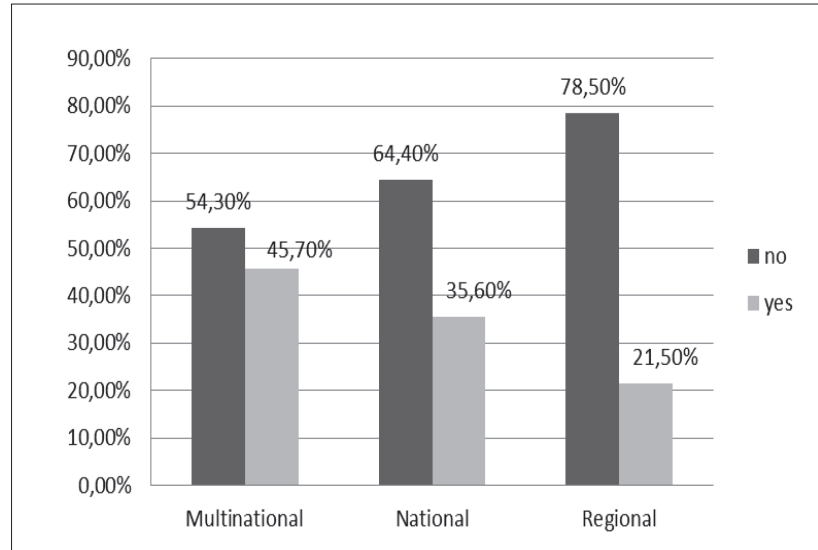
Source: authors

Table 10 *Prevalence of a code of ethics and market activity (percentage)*

Market activity	Prevalence of a code of ethics	
	No	Yes
Multinational	54.3%	45.7%
National	64.4%	35.6%
Regional	78.5%	21.5%

Source: authors

Figure 4 Prevalence of a code of ethics and market activity (percentage)



Source: authors

Results of the statistical tests:
Differences in proportions: $d = 0$

Table 11 Test statistics

	Multinational	National	Regional
Multinational	×	1.958451949	5.322280445
National	-1.95845195	×	3.196006871
Regional	-5.32228044	-3.19600687	×

Source: authors

Table 12 P-value

	Multinational	National	Regional
Multinational	×	0.025088502	$5.12372 \cdot 10^{-08}$
National	0.974911498	×	0.000696719
Regional	0.999999949	0.999303281	×

Source: authors

These results show that the prevalence of a code of ethics increases according to the increasing market activities of a company. The first line in the table indicates that among multinational companies the prevalence of a code of ethics is statistically significantly higher than among national and regional companies. The

second line in the table indicates that the prevalence of a code of ethics is statistically significantly higher in companies that operate nationally than in those companies that operate regionally. The results therefore confirm the main hypothesis.

Differences in proportions: $d = 0.1$

Table 13 Test statistics

	Multinational	National	Regional
Multinational	×	0.020209923	3.007773097
National	-3.84244333	×	0.881325409
Regional	-7.29369403	-5.23930215	×

Source: authors

Table 14 P-value

	Multinational	National	Regional
Multinational	×	0.491937956	0.001315848
National	0.999939092	×	0.189070859
Regional	1	0.999999919	×

Source: authors

The results above show that there is a statistically significant difference (higher than 10%) with regards to the prevalence of a code of ethics between multinational and regional companies. Such a difference was not detected between the other groups. The frequencies obtained through the questionnaire would indicate the prevalence of such a difference, however, the available data shows that this cannot be verified statistically, with exception that is to the above case.

Differences in proportions: $d = 0.2$

The statistical tests performed did not show that there was a statistically significant difference (higher than 20%) with regards to the prevalence of a code of ethics according to market activities between any of the groups. As a consequence, the test results were not analysed as part of this study.

Conclusion

The results of the research have shown that there is a statistically significant increase in the prevalence of a code of ethics with company size. However, the difference between micro-companies and small companies does not exceed 10%. The prevalence of a code of ethics in medium-sized companies is more than 10% higher than in the group of small companies (i.e. including micro-companies) and in the group

of large companies. It was demonstrated that the prevalence of a code of ethics in large companies compared to medium-sized companies is statistically 20% higher. The increase in the prevalence of a code of ethics is therefore uneven.

There is a statistically significant increase in the prevalence of a code of ethics in relation to the increasing market activities of a company. The survey results show that the difference with regards to the prevalence of a code of ethics is up to 10% in regional and national companies, and between multinational and regional companies no higher than 20%. It may therefore be concluded that the increase in the prevalence of a code of ethics according to market activities is demonstrable but not substantial.

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OČAKÁVANIA A PREDSTAVY „Z” GENERÁCIE
UNIVERZITNÝCH ŠTUDENTOV OD TRHU PRÁCE

EXPECTATIONS AND VISIONS OF „Z” GENERATION
OF UNIVERSITY STUDENTS IN RELATION
TO THE LABOUR MARKET

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Abstract:

At the present there is the youngest “Z generation” being discovered at the labour market in the position of graduates. This generation comes into initial contact with the labour market therefore we can hardly practically imagine their labour behaviour or expectations. On the other hand it is already possible to explore their visions and labour market expectations. Own survey on labour expectations of this generation are presented in this paper which were carried out in Hungary on the sample of respondents of the first year Bachelor students. The main objective was to assess the needs of younger generation in relation to their future labour positions salaries and expectations. Mapped current situation in this field justifies the need for the existence and operation of service-oriented jobs as well as the need for deepening knowledge on the labour market.

Key words: *expectations, labour market, reality, Z generation*

Abstrakt:

V súčasnosti sa na trhu práce začína v pozícii absolventa objavovať najmladšia „Z generácia“, ktorá prichádza do prvotného kontaktu s trhom práce, preto si jej pracovné správanie a očakávania vieme len ťažko prakticky predstaviť. Zároveň je však možné preskúmať už v súčasnosti ich predstavy a očakávania od trhu práce. Vlastná štúdia o pracovných očakávaniach tejto generácie predstavuje výsledky

a zistenia, ktoré sme realizovali v Maďarsku na vzorke študentov prvého ročníka bakalárskeho štúdia. Cieľom výskumnej úlohy bolo zhodnotiť potreby mladých ľudí v súvislosti s ich budúcimi pracovnými miestami, ako aj v súvislosti s ich platovými očakávaniami a s pracovnou pozíciou. Nami zmapovaná súčasná situácia v tejto oblasti odôvodňuje potrebu existencie a fungovania služieb orientovaných na voľbu povolania, taktiež potrebu prehlbovania poznatkov o trhu práce.

Kľúčové slová: očakávania, trh práce, realita, Z generácia

JEL Classification: J400, J240, J210

Úvod

Zužovaním zamestnanosti, ktoré je badateľné naprieč Európou, sa vynára aktuálna otázka, ako ovplyvnia tieto zmeny mladú generáciu, možnosti absolventov, ich šance na trhu práce. Výsledky výskumov a štúdií v tejto oblasti, ako aj prieskumy v rámci diplomových prác indikujú, že mládež nie je dostatočne zorientovaná vo svete práce. Málo poznajú procesy na trhu práce, súčasný stav a budúce možnosti zamestnanosti. Je preto dôležitou spoločenskou úlohou vychovať rozhladených, zodpovedne sa rozhodujúcich, adaptabilných mladých ľudí. Tento cieľ je možné dosiahnuť cestou starostlivejšieho vybudovania a manažovania systému vzdelávania, ako ja cestou efektívneho odovzdávania informácií v rámci rodín. Z generácia, ako druhá digitálna generácia, zároveň prináša pre staršiu generáciu špecifické problémy a výzvy – tak v procese vzdelávania, ako aj v prostredí trhu práce. Zmenil sa proces komunikácie, spôsob myslenia, niektoré črty správania sa, do popredia sa dostáva on-line priestor, a s ním taký systém fungovania, ktorý sme doposiaľ nepozorovali. Preto je dôležité zaoberať sa tým, aby sa neprehlbovala priepasť medzi Z generáciou a ostatnými generáciami. Je potrebné spoznať a pochopiť tento jav a proces, pretože len tak bude efektívna spolupráca v zamestnaní, vo vzdelávaní aj v súkromnom živote.

Spoločensky užitočný produktívny vek v klasickom význame, v súčasnosti zaznamenávajúci rastúcu tendenciu, predstavuje 20-25 rokov, čo považujeme za dlhodobu platnú hodnotu. Samotná generácia je podľa definície (McCrindla & Wolfingera, 2010) zhľukom takých osôb, ktorí sa narodili v tom istom čase, to isté obdobie ich formovalo, vplývali na ne tie isté spoločenské javy, čiže predstavujú totožnú životnú etapu, totožné podmienky existencie, technológie, udalosti a skúsenosti – ktoré ich viažu do jednej skupiny.

K Z-generácii patria tie osoby, ktoré sa narodili v období rokov 1995 – 2009. V odbornej literatúre sa táto generácia často pomenúva tiež ako „net generácia“, alebo „generácia digitálnych domorodcov“ (Jones & Shao, 2011). Táto generácia tvorí na báze populačnej vekovej pyramídy najmenšiu vekovú skupinu, sú to tí, ktorí vyrástli v málopočetných rodinách, pretože sú mnohokrát deťmi matiek, ktoré uprednostnili svoj kariérny rast, a založenie rodiny odložili na neskoršiu periódu ich života (tridsiatničky – štyridsiatničky). Táto generácia predstavuje prvú globálnu

generáciu, pretože sa narodili do doby, ktorú čím ďalej tým viac určujú rôzne digitálne technológie, s ktorými prakticky spolu vyrastajú (Kapil & Roy, 2014). Hlavným informačným zdrojom uvedenej generácie je tiež web. Zároveň sú zvyknutí na neustále vzájomné kontaktovanie sa, plynulé, bezbariérové a okamžité prístupy k informáciám na internete. „Ak sa s nimi chceme stretnúť, musíme ich najskôr hľadať na facebooku“ (Tari, 2010). Teda aj ich socializácia prebieha vo virtuálnom priestore. Je pre nich charakteristické, že profesionálne spravujú elektronické prístroje, v spoločenskom priestore denne komunikujú so stovkami osôb, disponujú viac než tisíckou priateľov. Priamu každodennú interpersonálnu komunikáciu vnímajú ako stresovú situáciu, preto sa viac uzatvárajú do seba a vyhľadávajú bezpečnosť, ktorú im internet ponúka. Z generácia sa vyznačuje inštinktívnou schopnosťou a zručnosťou zvládania viacerých paralelných činností (multitasking), ako aj učenie formou spolupráce a samoregulácie. Táto generácia prejavuje uvedené zručnosti výhradne mimo školy, počas voľného času samo regulujúcim spôsobom, respektíve sa učí vo svete internetu od rovesníkov (Kissné, 2014). Popri všetkých zručnostiach a ich prejavoch sú pre túto generáciu veľmi dôležité skúsenosti, je pre nich dôležité aby sa cítili dobre, či už v práci, alebo doma (Tabscott, 2009). Niektorí považujú Z generáciu za múdrejšiu, schopnejšiu seba riadenia, a schopnejšiu rýchlo spravovať informácie než predchádzajúce generácie. Avšak jedna vec nemusí platiť pre túto generáciu – že sú tímoví hráči (Igel & Urquhart, 2012).

(Geck, 2007) píše, že členovia z generácie sú presvedčení o svojej jedinečnosti, pretože ich narodenie sa zhoduje s obdobím nástupu grafického webu a dnešného internetu. Od detstva vyrastali títo teenageri v prostredí obklopenom využívaním grafických webových prehliadačov, notebookov, mobilných telefónov, instant messenger služieb, širokopásmových, bezdrôtových video hier. Táto forma pripojenia umožňuje tejto generácii komunikovať a spolupracovať v reálnom čase nezávisle od fyzického umiestnenia.

Z generácia vstupuje v súčasnosti do vekovej kategórie, kedy sa začína objavovať v pozícii absolventov začínajúcich na trhu práce. Preto pracovné správanie sa Z generácie môžeme v súčasnosti len predpokladať alebo odhadnúť, avšak na základe doterajších poznatkov – v porovnaní s predchádzajúcou generáciou – je zrejmé, že disponujú úplne rozdielnymi očakávaniami od trhu práce (Ozkan & Solmaz, 2015), čo predstavuje pre zamestnávateľské organizácie významnú výzvu (Singh, 2014). Je pravdepodobné, že aj Z generáciu budú charakterizovať rýchle zmeny. Žijú oveľa dynamickejšim spôsobom života ako ich predchodcovia, a budú pripravení na okamžité zmeny. Bez kompromisov budú schopní zmeniť prácu, kedykoľvek pociťia takú potrebu, a neobávajú sa, že nemajú stály príjem a stály pracovný pomer. Príznačnými znakmi tejto generácie sú: praktické hľadisko a sloboda jednotlivca. Veľmi oceňujú bezprostredné neformálne prostredie. Ich príznačnými charakteristikami nie sú slová a emócie, predstavy sú schopní realizovať aj na úkor vážnych obetí. Je to generácia, ktorá nie jednotlivo, ale spoločne slúži spoločnosti. Pri výbere zamestnania preferujú možnosť, ktorá ponúka vedomé stratégie a príležitosti v oblasti ekologického myslenia a spoločenskej zodpovednosti (Kissné & Ferincz – Szabó, 2014). Pozornosť sa okrem začlenenia talentu novej Z generácie a jej udržania sústre-

d'uje na vytvorenie spolupráce medzi rôznymi generáciami (Hadijah & Badaruddin, 2015). Je známym faktom, že prechod zo štúdia do práce je proces, ktorý sa stal rozmanitejším a zložitejším - a to najmä kvôli zmenám na trhu práce, ako aj kvôli kariére mladšej generácie. Prvé platené zamestnanie možno v súčasnosti považovať za hranicu, ktorá oddeľuje etapu mladosti od mladej dospelosti. Je to prechodná fáza, počas ktorej si mladý človek vyberá medzi viacerými pracovnými miestami a prácami, čím si môže v skutočnosti vyskúšať rozličné odborné oblasti, a vybrať si vyhovujúce zamestnanie podľa vlastných očakávaní. V tejto životnej fáze majú absolventi možnosť vyskúšať si príležitosti a prekážky, ktoré im ich odbor poskytuje. V profesionálnej oblasti získaný dojem môže neskôr vplývať na neskoršiu zamestnanosť, ako aj na budúce rozhodovania (Nagy & Szűcs, 2009). Preto sú prvé získané skúsenosti na trhu práce rozhodujúce.

V poslednej dobe bola situácia Y a Z generácie mladých ľudí (študentov univerzít a vysokých škôl) v krajinách V4 preskúmaná z pohľadu ich predstáv a očakávaní od trhu práce (Cechurová a kol., 2016). Vo všetkých skúmaných krajinách bolo preukázané (síce v odlišnej miere), že znalosti absolventov boli v porovnaní s požiadavkami trhu práce nedostatočné. V Maďarsku bolo zistené, že kompetencie diplomovaných absolventov boli v porovnaní s očakávanými kompetenciami zo strany zamestnávateľov výrazne rozdielne. Uvedené zistenie môže spôsobiť problémy súvisiace s integráciou generácie Y a objavujúcou sa generáciou Z do zamestnania (Varga a kol., 2015, 2016). Úspechy mladej generácie na trhu práce ovplyvňuje rad faktorov. Jedným z nich je napríklad rodinné zázemie. Deti rodičov s vyšším dosiahnutým vzdelaním získavajú s vyššou mierou pravdepodobnosti maturitné vzdelanie a študujú na vyššej úrovni vzdelávania, čím sa dostávajú na trh práce s lepšími šancami. Nezamestnanosť rodičov, najmä otcov rodín, sa mnohokrát dedí na mladšie generácie. Popri mladej generácii s nízkym dosiahnutým stupňom vzdelania sú zvlášť ohrozenou skupinou nekvalifikovaní, skupiny žijúce v zaostalých oblastiach, spoločensko-ekonomicky znevýhodnené skupiny, skupiny rómskeho pôvodu alebo inak znevýhodnené skupiny. Šance na zvýšenie zamestnanosti absolventov podporuje možnosť praxe v podnikoch, nezávislých od vzdelávacej inštitúcie, pretože tak môžu absolventi získať skúsenosti a zručnosti v skutočnom pracovnom prostredí (Szabó, 2015). Faktorom, ktorý ovplyvňuje proces zamestnanosti mladých, je aj sama cieľová skupina. Väčšia je šanca na zamestnanie, osvedčenie sa na trhu práce, šanca pre dosiahnutie pracovných úspechov - ak si uchádzač vyberie profesiu, ktorá zodpovedá jeho záujmu a schopnostiam. Uvedené zistenie zdôrazňuje dôležitosť existencie a činnosti poradenstva pri výbere povolania a profesie. Tento proces je potrebné zahájiť už v období vzdelávania na základnom stupni. Príležitosti na trhu práce zlepšujú dobré študijné výsledky, ovládanie cudzích jazykov a maturitná skúška. Následne ovplyvňujú uvedené faktory aj ďalšie vzdelávanie, čo v konečnom dôsledku môže priniesť vyššie mzdy a stabilnejšiu pozíciu na trhu práce (Quintini, 2014).

Samotná predstava Z generácie o tom, čo si predstavujú pod pojmom podnikateľ - sa líši. V ponímaní českej Z generácie je podnikateľ vnímaný ako tradičný obchodník, ktorý začína svoje podnikanie na základe podnikateľského zámeru a nasleduje ďalej túto motiváciu. V iných krajinách je vnímanie tohto pojmu rozdielne.

V súčasnosti poníma Z generácia pojem podnikateľa ako nezávislého pracovníka, ktorý pracuje na rôznych úlohách v rôznych spoločnostiach (Hejnová, 2016).

Požiadavky a nároky zamestnávateľov na pracovnú silu sa zmenili, a aj vzrástli. Tak napríklad kvalitné plnenie pracovných úloh, schopnosť prispôbiť sa, schopnosť samo štúdia, rozvinutosť priemerných kompetencií - sú čím ďalej tým dôležitejšie. Nezávisle od profesijných oblastí vyžadujú zamestnávatelia pracovnú silu ktorá bude vedieť spolupracovať, bude komunikatívna, organizačná, učenlivá a adaptívna. Zmeny, ktoré je možné sledovať na trhu práce, umiestnili dlhodobo do popredia vlastnosti emočnej inteligencie, sociálnej kultúry, a tvorivosti (Szádvári, 2011). Na zmeny, ktoré sa na trhu práce prejavujú, musí reagovať aj systém vzdelávania. Okrem odborných znalostí je z pohľadu vzdelávacích inštitúcií potrebné vybaviť potenciálnych zamestnancov tak, aby boli schopní prispôbiť sa pracovným podmienkam a nepretržitému rozvoju bez ohľadu na odbornú úroveň profesie. V súčasnosti však významná časť čerstvých absolventov nedisponuje trhom požadovanými zručnosťami (Makó, 2015). Pre vedomé hľadanie práce potenciálnych mladých zamestnancov je dôležité, aby sa sústredili na vlastnú dispozíciu ľudského zdroja - dosiahnutého vzdelania, zručností, vedomostí, skúseností, osobných kvalít a záujmov. Je potrebné ujasniť si, aké sú očakávania potenciálnych zamestnancov zo strany zamestnávateľov. Či si to niektorí uvedomujeme viac či menej, v každom zamestnancovi je prítomné určité očakávanie vo vzťahu k budúcej práci, pracovnej pozícii či k pracovnému kolektívu. Očakávania sa tak môžu vzťahovať na charakter práce, na podmienky práce, na kolegov, vedúcich zamestnancov, pracovnú atmosféru - ako aj na mzdu, voľný čas či iné výhody. Patrí sem taktiež aj možnosť ďalšieho vzdelávania, možnosť kariérneho postupu, rôznorodá práca, odhalenie kreatívneho a inovatívneho „ducha“ - teda všetky také očakávania potenciálneho zamestnanca, ktoré môžu byť dôležité a rozhodujúce. Úvaha o ľudských zdrojoch a očakávaniach vedie následne k rozhodnutiu - ktoré sú tie reálne pracovné pozície a zamestnania, o ktoré sa môže kandidát skutočne uchádzať. Premyslenie uvedených bodov zohráva mnohokrát v procese voľby vhodnej profesie najťažšiu úlohu. Bez tejto podmienky však proces hľadania práce môže zostať len túžbou, po ktorej sa môžu objaviť sklamanie (Csehne, 2015). K najcharakteristickejšími črtám Z generácie sa v nadväznosti na pracovné preferencie zaraďuje päť dôležitých kritérií: plat, pracovná sebadôvera, pracovné uspokojenie, práca v tíme, v ktorom sa členovia cítia príjemne a finančná stabilita (Hejnová, 2016).

Materiál a metódy

Prieskum sa realizoval v Maďarsku na Univerzite Sv. Štefana v Gödöllő prostredníctvom techniky dotazníka na vzorke 112 respondentov, ktorí predstavovali Z generáciu Fakulty ekonomiky a spoločenských vied. Prieskumom sme sa zamerali na zhodnotenie zámerov a očakávaní vysokoškolských študentov Z generácie vo vzťahu k trhu práce a k pracovným miestam.

Dotazník pozostával z dvoch častí:

- všeobecná časť, ktorá sa okrem demografických údajov zamerala na charakteristiky súčasného stavu (status študenta) ako - jazykové znalosti, pracovné skúsenosti, zamestnanie,
- špecifická časť, ktorá sa zamerala na konkrétne oblasti budúcich preferencií zamestnanosti.

V prieskume boli aplikované uzatvorené otázky, na ktoré respondenti odpovedali on-line spôsobom.

Vzhľadom na skutočnosť, že Z generácia sa predstavuje v pomerne v malom množstve vo vysokoškolskom vzdelávaní, veľkosť skupiny respondentov môže v absolútnom vyjadrení pôsobiť ako malá vzorka, avšak proporčnosťou pokryla takmer tri štvrtiny celej skúmanej komunity. Spracovanie výsledkov sa realizovalo pomocou jednoduchých štatistických metód.

Hypotéza viažuca sa k výskumu - podľa ktorej sa prejavujú generačné charakteristiky študentov aj v procese hľadania zamestnania a práve to zapríčiňuje, že sú zorientovaní a pripravení, čiže majú reálne predstavy o zamestnaní sa - sa potvrdila len čiastočne.

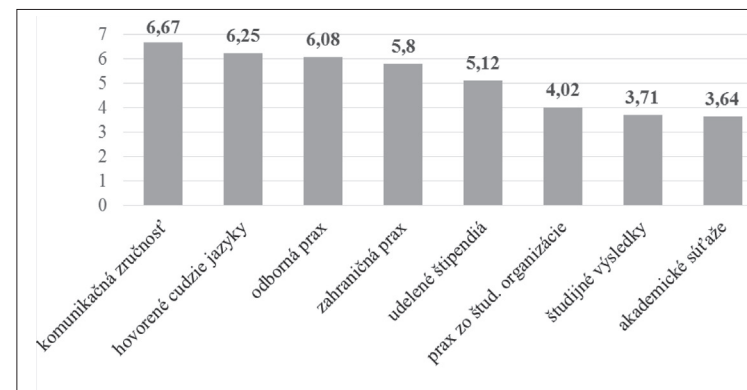
Pomer pohlavia respondentov bol tvorený 23% podielom mužov a 77% podielom žien. 19% respondentov neabsolvovalo jazykovú skúšku, 81% jazykovú skúšku absolvovalo - z toho 3% disponujú základnými cudzojazyčnými zručnosťami, 5% vyššími cudzojazyčnými zručnosťami a 92% strednými cudzojazyčnými zručnosťami. Väčšina cudzojazyčných skúšok predstavuje anglický respektíve nemecký jazyk.

Výsledky a diskusia

Prieskum sa v rámci pripravenosti študentov na pracovné očakávania zameral na tri faktory: či majú pracovné skúsenosti, jazykové schopnosti a medzinárodné skúsenosti. Najviac respondentov absolvovalo resp. absolvuje len povinnú odbornú prax. Okrem tejto skupiny absolvovalo resp. absolvuje podnikovú prax v rámci programu 27 respondentov (24%). 24 respondentov (21,5%) zatiaľ nemá vôbec pracovné skúsenosti. 21 respondentov pracovalo resp. pracuje v študentských organizáciách, čo predstavuje len 19% všetkých respondentov. Len 4 respondenti (3,5%) pracuje kontinuálne od začiatku ich vysokoškolských štúdií. Z celkového počtu 112 opýtaných pracuje resp. pracovalo len 52 študentov dobrovoľne, čiže nie v rámci povinnej odbornej praxe. Z pohľadu jazykových kompetencií 91% respondentov hovorí jedným, alebo viacerými jazykmi okrem materinského jazyka. Celkom len 10 respondentov (9%) nehovorí iným, než materinským jazykom, 34% opýtaných je schopných komunikovať viacerými cudzími jazykmi. Otázky týkajúce sa medzinárodných skúseností zahŕňali znalosť cudzieho jazyka a pracovnú skúsenosť v zahraničí (odbornú i neodbornú). Zo 112 študentov 37 (33%) žilo dlhšie v zahraničí z dôvodu práce, alebo štúdia. 75 študentov (67%) nemá žiadne zahraničné skúsenosti.

Význam faktorov pri hľadaní zamestnania zoradili respondenti na Likertovej škále od 1 do 7. Výsledky zistení prezentuje graf 1., podľa ktorého respondenti zhodnotili ako najdôležitejšiu v procese hľadania si zamestnania - komunikačnú schopnosť, nasledovali schopnosť komunikovať v cudzom jazyku a odborné skúsenosti. Ako najmenej dôležité faktory boli identifikované: skúsenosti získané v študentských organizáciách, študijné výsledky a účasť na akademických súťažiach. Posledné dva uvedené faktory zhodnotili respondenti prekvapivo nízko.

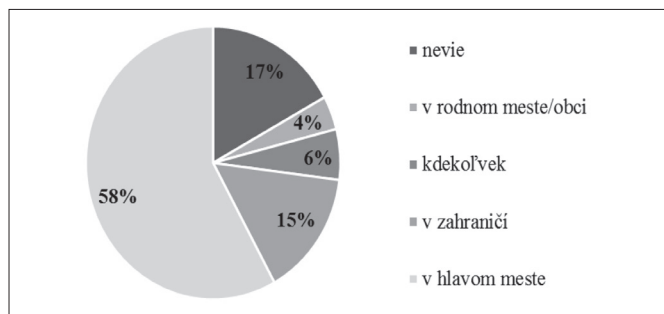
Graf 1 Najdôležitejšie faktory v procese hľadania zamestnania podľa Likertovej škály od 1 do 7 (n=112)



Práveň: primárny prieskum, vlastné spracovanie

Takmer polovica respondentov (47%) plánuje po záverečnej skúške ďalej študovať a pracovať, 28% plánuje len pracovať, a 19% má výhradne plány s ďalším štúdiom. Tri štvrtiny respondentov by sa chcelo zamestnať vo vlastnom odbore, len 25% opýtaných vyjadrilo možnosť uchádzať sa o zamestnanie v inom odbore. Predstavy študentov súvisiace so zamestnaním sa sú znázornené v rámci grafu 2, ktorý poskytuje jednoznačný geografický obraz, v ktorom 58% opýtaných by sa chcelo zamestnať v Budapešti. Špecifiká tejto generácie boli menej dominantné vo vzťahu k plánom zamestnať sa v zahraničí, keďže len 15% opýtaných by chcelo pracovať v zahraničí. Je zároveň prítomný veľmi nízky pomer (4%) tých, ktorí sa plánujú po štúdiu vrátiť do ich rodného miesta.

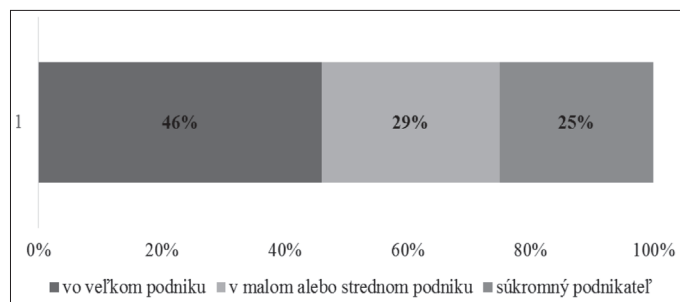
Graf 2: Geografické umiestnenie očakávaného zamestnania (%) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

Čo sa týka veľkosti skupiny budúcich zamestnancov – v skupine respondentov sa vyníma počet tých, ktorí preferujú jednoznačne prácu v nadnárodných veľkých podnikoch (46%). Stredné podniky preferovalo 29% a súkromné spoločnosti 25% opýtaných (Graf 3).

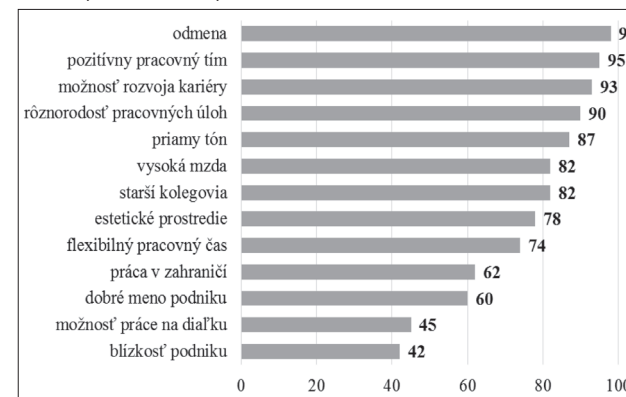
Graf 3: Forma korporácie očakávaného zamestnania (%) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

Nároky respondentov na zamestnanie sú v súlade s ich s rýchlymi, neustále sa meniacimi nárokmi. Nie je preto prekvapujúcim zistením, že v súvislosti s ich preferenciami sa objavuje na prvom mieste odmeňovanie (98%), nasleduje preferencia šťastného – pozitívneho pracovného tímu (95%) a príležitosť kariérneho rastu (93%). V tomto prípade sa potvrdzuje, že pracovné hodnoty opýtaných sa zhodujú so všeobecnými charakteristikami Z generácie: výnimočné miesto zastáva kariérny rast, rozmanitosť pracovných úloh a odmeňovanie. Zároveň sa výrazne neprejavili požiadavky na flexibilný pracovný čas a možnosť pracovať v zahraničí (Graf 4).

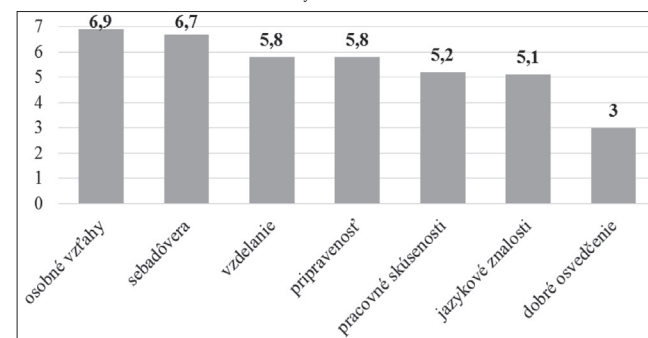
Graf 4: Dôležitosť požiadaviek respondentov vo vzťahu k budúcemu zamestnaniu (%) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

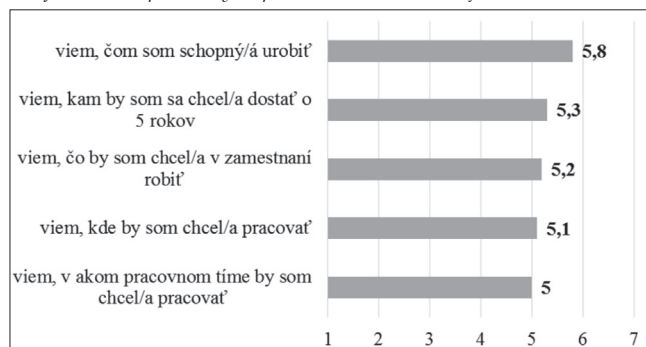
V rámci ďalšieho prieskumu sme sa pomocou Likertovej škály (1-7) zamerali na faktory, ktoré sú rozhodujúcimi podmienkami pre dobré zamestnanie sa. Výsledky zisťovania prezentuje Graf 5. Dosiahnuté výsledky potvrdzujú existujúce trendy, s ktorými sa v súvislosti s kariérou najčastejšie stretávame: na prvom mieste sa objavujú osobné vzťahy. Aj v tomto aspekte sa prejavujú charakteristiky generácie: v postojoch respondentov sa objavuje dôležitosť sebavedomia, ktorá sa dostáva pred význam profesionalitu. Graf 6 znázorňuje myšlienky súvisiace s budúcimi plánmi respondentov. Výsledky ilustrujú 'imidžové' charakteristiky Z generácie: častokrát disponujú vyšším než reálnym sebavedomím, čo však nie je vytvorené skutočnou, prepracovanou prácou sebapoznania. Vízia respondentov je oveľa menej stabilná, než ich sebavedomie: vedľa menej o tom – kde, v akom pracovnom prostredí by chceli pracovať, a kam by sa v tomto smere chceli dostať v intervale piatich rokov.

Graf 5: Umiestnenie vnímaných faktorov zaisťujúcich dobré zamestnanie na Likertovej škále (1-7) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

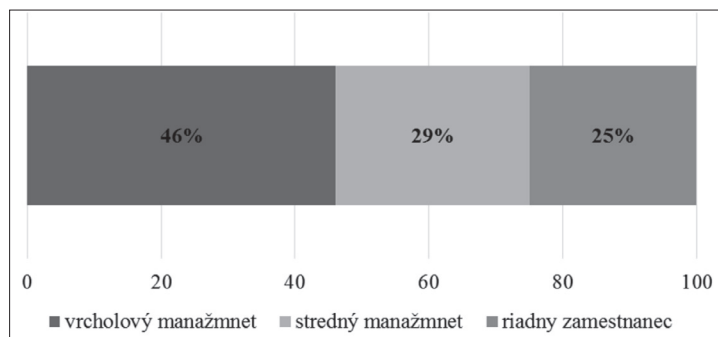
Graf 6: Budúce predstavy respondentov na Likertovej škále (1-7) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

Predstavy o pracovnom zaradení znázorňuje graf 7. Podľa zistení 46% opýtaných má predstavy o zamestnaní sa v rámci vrcholového manažmentu, 29% v rámci stredného manažmentu a len 25% sa uspokojí so statusom podriadeného zamestnanca. Uvedený obraz o budúcej situácii na trhu práce nie je v súlade s realitou na maďarskom trhu práce.

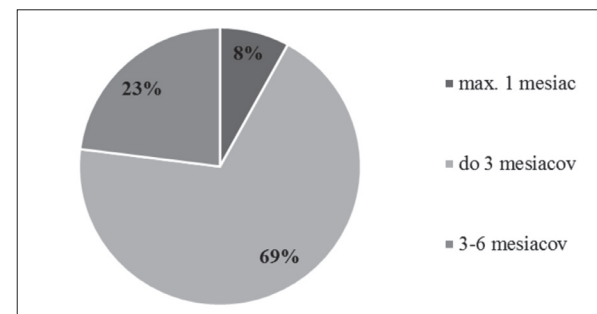
Graf 7: Predstavy respondentov o pracovnom zaradení (%) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

Predstavy respondentov o časovom intervale potrebnom pre nájdenie si zamestnania možno zhodnotiť ako optimistické. Prevažná časť (69%) očakáva maximálne 3 mesiace pre nájdenie si zamestnania, reálne očakávania kalkulujúce až s polročným obdobím má len 23% opýtaných. 8% respondentov predstavuje skupinu prílišných optimistov keď očakávajú, že sa zamestnajú do 1 mesiaca (Graf 8). Na maďarskom trhu práce sa pohybuje dĺžka času potrebného pre nájdenie si zamestnania vysokoškolsky vzdelaných absolventov na úrovni 5,4 mesiaca.

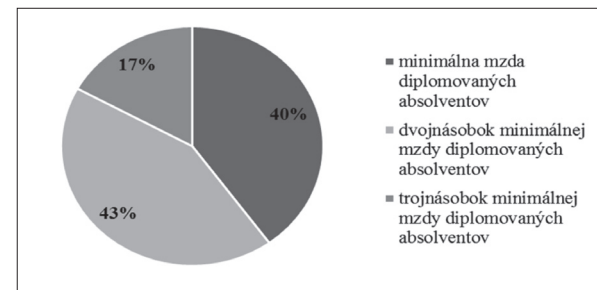
Graf 8: Respondentmi predpokladaná dĺžka času pre nájdenie si zamestnania (%) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

V nadväznosti na platové nároky respondentov možno pozorovať opätovne charakteristické ambiciózne prejavy tejto generácie: 60% respondentov označilo možnosť zárobku v rámci ich prvého zamestnania vo výške 2-3 násobku minimálnej mzdy diplomovaných absolventov. Len 40% poskytlo reálne zhodnotenie situácie – počítajú s výškou minimálnej mzdy pre diplomovaných absolventov (Graf 9).

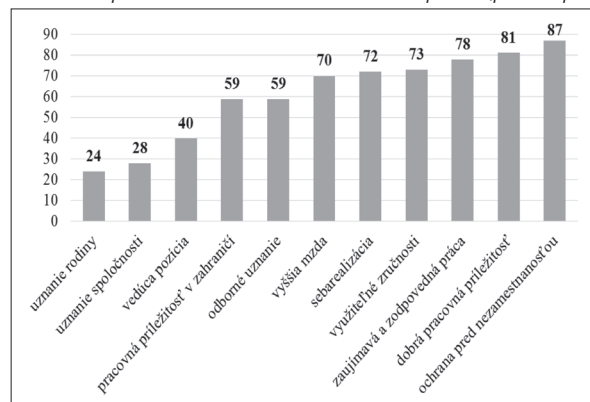
Graf 9: Predstavy respondentov o výške prvého zárobku vo vzťahu k minimálnej mzde diplomovaných absolventov (%) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

Znázornenie v rámci grafu 10 poskytuje zistenia v súvislosti s očakávaniami respondentov po získaní vysokoškolského diplomu. Otázky týkajúce sa tejto oblasti poskytovali respondentom možnosť voľby viacerých odpovedí. Z odpovedí vyplýva, že ochrana proti nezamestnanosti sa stáva dôležitým momentom (87 odpovedí). Nasledujú kvalitné pracovné miesta (81 odpovedí) a zaujímavé – zodpovedné pracovné miesta (78 odpovedí). K dôležitým očakávaniam sa zaradili taktiež využiteľnosť znalostí (73 odpovedí), sebarealizácia (72 odpovedí) a vyššia mzda (70 odpovedí). V celkovom poradí sa v poslednej tretine nachádzajú: odborné uznanie (59 odpovedí) a možnosť zamestnania sa v zahraničí (59 odpovedí). K najmenej dôležitým očakávaniam zaradili respondenti spoločenské (28 odpovedí) a rodinné uznanie (24 odpovedí).

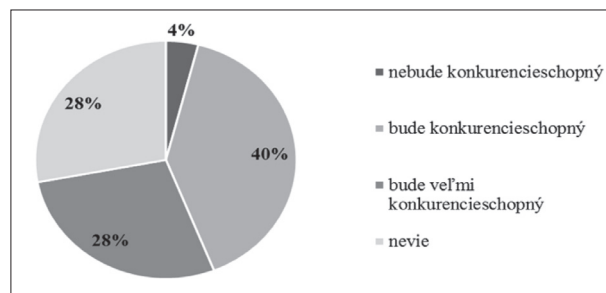
Graf 10: Očakávania respondentov vo vzťahu k získanému diplomu (počet odpovedí) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

40% opýtaných optimisticky považuje svoju perspektívnu kvalifikáciu za konkurencieschopnú (graf 11). Veľmi pozitívne presvedčenie vo vzťahu k svojej profesijnej kvalifikácii prejavilo 28% opýtaných, rovnaký podiel opýtaných nevedelo na túto otázku odpovedať. Uvedené zistenie poukazuje na nevedomosť o trhu práce a na fakt, že študenti nie sú v tejto oblasti dostatočne zorientovaní. Len 4% opýtaných považuje svoju profesijnú kvalifikáciu za nekonkurencieschopnú. Väčšina respondentov teda pravdepodobne dokáže odhadnúť svoju trhovú profesijnú hodnotu, alebo dopyt po ich kvalifikácii.

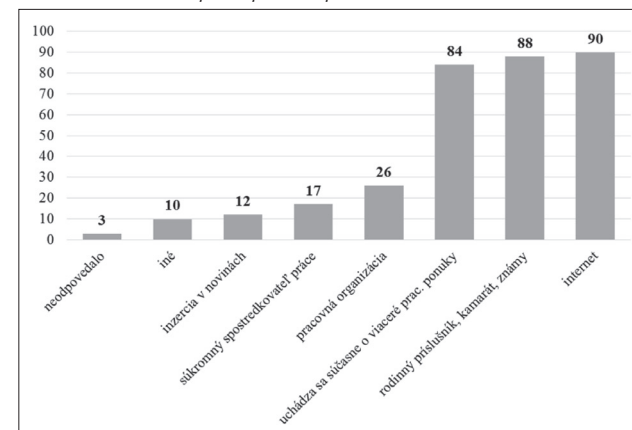
Graf 11: Predstavy študentov o dopyte na trhu práce (%) (n=112)



Prameň: primárny prieskum, vlastné spracovanie

Pokiaľ ide o kanály hľadania zamestnania – predpokladaným spôsobom – mladá generácia považuje za prvotný informačný zdroj internet (90), nasleduje pomoc prostredníctvom známych a rodinných príslušníkov cez súčasne viac kanálov (88) a uchádzanie sa o viac pracovných pozícií (84). Výsledky zobrazené prostredníctvom Grafu 12 sú v súlade s charakteristikami generácie.

Graf 12: Predstavy respondentov o spôsoboch hľadania zamestnania podľa počtu odpovedí (n=112)



Prameň: primárny prieskum, vlastné spracovanie

Záver

V skúmanej vzorke respondentov sa potvrdili charakteristické ambície Z generácie (študovali by popri práci, v hlavnom meste krajiny a preferujú nadnárodné veľké korporácie), ako aj vyššie než reálne očakávania (dĺžka hľadania zamestnania, mzdové požiadavky, vytúžená pozícia). Uvedené zistenie sa javí ako prekvapivé, keďže poukazuje na nezorientovanie sa na trhu práce.

Charakteristikou Z generácie je aj preferovanie práce v zahraničí, čo sa však na vzorke respondentov prejavilo len podpriemerne. Medzi faktory, ktoré sú nevyhnutné pre hľadanie zamestnania, zaraďujú prioritne sebavedomie a vzťahy, až po nich pripisujú dôležitosť odbornej pripravenosti. Zároveň disponujú vyššou mierou sebavedomia, než je stabilita ich predstáv o odbornosti ich zamestnania. Majú plány, ciele, očakávania, avšak povedomie nie je pre nich typické. Súčasný trendy na trhu práce, ktorým táto generácia bude čeliť, sa vyznačujú najmä dlhším obdobím pre hľadanie práce, viacnásobným zlyhaním a menej motivujúcim začiatkom kariéry – v porovnaní s očakávaniami tejto generácie. Podľa výsledkov prieskumu je zjavné, že voľba povolania a hľadanie zamestnania sú neodmysliteľnými súčasťami procesu, ako aj hľadanie informácií o trhu práce v rámci osobnej prípravy. Tak došlo k potvrdeniu základného predpokladu len sčasti. Prieskum tiež dospeš k záveru, že možno odporučiť zvýšenie miery informovanosti o trhu práce už na stredných školách s ohľadom na súčasný stav trhu práce, zvýšiť je potrebné tiež informovanosť o tom, do akej miery sú určité profesie presýtené, ako aj o tom, aké sú požiadavky trhu práce vo vzťahu ku kompetenciám uchádzačov. Cieľom nie je poskytnúť detailný obraz o aktuálnom trhu práce, ale naučiť mladých uchádzačov orientovať sa na regionálnej či štátnej úrovni v chýbajúcich profesiách, informovať ich o miere pre-vzdelanosti, o zastaraných

profesiách, ako aj o nových programoch. Tak je možné zabezpečiť ich potrebnú informovanosť pre ich neskoršie zamestnanie sa. Je potrebné upozorniť mladú generáciu na to, že je dôležité pripraviť sa na zamestnanie, je potrebné informovať sa pred prijatím rozhodnutia, ktoré by malo byť odôvodnené, aby dokázali úspešne dosiahnuť svoj cieľ. Je potrebné zdôrazňovať, že v súčasnosti je neodmysliteľnou súčasťou celoživotné vzdelávanie, ako aj adaptabilita k dynamicky sa rozvíjajúcemu trhu práce.

Potreba povedomia o trhu práce bude zrejme pre Z generáciu dôležitejšou realitou už v blízkej budúcnosti, preto je potrebné poskytnúť im návod v tomto smere. Preskúmanie tejto situácie vyústilo do potreby posilniť komplexné poradenské služby, ktoré by obsahovali posilnenie sebauvedomenia a rozvoj profesionálnych zručností. Uvedené zistenie je dôležité vo vzťahu k Z generácii z pohľadu, aby sa docielilo vybudovanie sebavedomia tejto generácie na báze skutočného sebazpoznania, ako aj vybudovanie bázy aktuálnych trendov a očakávaní na trhu práce, na základe ktorých by si táto generácia mohla tvoriť budúce plány ich zamestnania. Pohľad, z ktorého je možné tieto zistenia dosiahnuť, je založený na neustálom on-line prepojení tejto generácie prostredníctvom informačných a komunikačných technológií, preto je potrebné sústrediť sa nato, aby sme smerovali ponuky, služby „tam“ kde sa študenti tejto generácie „nachádzajú“.

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HATÉKONY VEZETÉSI STÍLUS

EFFECTIVE LEADERSHIP STYLE

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Abstract

The leadership and organisational behaviour become one of the key topics of corporate life. The objectives have become increasingly important for workers, taking into account its own scale of values and motivational factor for managers. It has become a very important factor, then, that the leaders do their power, but rather to introduce a behaviour, which puts thereby generating confidence, access to effective leadership is designated the interests of employees. The article provides an overview of leadership theories set out in the literature and cultural differences also deals. We find the answer to what makes a management style is effective and that the difficulties facing the leaders of different cultural backgrounds individuals.

Key words: *management, leadership, motivation, cultural differences*

Absztrakt

A vezetés és a kultúra napjaink egyik kulcstémája a vállalati életben. Egyre fontosabbá váltak a munkavállalók céljai, saját értékrendjük és motivációs tényezőik figyelembe vétele, megnevezve ezzel a vezetők mindennapjait. Nagyon fontos tényező lett tehát, hogy a vezetők ne hatalmukkal, hanem sokkal inkább olyan magatartással vezessenek, mely az alkalmazottak érdekeit helyezi előtérbe és ezzel bizalmat generálva, elérhetik a hatékony vezető megnevezést. A cikk áttekintést nyújt a szakirodalom által meghatározott leadership elméletekről, valamint a kulturális különbségekkel is foglalkozik. Arra keresi a választ, hogy mitől lesz egy vezetési stílus hatékony és, hogy milyen nehézségekkel néznek szembe a vezetők eltérő kulturális háttérű egyéneknél.

Kulcsszavak: *vezetés, leadership, motiváció, kulturális különbség*

JEL Classification: J53, M12, M54

Bevezetés

A mai vezetéstudomány, ha különböző megnevezések alatt is, de már fellelhető Mózes törvénykönyvében, több évezredes kínai iratokban, Platón szerzeményeiben. Sumér papok által konstruált írásokban, melyek Kr.e. 5000 évvel késültek, már találunk utalásokat különböző vezetési technikákra. (Klein, 2002) Euripidész, görög tragédiaköltő, így ír: „... Vakmerő vezér könnyen bukik...” (Klein, 2002, 34.o.) Seneca a híres költő, aki Kr.e. 4-ben született így vélekedik: „... úgy viselkedj alárendeltteddel, ahogyan szeretnéd, hogy fölfebbvalód viselkedjen veled.” (Klein, 2002, 33.o)

A vezetés önálló tudományág, feltehetően az emberi történelemmel született egyszerre. (Klein 2002)

A vezetés fogalmáról Lussier és Achua úgy vélekedik, hogy a vezetés egy befolyásolási folyamat a vezetők és a vezetettek között, amelynek feladata a szervezeti célok elérése változásokon keresztül. Tehát a vezető az a személy, aki képes befolyásolni másokat. (Lussier – Achua, 2012)

A hatalom nem más, mint a saját célok elérésének képessége. Hatalom által megvalósított célérés nincs tekintettel a másokra. A beosztotti hozzáállás befolyásolására a hatalom nagyon erőteljes vezetői eszköz, csak hogy motivációs hatása a dolgozókra minimális vagy éppenséggel negatív. Ennek okán vezetői szempontból nézve fontos, hogy a hatalmi eszközök alkalmazása helyett a munkatársak céljait, motivációit figyelembe vevő vezetői magatartást alkalmazzák a vezetők. A szakirodalom által leadershipnek definiált magatartási jelenségnek egyik legfontosabb jellemzője pont ez: híd építeni a szervezeti és az egyéni célok között. A leadership a vezetői tevékenység azon eleme, mely a szervezeti erőforrások közül kimagaslóan az emberi erőforrásokkal foglalkozik, valamint annak a rátermettségét jelenti, hogy miként tudja a vezető a szervezet tagjait a szervezeti célkitűzések megvalósítására befolyásolni, mozgósítani. A leadership lényege pont abban található, hogy miként tudja a vezető saját és beosztottjai értékeit, motivációit felismerni, összekapcsolni, s miként képes ennek megfelelően tevékenykedni. A leadership és a nyers hatalomgyakorlás között a különbség az, hogy a leadership elválaszthatatlan a követők céljaitól, szükségleteitől. (Bakacsi, 2004), (Schermerhorn – Hunt – Osborn, 2003)

Leadership elméletek

Tulajdonságelméleti megközelítés

A vezetői tulajdonságokat előtérbe helyező irányzat a legkülönbébb tulajdonságok elemzésével próbálta feltárni a sikeres vezetők jellemvonásait. (Heidrich, 2013, online)

A vezetői tulajdonságon nyugvó elméletek meghatározták, hogy milyen képességekkel, tulajdonságokkal rendelkezzenek azok az egyének, akik vezetővé váltak és sikeresek szeretnének lenni. Ezek a következők: intellektuális készségek, vállalkozói készségek, szoció- emocionális készségek, interperszonális készségek. (Bencsik, 2008)

Magatartástudományi megközelítés

A magatartási alapú megközelítés két nagyobb vonalát ismerjük: a döntéshozatal módján és a vezető személyiségén alapuló irányzatokat.

Döntésközpontú leadership-elméletek: azok az elméletek sorolhatók a döntésközpontú irányzat közé, amelyek a vezetési stílusokat a döntéshozatal módja szerint tipologizálják. Azzal foglalkoznak, hogy hogyan hozzák meg a vezetők a döntéseiket, egyedül, vagy demokratikusan. Ezen felül még azt vizsgálják, hogy a vezetők milyen fokú részvételt engednek meg beosztottaiknak a döntéshozatalban. (Bakacsi, 2004), (Bencsik, 2008)

Kurt Lewin kísérletei: Kurt Lewin, német- amerikai pszichológus gyermekekkel végzett klasszikus kísérlete három vezetési stílust tanulmányozott. Ezek a következők:

- „tekintélyelvű (autokratikus) vezetési stílus
- demokratikus vezetési stílus
- megengedő (laissezfaire) vezetési stílus” (Dobák – Antal, 2010, 371. o.)

A kísérletek folyamán azt vizsgálták, hogy a különféle vezetési stílusok hatására miként alakul a csoport teljesítménye. (Dobák – Antal, 2010), (Rókuszfalvy, 1998)

Vezetői magatartáson alapuló személyiségközpontú leadership- elméletek: azok az elméletek nevezhetők személyiségközpontú elméletnek, amelyeknél az alábbi jellegzetességek felfedezhetők: a vezető személyisége, személyiségjegyei, figyelmének orientáltsága. Az irányultság két irányú lehet: a vezető a feladatra (csoportjának produktivitására), vagy a munkatársaival való kiváló kapcsolat létesítésére koncentrál. Ebbe a csoportba sorolható A Michigani Egyetem modellje valamint Az Ohioi Állami Egyetem modellje is. A két modell nagyon hasonló. A Michigani Egyetem modellje kétféle vezetési stílust ismer el. Az egyik a feladatcentrikus fellépést tanúsító vezető, aki mereven figyeli beosztottai munkáját, megszabja számukra, hogyan dolgozzanak és mindenekelőtt a teljesítmény foglalkoztatja. A másik stílus a beosztottcentrikus vezetői magatartás, mely sajátosságai közé tartozik az együttműködő csoport megvalósítására való törekvés. Ezt a vezetési stílust képviselő vezető számára fontos, hogy beosztottjai munkájukkal elégedettek legyenek, jól érezzék magukat. (Marshall, Hernandez, 2016) A modellattai akét vezetési stílust egymást kizárónak tekintették, miszerint a vezető vagy feladatcentrikus, vagy beosztottcentrikus. Az Ohioi Állami Egyetem modellje is két vezetési stílust különböztet meg. Az egyik stílus a vezető, akinek stílusára a kezdeményezés-strukturalás a jellemző, aprólékosan szervezi a beosztottak feladatait, előírja számukra, mit és hogyan tegyenek. A másik stílusba azok a figyelem megjelöléssel jellemzett vezetők tartoznak, akik érdeklődést tanúsítanak az alkalmazottak iránt. Meleg, barátságos, bizalomteli, jóakaró légkör kivitelezésére törekszenek.

Az Ohioi Állami Egyetem modelljében a kutatók a vezetési stílusokat nem egymást kizárónak, hanem egymás mellett létezőnek tekintik. (Bakacsi, 2004), (Klein, 2002), (Mihok – Trebuna, 2009), (Řezáč, 2009), (Sedlák, 2009)

Kontingencia- elméleti megközelítés

A kontingencia elmélet túllép a minden körülmények között tanácsolt vezetési stílus felfogáson. Ez az elmélet a vezető stílusa és a vezetés feltételrendszere közötti illeszkedés feltételét határozza meg. A kontingencia- modellek közé tartozik Vroom és Yetton normatív modellje, Fiedlerkontingenciaelmélete. (Bakacsi, 2004)

Vroom és Yetton normatív modellje

A modell fő célkitűzése az, hogy segítsen meghatározni azt, hogy szükséges-e, hogy a vezető beavassa a beosztottakat a döntésekbe. Azt a döntést tekinti hatékonynak, amely megalapozott és eléri a célját. A hatékony döntési stílust a vezető úgy érheti el, ha elemzi a döntési szituációt, és ennek alapján kiválasztja a legideálisabb stílust. (Klein, 2002), (Letovancová, 2002)

Fiedlerkontingencia-modellje

Fiedlerkontingencia- modelljének alapfeltevése az, hogy különböző vezetési helyzetekben más és más vezetési stílusok hatásosak. Kétfajta vezetési stílust ír le:

- feladatorientált vezetési stílus
- kapcsolatorientált vezetési stílus.

Fiedler egy sajátos, ún. legkevésbé kedvelt munkatárs (LKM) teszt használatával sorolja a két típus valamelyikébe a vezetőket.

A teszt kitöltőjének (vezetőnek) azt a munkatársat szükséges jellemeznie, akivel a legkevésbé tudott hatékonyan együtt dolgozni. Feladatorientáltak kvalifikálható az a vezető, akinek nem kedvelt beosztottjáról adott minősítése negatív. Ezzel ellentétben kapcsolatorientált az a vezető, aki részben kedvezően minősíti legkevésbé kedvelt munkatársát.

A két típust egy skála két egymást kizáró végpontjaként érti, tehát a vezető vagy feladatorientált, vagy kapcsolatorientált, átfedést nem feltételez a kettő között. (Bakacsi, 2004), (Blažek, 2011)

Vezetés különböző kultúrákban

A globalizáció újfajta vezetési problémákat alkotott, melynek alapja a kulturális eltérés a munkavállalók és vezetők között. Ezen problémát tovább fokozza a foglalkoztatottak vándorlásának növekedése, a külföldi tőkebefektetések gyarapodása, valamint az üzleti élet globalizálódása. A fent említett tényezők hatására egyre fontosabbá vált a sokszínűség menedzselése. Manapság, egy vezető, ha sikeres akar lenni más országokban, ill. más kultúrákban, akkor meg kell tanulnia megismerni és elfogadni más országok munkavállalóinak nemzeti kultúráját, valamint az abból fakadó viselkedésüket. Amennyiben ezt elsajátítják, a vállalat számára versenyelőnyt kovácsolhatnak.

Funakawa úgy véli, hogy a kulturális sokszínűség eredményes menedzselése kizárólag tudatos vezetési szemléletváltással lehet eredményes. Ezt segíti a szervezet szintjén az ún., „5 kompetencia modell” alkalmazása.

5 kompetencia modell

Geocentrikus gondolkodás - olyan viselkedési forma, amely természetesnek tartja, hogy tanulni mindenkitől lehet és kell is.

Stratégiai szemlélet - A hagyományos vezetési elmélet alapján a stratégia 3 fő eleme, az ún., „3C”, corporation - vállalat, customer - vevő és nem utolsósorban competitor - versenytárs, amelyet Funakawahárom elemmel bővítette ki melyek a következők: community - közösség, communication - kommunikáció, culture - kultúra. Kultúrák közötti kommunikáció-Sikeres kommunikáció akkor jöhet létre a felek között, ha azok törekednek arra, hogy ne megítéljék, hanem megértsék egymást.

Kulturálisan érzékeny vezetési módszerek - Ahhoz, hogy a vezetők az ún. kulturálisan érzékeny vezetési módszert tudják alkalmazni, személyes kompetenciájukat kell kifejleszteniük. A legfontosabbak: széles látókörűség, érzékenységi, kulturális ismeretek, etikus viselkedés, flexibilitás, kitűnő kommunikációs képesség, emberismeret, nyelvtudás.

Állandó szinergikus tanulás - A folyamatos szinergikus tanulás hozzájárul ahhoz, hogy pozitív kulturális szinergia formálódjon ki a cégnél.

A felsorolt öt kompetencia szorosan összefügg egymással. A vállalat akkor érhet el sikereket, ha mind az ötöt kifejleszti. A felsorolt öt vállalati szintű kompetencia kifejlesztéséhez szükséges az is, hogy az egyének a másféle kultúrájú személyekkel való kapcsolatot ne teherként, ne veszélyhelyzetként, hanem egy bizonyos fajtanulási és fejlődési lehetőségként lássák meg (Csath, 2004).

Vizsgálati módszerek

Munkánk célja a szakirodalom által felállított elméletek és modellek a gyakorlatban alkalmazott technikákkal való egyezésének a megbizonyosodása. Célunk az volt, hogy kutatásunkkal meghatározzuk azt, hogy milyen személyiségjegyekkel, képességekkel kell egy hatékony vezetőnek rendelkeznie, amit a hazai és nemzetközi szakirodalom leírásaival is összehasonlítottunk. A fent említett tényezők egyeztetése után igazolhatjuk vagy ellenmondást állapíthatunk meg a szakirodalom állításai és a gyakorlati élet között. Ezen belül célul tűztük ki, hogy pontos meghatározást adjunk arról, hogy milyen vezetési stílus az, ami a leghatékonyabb a gyakorlatban. A terület neves képviselői kutatás által alátámasztották, hogy az autokratikus vezetői stílus a leghatékonyabb, ám közel sem biztos, hogy a legjobb. Kutatásunkban nagy hangsúlyt fektettünk ezen állításunk alátámasztásának-illetve megcáfolásának érdekében. Ezen felül, fontosnak tartottuk annak feltárását, hogy meghatározzuk azoknak a tényezőknek a megjelenését, amelyek cselekvésre sarkalják, tehát motiválják a vezetőket és beosztottaikat egyaránt.

Mai globalizált világunkban nem hagyhattuk figyelmen kívül a kultúrák hatását a vezetésre. Multinacionális vállalatok körében mára már hétköznapivá vált a kultúrák sorozatának megjelenése a dolgozók mindennapjaiban. A legtöbb vállalat ma már nagy hangsúlyt fektet arra, hogy megfelelő oktatást és információt nyújtson

alkalmazottainak a kulturális különbségek meglétéről, fontosságáról és kezeléséről. Ennek függvényében fontosnak tartottuk azt is megvizsgálni, hogy milyen hatással van a vezetésre az, ha különböző kulturális háttérrel rendelkező egyének dolgoznak, tárgyalnak együtt. Szerettük volna felmérni az ezekből származó esetleges konfliktusok lehetőségét, valamint tapasztalt vezetők nyilatkozata alapján megfelelő képet nyújtani arról, hogy a gyakorlati életben ők ezt miként alkalmazzák, és milyen versenyelőnyt tudnak kovácsolni abból, s hogy kezelik a kulturális különbségeket. A szakirodalom állítása alapján igaz az, hogy a velünk szembenálló egyén kulturális háttérének ismerete nélkül nem tudunk hatékonyan együtt dolgozni. Kutatásunk során ezt szeretnénk bebizonyítani vagy épp megcáfolni.

A kutatás által megfelelő képet tudtunk nyújtani arról, hogy kit nevezhetünk hatékony vezetőnek.

Munkánk kétféle kutatáson alapult. Egyaránt épült primer- és szekunder adatokra is. Az elméleti háttér kidolgozásához szekunder adatokat használtunk, melyeket külső forrásokból gyűjtöttünk össze. Ezek tanulmányozása után kiválasztottuk a számunkra legmegfelelőbbeket. (Pasztores, 2001)

A primer kutatás keretein belül kvalitatív adatokkal dolgozunk. A kutatásra jellemző, hogy kis mintán alapul. Munkánk kutatásához egyéni mélyinterjút használtunk, amely egy kétszemélyes beszélgetésen alapult az összes általunk kiválasztott vezetővel. (Kiss, 2005) Az interjú a két fél között előre egyeztetett vezérfonal alapján zajlott. Sok nyitott kérdés volt, ami hozzájárult ahhoz, hogy a válaszadó szavakba öntse gondolatait, kifejtse indítékait. (Kiss, 2004)

Kutatás főbb eredményei

A kutatása a hatékony vezetési stílus feltárására irányult. A kutatás megvalapozásához hat különböző személyiségű, különböző iparágban és különböző területen működő vezető tapasztalatait és véleményét használtuk fel. A vezetőket igyekeztünk úgy megválasztani, hogy eltérő vállalati kulturális háttérrel rendelkezzenek, ami sikerült is. Egyes vezetők, japán kulturális hatterű cégeket képviselnek, más vezetők olyan vállalatot képviselnek, akik európai vállalati kultúrával rendelkeznek és nem utolsó sorban egy amerikai vállalati kultúrával rendelkező vállalat vezetőjével is sikerült interjút készítenünk. Azért tartottuk fontosnak azt, hogy több kulturális hatterű vezetővel készítsünk interjút, mivel úgy gondoltuk, hogy kutatásunk csak ezen tényezők figyelembe vételével tud releváns képet mutatni, hiszen a különböző kultúrák jelenléte egyre nagyobb szerepet tölt be a vállalati életben. Kutatásunk célja nem az volt, hogy elméleti szinten vizsgáljuk meg az általunk kiválasztott témát, így olyan vezetőkkel készítettünk mélyinterjút, akik több éves vezetői tapasztalattal rendelkeznek. Tisztelegés és szavahihető vezetőnek tartják magukat.

A mélyinterjúk kezdetekor mindegyik vezetővel rögzítettünk egy definíciót arról, hogy ők mit értenek az alatt, hogy vezetés. Úgy gondoljuk, hogy a vezetők meglátása kiváló volt az általuk ismertett meghatározások összevonnásával, egy kerek egész kaptunk az említett kérdéskörrel. Ez alapján a vezetés nem más, mint a

cégtulajdonos rendelkezései, valamint alapelvei mintájára irányítani és folyamatosan működtetni a társaságot. Ehhez tervezni, szervezni, irányítani és motiválni kell a csapatot annak érdekében, hogy a kitűzött célokat el tudjuk érni és ezáltal a vállalat működését maximálisan bebiztosítsuk, ezenfelül teljesíteni kell azokat az igényeket, amit bevállaltunk.

Munkánk első felében a szakirodalmi források alapján vázoltuk azt, hogy kit nevezhetünk hatékony vezetőnek. Az interjú elkészítése során megfigyeltük, hogy a fontos vezetői tulajdonságokra, személyiségjegyekre minden vezető mást és mást mondott, amiből arra következtettünk, hogy egy hatékony vezetőnek nagyon sok tulajdonsággal kell rendelkeznie ahhoz, hogy elnyerhesse ezt a címet. A szakirodalom is nagyon tág képet adott ezekről a tulajdonságokról, azonban a tulajdonságok listája csak akkor lehet teljes, ha kibővítjük az interjú során szerzett ismereteinkkel. Ezek tudatában elmondhatjuk, hogy hatékony vezető az, aki a következő tulajdonságoknak birtokában van. Elsősorban fontos, hogy rendszeresen kommunikálja a jövőképet, elvárásokat, célokat és prioritásokat. A vizionálás mellett a végrehajtást is magáénak tekinti. Bizalmat sugároz beosztottai felé, feladatokat és döntéseket delegál, nem egyedül próbál minden fontos dolgot megoldani. Munkatársait arra ösztönzi, hogy véleményt alkossanak, és cselekedjenek. Meghallgat másokat. Elfogadja a hibázás lehetőségét, azonban csak akkor, ha úgy gondolja, hogy abból tanult az illető, és máskor nem ismétli meg. Munkája nem áll meg a feladatok kiosztásával, meg kell találnia azt a folyamatot, ahogy segítheti a munkavégzést. Rendszeresen megbeszéléseket szervez, ahol az aktuális helyzetet megvitatja, támaszt biztosít. Visszajelzést ad és kér. A pozitív és negatív visszacsatolás egészséges arányát fenntartja. Ismeri munkatársait, ezáltal tisztában van azzal, hogy mi hajtja őket. Mindenkinek személyre szabott motivációs rendszert állít föl. Érzékeny másokra, érdeklődését mutatja a beosztott, mint ember iránt. Ez nem azt jelenti, hogy puhány. Minden irányba utat enged a szervezeti információáramlásnak. Ha szükség van rá, vállalja a konfrontációt. Nem hanyagolja el kapcsolatait a szervezeten belül és kívül. A jó vezető rugalmas, gyors helyzet felismerési és döntéshozatali képességgel rendelkezik, mellőzi az érzelmi alapon történő döntéshozatalt. Nem utolsó sorban nagyon fontos, hogy a vezető szakmailag kiváló legyen, tehát az adott területen kimagasló ismeretekkel rendelkezzen. Legyen következetes, tárgyilagos. Zárószóként elmondható, hogy mindig a vállalat érdekeit képviseli és jól ismeri a szervezet kultúráját.

Folyóiratokban olvashatjuk, hogy jó vezető csak az lehet, aki a vállalati hierarchia több fokát végigjárja, mielőtt vezetővé válik. Interjúalanyainkról elmondható, hogy karrierjüket fokozatosan építették fel a vállalati hierarchia több fokát végigjárva. Elmondásuk alapján arra következtettünk, hogy nagyon fontos, hogy egy vezető mielőtt vezetővé válik, a ranglétra több fokát megismerje, végigjárja. Ha sikeres vezetővé szeretnénk válni, akkor meg kell tanulni vezetni, még mielőtt vezetői pozícióba kerülünk. Az egyik interjúalany elmondása szerint a vezetést a lövészárokban lehet megtanulni. Azonban a jó vezetővé válás élethosszig tartó folyamat. Gyakran hallhatjuk azt az állítást is, hogy vezetőnek születni kell. Számos esetben ennek cáfolatával is találkozhatunk. Kutatásunk során ezzel a kérdéskörrel is foglalkoztunk, melynek

eredményeképp elmondhatjuk, hogy kutatásunkban is ellentmondások születtek ezzel kapcsolatban. Azt a következtetést vontuk le, hogy a jó vezetővé válás két dolog függvénye. Elsősorban kemény munka áll mögötte, azonban némi tehetségre is szükség van ahhoz, hogy az embereket irányítani tudjuk.

A kutatás során felvetettük a kérdést, hogy jó vezető csak az lehet, aki folyamatos 100%-os teljesítményre törekszik. Az interjúalanyok elmondása alapján arra a következtetésre jutottunk, hogy a magas teljesítmény nem tartható fenn sokáig, az emberek nem gépek így senkitől sem várható el a folyamatos maximumra való törekvés. Motiválni kell az embereket, hogy jobbak legyenek, de nem szabad 100%-ot elvárni, mert az olyan magas fokú stresszhez vezet, hogy nem előbbre viszi a projektet, hanem hátráltatja azt. A vezető feladata viszont az, hogy példát mutasson beosztottai előtt, így mindig a legjobbra kell törekednie.

A szakirodalom számos modellt vázol arról, hogy milyen is a hatékony vezetési stílus. Ezek a modellek pontosan definiálva vannak és megfelelően körülhatárolják az adott stílus jellemzőit. Kutatásunk során azonban, azt a következtetést vonhattuk le, hogy a valós életben nehéz behatárolni azt, hogy pontosan milyen stílust is követ az adott vezető. Munkánk terjedelme sajnos nem engedte meg, hogy minden egyes vezetési stílust külön kielemezzünk az interjúalanyokkal. Így Kurt Lewin kísérleteit vettük alapul az interjúk során, amelyben arról szerettünk volna bizonyosságot nyerni, hogy valóban az autokratikus vezetési stílus sarkalja-e a legnagyobb teljesítményt a vállalati életben, ugyanis Lewin kutatása ehhez az eredményhez vezetett. Az interjúalanyok válaszaiban, ha rejtve is, de mindenkinél megtalálhattuk az autokrata vezetési stílust és annak jellemzőit. A vállalati életben nem működik sem a demokrácia, sem a megengedő stílus. Az emberek csak azt gondolják, hogy ez létezik. Valakinek irányítani kell, felelősséget vállalni és a döntéseket meghozni. Ezek vállalói a vezetők. Egy ideális világban a megoldás abban rejlene, ha Lewin által felállított három vezetési stílust, az autokrata-, demokrata- és megengedő-stílust összemixelnénk. De határozottan kijelenthetjük egybecsengően a szakirodalmi állításokkal, hogy a legeredményesebb vezetési stílus az autokrata vezetési stílus.

Ahhoz, hogy egy vezető hatékonyan tudjon dolgozni és eredményeket tudjon produkálni, szükség van motivációra. A vezető munkáját beosztottai eredménye is tükrözi, így nagyon fontos az, hogy a vezető tudja, mi motiválja embereit, mivel tudja őket jó teljesítményre sarkalni. Kutatásunkban nagy hangsúlyt fektettünk azoknak a tényezőknek a kimutatására, amik motiválják magukat a vezetőket és ezzel egyúttal azoknak a motivátor tényezőknek a megtalálására, amik cselekvésre buzdítják az alkalmazottakat.

Bármilyen motivátor tényező feltérképezése előtt, kutatásunkból és annak eredményéből kifolyólag elengedhetetlen, hogy minden vezető felismerje azt, hogy minden ember más, így mindenkit más és más tényező megléte motivál. Tudatában kell lennie annak, hogy a jó munka alapja a motiváltság. Nem a vállalati teljesítményértékelési rendszertől kell a vezetőnek várnia a megoldást, hanem minden beosztottra egyénileg, a felmerülő igények szerint kell felismernie a motivációs tényezőket. A vezetőket egybehangzóan első helyen a sikerérzet motiválja. Ami kutatásunk során meglepőnek bizonyult, hogy az általunk megkérdezett vezetők fele az anyagi elismerést

is kiemelte, olyan tényezőként, ami őt motiválja. Herzberg kéttényezős modelljét figyelembe véve, a pénz csak higiénias tényező, ami mérsékeli, esetleg megszünteti a dolgozó elégedetlenségét, azonban ez még kevés ahhoz, hogy motiválja is őt. A sikerérzet megléte motivációs tényezőként hat, Herzberg tanulmánya szerint is.

A vezetők beosztottaikat legtöbbször elismeréssel és bizalom meglétével motiválják, amik elmondásuk szerint olcsók, mégis nagy eredményt lehet elérni velük. Fontosnak tartották az anyagi javakat is és az előléptetés lehetőségét is. Kiemelték viszont, hogy minden egyes beosztottnak más a motivációs igénye, így ők személyre szabottan igyekeznek egyénhez és nem csoporthoz alakítani a motivációt. Az egyik vezető megosztotta saját képletét a motivációról, amit minden vezető figyelmébe ajánljuk, mivel úgy gondoljuk, ez egy nagyon jó megalapozása lehet a motiváció hosszú távú fenntartásának. Elsősorban, elengedhetetlen a motiváció megléte, ami mellett kell egy fajta képesség az adott embernél és nem utolsó sorban bizonyos munkafeltételek megléte is fontosnak bizonyulnak. Mivel ez a képlet egy szorzat, így ha bármelyik tényező nulla, akkor az eredmény is nulla lesz.

Kutatásunk keretein belül célul tűztük ki, hogy megvizsgáljuk és következtetést vonjunk le abból, hogy a kulturális különbségek figyelembe vétele fontosnak számít, ha a vezetők más kulturális háttérrel rendelkező egyénnel tárgyalnak, vagy beosztottuk más kultúrából származik.

Dinamikusan fejlődő világunkba a cégek egyik helyről vándorolnak a másikra. Emellett az emberek is gyakran változtatják lakhelyüket. Mobilizáció körülövez minket. A vállalatoknál nagyon sok kultúra megjelenik már a beosztottak között is. Az interjúalanyok úgy gondolják, hogy nagyon fontos a másik kultúrájának tiszteletben tartása. Elmondhatjuk, hogy ha valaki jó vezető akar lenni, akkor az első lépésének az kell, hogy legyen, hogy megismerje a vállalat kultúráját és az emberek kultúráját egyaránt. Ezek megléte nélkül képtelenség jól teljesíteni és együttműködni bárkivel is. Minden egyes kultúrában más a munkamorál, a hozzáállás, és a szokások. Ezek ismerete nélkül nem alakítható ki kölcsönös bizalom, s így a vezetők nem tudják kellően motiválni a kollégákat. A kulturális különbségek okán akaratlanul is rejtett sérelmek halmozódhatnak fel, amik akadályozhatják a hatékony csoportmunkát vagy épp két vállalat között az együttműködést.

Következtetések

Kutatásunk eredménye releváns képet nyújt arról, hogy milyen személyiségjegyekkel, tulajdonságokkal kell rendelkezni az ún. hatékony vezetőnek. A cikk elején kitűzött célok eredményeként elmondhatjuk, hogy a szakirodalom által kiemelt vezetői tulajdonságokat és személyiségjegyek listáját kibővítettük a saját kutatásunkból összegyűjtött adatokkal, így egy átfogóbb és jobban meghatározott képet adtunk a szükséges vezetői tulajdonságokról, amelyet egy hatékony vezetőnek birtokolnia kell. A kutatás során bebizonyosodott az az állítás, mely szerint az autokratikus vezetési stílus a leghatékonyabb. Sikeresen feltártuk a motivációs tényezőket, amelyek motiválják a vezetőket, és amelyekkel ők motiválják beosztottaikat.

A kutatás során igaznak bizonyult az állítás, hogy a kulturális különbségek figyelembe vételével a vállalatok versenyelőnyt tudnak kovácsolni.

Kutatásunk eredményének tudatában szeretnénk javasolni, hogy a megkérdezett vállalatok nagyobb figyelmet fordítsanak a motivációs tényezők feltárásának technikájának elsajátítására, melyre különböző tréningek oktatása során kerülhetne sor. Emellett szintén több tréning megszervezését javasolnánk a különböző kultúrák megismerésére, kulturális különbségek megértésére, mivel úgy gondoljuk a megkeresett vállalatok nagyobb többségénél erre nincs lehetőség. Noha magasabb kulturális ismeretekkel a vállalatok még nagyobb versenyelőnyt tudnának elérni.

Végül, de nem utolsó sorban fontosnak tartjottuk kiemelni azt is, hogy egy másik kutatás keretein belül megvalósítható lehetne az is, hogy nem csak vezetőket kérdezzünk meg arról, hogy ők mit gondolnak, milyen a hatékony vezetési stílus és ők mitől hatékony vezetők. A vezetők közvetlen beosztottait is interjú alá lehetne vonni, azzal a céllal, hogy alátámasszák vagy cáfolják azt, hogy a megkérdezett vezetőt, ők milyennek látják. Ezzel megbizonyosodhatnánk arról, hogy az elmondottak a beosztottak szemszögéből is valóban hatékonyak bizonyulnak.

Befejezés

Napjainkban egyre meghatározóbb tendenciává vált, hogy a vállalatok irányítására olyan vezetőket választanak ki, akik nem csak hatalmukat kihasználva, önkényesen irányítanak, hanem olyan személyeket, akik képesek a kitűzött célok megvalósítására, úgy hogy közben a munkatársak céljait, motivációit figyelembe vevő vezetői magatartást alkalmaznak. Ezek a vezetők az ún. leaderek, akiket jogosan nevezhetünk hatékony vezetőknek.

Kutatásunk során célul tűztük ki, hogy az elméleti modelleket megvizsgáljuk, az alapján, hogy mennyire lehet gyakorlatban alkalmazni őket. Arra a következtetésre jutottunk, hogy a szakirodalomban pontosan körülhatárolt modelleket nem lehet a vállalati életben hasonló pontossággal meghatározni.

Célkitűzéseink között megjelent az, hogy egy pontos listát készítsünk arról, hogy milyen tulajdonságokkal és személyiségjegyekkel kell egy hatékony vezetőnek rendelkeznie, amely sikerült is.

Kijelenthetjük, hogy kutatásunk megalapozta azt a szakirodalmi állítást, mely szerint az autokratikus vezetési stílus a leghatékonyabb, ugyanis az embereknek szükségük van arra, hogy valaki irányítsa őket, felelősséget vállaljon és döntést hozzon.

Kutatásunkat segítő hat vezető elmondása alapján nagyon átfogó listát tudtunk készíteni a vezetőket és beosztottaikat leginkább motiváló tényezőkről. Minden embert más motivál, így arra a következtetésre jutottunk, hogy mindenkire egyenként kell kiszabni a saját maga motivációs rendszerét, ugyanis eltérő gondolkodással rendelkezünk, mások a prioritásaink, ebből következik, hogy más és más hat az emberekre motivációként. A leghatékonyabb és legolcsóbb motivációs eszköznek az elismerés és a dicséret mondható, azonban az anyagi javakról sem szabad elfeledkezni.

Munkánk nagyon fontos részét képezte a kulturális különbségek figyelembe vétele. Mára elterjedté vált a multinacionális vállalatok körében, hogy munkavállalók más-más kulturális háttérrel rendelkeznek. A globalizációval megkezdődött az emberek vándorlása is. Elkerülhetetlenné vált, hogy a vállalatok egyre nagyobb hangsúlyt fektessenek a munkavállalók képzésére a kulturális különbségek kezelése területén. Ugyanis minden kultúrában mások a szokások, értékek, más a munkamorál is, ez által akaratlanul is, de nagyon könnyen megsérthetjük a másik felet. Hatékony együttműködés, jó teljesítmény és bizalom csak akkor érhető el, ha a felsorolt tényezőket figyelembe vesszük.

A fentiek tudatában kijelenthetjük, hogy bebizonyítottuk azt, hogy a kulturális háttér ismerete elengedhetetlen ahhoz, hogy egy vállalat hatékony legyen, és ezzel egyúttal versenyelőnyt tudjon szerezni magának.

Kijelenthetjük, hogy kutatásunk elején kitűzött céljainkat elértük. Úgy gondoljuk, hogy munkánkkal aktuális képet tudtunk nyújtani a vezetés helyzetéről, a hatékony vezetőkről, a motivációról és a kulturális különbségekről.

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SOLVING FOR THE EQUILIBRIUM IN TQM ASPECTS AND CONSTRUCTING OF ITS COMPUTATION INSTRUMENT

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Abstract

Current debate in Total Quality Management (TQM) revolves around the possible contradictions arising within the orientation of its different aspects. Critics of TQM point out that there is an unhealthy relationship within these aspects which they categorize according to their orientation as 'hard' and 'soft' aspects. This paper discusses the scenario's in which such contradictions may arise, and try to solve them by modeling TQM issues in to a finite, non-corporative game. As a result, this research arrives at the positioning of the equilibrium which arises with each scenario. Further, we propose a method to compute the nature of this equilibrium using a concept we call as 'margin of mechanistic motive'.

Key words: TQM, 'mechanistic' and 'organic', margin of mechanistic motive

JEL classification: M11 , L15.O15

Introduction

TQM is an organizational philosophy which defined a new era of organizational excellence. However, emerging trends in TQM research indicates that there could be a mismatch or 'uneasy relationship' within the TQM aspects. TQM requires certain systematic, methodical aspects of basically controlling nature, to be in harmony with certain behavioral, motivational aspects of basically engaging nature. These controlling and engaging aspects taken in isolation do not qualify as TQM. As such, and organization excelling in TQM must embrace both these controlling or 'mechanistic' aspects along with the engaging or 'organic' aspects together. Evidence suggests that these features fit well in some organizations while failing in others. TQM failure till recently, have been presumed as due to issues in implementation.

However, recent research suggests this could be due to contradictions within TQM expectations and have established theories as to why these features may clash

especially in certain organization cultures. However existing research fall short in proposing a solid theory to rationalize why TQM should fail in some organizations.

This paper consists of a mathematical interpretation of the issue, taking TQM as a finite non-cooperative game between n-players each having to choose from two pure strategies. As such, what follows is the Nash theory (Nash, 1950) on existence of at least one equilibrium point maximizing each player's utility.

However, the main result of our analysis is the possibility of non-existence of such equilibrium point, which fits in a real world TQM scenario. In other words, we provide justification as to why the equilibrium point may be always in a bias towards one aspect of TQM which makes organizations to fail in equally prioritizing both these aspects.

Further, this introduces the concept of 'Mechanistic Motive' to describe this phenomenon and propose a 'Margin of Mechanistic Motive' as an indicator to the 'Mechanistic Motive'. These two indicators together, represent the transformational compatibility of an organization toward TQM adoption. Further, we test the instrument to measure 3M in the real world and provide a guideline for interpretation of results.

Issues in TQM

TQM is "a philosophy for managing an organization in a way which enables it to meet stakeholder needs and expectations efficiently and effectively, without compromising ethical values" (Chartered Institute of Quality, 2015). Its advocates see it as beneficial, providing competitive advantage while empowering the workforce.

It is based on the belief that increase responsibility on worker will increase their job satisfaction, and pride and produce better work. TQM is "broad enough to be the framework or foundation of an organization's culture" (De Alwis, 2011). Dean & Bowen (1994) have categorized TQM fundamentals under customer focus, team work and continual improvement.

TQM requires sweeping reforms in core features such as leadership style, culture, strategy, structure of the organization. Furthermore, "the transformation from the traditional Western paradigm to the TQM paradigm is a radical change" (De Alwis, 2011).

TQM practices can be broadly classified as either 'mechanistic' or 'organic' where former is the systematic measurement and work controls to reduce variability; latter is the customer orientation, employee participation, training, team work and cultural change (Dean & Bowen, 1994). TQM practice requires both 'mechanistic' features and 'organic' features incorporated into the system (Yokosawa & Steenhuis, 2012). TQM expects both these aspects to be present and reinforce each other at the same time. However the critics point out this process as a completion of capitalist expectation to create more control over the whole system (Wilkinson, et al., 1997). Thus, TQM process is seen as a completion of capitalistic labor control to produce better results. As such, in latter perspective TQM is another form of bureaucratic management which focuses on 'mechanistic' aspects (Alder, 1999).

Critics also point out the possibility of increasing management control and surveillance in reducing variance and introducing quality measurement systems. Devolution of responsibility increase tasks which are closely monitored and controlled by the management which does not lead to autonomy. It is argued that labor intensification, increase control and peer surveillance is more appropriate than flexibility, team work and quality in TQM which further supports the 'mechanistic' nature of TQM (Wilkinson, et al., 1997).

TQM often fails because of inconsistency of management approaches in trying to superimpose on the traditional economic model in which the priorities are to maximize profit, cost effective, self-centered and contractual relationships. TQM fundamentally tries to satisfy multiple interests of all stakeholders with the foremost interest of satisfying the customer. But, cost and management control are the hidden objective of many TQM programs today, and is probably a reason for their failure. Relations of power, privilege, identity and inequality reinforce the economic model of organizations (Knights & McCabe, 2002). New school of TQM has identified many contradictions within TQM philosophy. Issues which have come to surface are related to incompatibility of 'mechanistic' and 'organic' aspects of TQM in traditional organizations (Wilkinson, et al., 1997).

Scenarios in TQM orientation

For the moment let us assume the critic's argument on TQM to be true. It is clear in all the arguments in favor of critic's point of view that the 'organic' aspects of TQM bear less significance than the 'mechanistic' aspects. The 'organic' aspect is seen rather as a part of 'mechanistic' aspect. We have established two scenarios which can explain the arguments put forward by critics.

Scenario 1: In view of the traditional economic model the ultimate goal for any organization is profit. As such, the 'mechanistic' features could be more relevant than 'organic' features in a capitalist origination. Thus, the focus of the organization is on 'mechanistic' features making 'organic' features inferior.

Therefore, 'mechanistic' features are important to organizations than 'organic' features to achieve their objective.

Scenario 2: Another explanation that can be derived from the critic's arguments is the fact that 'organic' features further strengthen the 'mechanistic' features. In other words, 'organic' features were the means to achieve goals of 'mechanistic' features.

Therefore, 'mechanistic' goals are achieved through 'organic' means in an organization.

Modeling the scenarios

To view both scenarios in a mathematical point of view, a game is defined as follows.

Let's assume the game G played in a TQM organization with n players have basically two pure strategies that is to choose between 'mechanistic' (M) and 'organic'

(O) aspects. Here, actual M and O represent the set of 'mechanistic' M and 'organic' features. Each player tries to maximize their utility U, by choosing between M and O. let's also assume all n players in this game G need not to cooperate with each other to maximize their utility, nor a choice of any single player does not affect the utility of any other.

Let's try to model scenario 1 in to the game G. In scenario 1 the 'mechanistic' aspects are important to an organization than 'organic' aspects. This can affect G exactly in two ways.

It could reduce the options of any player within the pure strategy O. that is, as the organization does not consider O as important in terms of achieving its objectives, by the design of G, there will be lesser options within O, and there will be higher options within M. As such, the set M is larger in number than set O.

When taken as a whole, there will be higher utility for M than O reflecting the high importance M has as against O. Also all elements m, o within set M and O respectively will be such that their utilities $U_m > U_o$.

Similarly, whereas the scenario 2 is concerned it could result in the following case

There are no options for O, in terms of utility. Here, O is rather a process in realizing M, therefore the utility lies with M, not with O. the utility of M will remain static even if the player decides to change his means to something other than O. thus O does not bears utility at all, which nullifies O completely in terms of a utility. In this case a player has only the utility of M, thus the choices will fall in favor of M.

Equilibrium in each scenario

Now we'll take each case and analyze it in the utility perspective.

Scenario 1 : Case 1

As the numbers of choices are less in the set O, if the utilities are same a player choosing between M and O randomly will have higher probability in choosing from M. Thus, even if the decisions are not taken rationally there will be more tendencies towards M by each player.

Scenario 1: Case 2

Obviously, there will be more utility in a player choosing from M. There is no strategy other than choosing from M if a player wants to maximize its utility. A player choosing from M will not impact on any other player as all will benefit only from the pure strategy M. As such, there is no equilibrium point for any player in set O. It follows that the equilibrium G will be in the set M; where all the players will be continuously have to choose from M. As there is no rationale for any player to change the strategy, choices from set O will not be made throughout the game.

As the real world decisions are not purely based on rational choice, let us assume an x portion of all the decisions taken are faulty with respect to utility. Yet,

giving consideration to the probabilities established in case 1 it can be safely assumed that, out of x more will be chosen from set M for every game G.

Thus for the overall scenario 1, there is an equilibrium in set M such that each player can maximize their utility by choices in M.

Scenario 2

Obviously, as the only utility present, a player has no option other than M to choose from. Of course, in terms of selection, there will be choices in set O. But these choices are rather choices of means to arrive at M, therefore utility of choosing from O will be zero. Therefore the equilibrium point in the game is clearly in the set M in this scenario.

In both scenarios, a player will not benefit from choosing a strategy other than M. therefore there is no point for players to choose from O.

It should also be noted that reversing each scenario of the critics arguments, also will not be in favor of TQM as it will bring the equilibrium to set O. Then all the choices made will be in O making the essential features of M missed out. Even if the critics arguments are to be kept aside, and only acknowledging the mere fact that there is 'mechanistic' and 'organic' aspect in TQM is sufficient to raise doubts as to the presence of an equilibrium point. The reason is that the ideal theoretical equilibrium should fall in-between M and O to make balance of choices. As these aspects represent mutually exclusive choices, the solutions between M and O are only hypothetical. As such we argue there is no solution for this game in the finite space if the solution also requires a balance between 'mechanistic' and 'organic' features.

However, it is the intention of this paper to demonstrate that by making changes to the behavior of the utility function this can be solved. Let's assume that the utility function will change its nature with each iteration of the game. The change we propose is such that, for every game, if the equilibrium of the game is towards M, then in the i+1th iteration the equilibrium should be towards O. In other words after each game, all the players will have to shift their strategy from M to O and vice versa. Alternatively the pure strategies M and O will maximize the utility of each player. As such, the limit of the equilibrium will be neither in M nor O, but will be held in-between.

However, to bring this case in to the real world it is required for an organization to assess the existing level of deviation as described above. Therefore, we introduce an instrument to measure the deviation in TQM orientation towards 'mechanistic' or 'organic' features as explained below.

Mechanistic Motive

These two scenarios describe the motive of an organization in executing TQM. We introduce the concept Mechanistic Motive (2M) to demonstrate the combined phenomena observed in the above two scenarios. We define MM as "the tendency of an organization to bias the equilibrium of its TQM program toward the 'mechanistic' features". Therefore MM will represent the orientation of two factors namely

importance and behavior which is deduced from the two scenario's. Here the importance factor is the tendency of a TQM organization to hold the 'mechanistic' features more important than 'organic' features to achieve their objective whereas the behavior factor is the tendency of a TQM organization to expect 'mechanistic' goals to be achieved through 'organic' means in an organization. Level of MM in an organization is a lead indicator for TQM orientation of an organization in the long run.

Margin of Mechanistic Motive

In order to quantify MM as an indicator for TQM orientation we introduce the concept Margin of Mechanist Motive (3M). We define 3M as "the overall inclination of importance andbehavior factors from the ideal equilibrium towards a 'mechanistic' orientation". We also propose below an instrument to measure 3M for any organization.

Table 1: Measuring instrument of 3M

Aspect	Importance (1to 5 scale)	Margin of Importance	Behavior (-1 to +1) scale	margin of behavior
systematic measurement		Im =MI-OI		Ib = Mb-Ob
work controls				
'mechanistic' average	MI		Mb	
customer orientation				
employee participation				
training				
team work				
cultural change				
'organic' average	OI		Ob	

The instrument will measure importance factor in a 1-5 scale.The organizations are supposed to rate how important each aspect is to their organization; the least important parameter will be rated 1 and the highest important parameter will be rated 5. The average value of the response to 'mechanistic' aspects (denoted as MI) and the average value of the response to 'organic' aspects (denoted as OI) will be calculated. The margin of importance (Im) is the differencebetween averages obtained for 'mechanistic' and 'organic' aspects.

$$Im =(MI-OI)/5$$

As such in an ideal equilibrium situation Imwill take value 0 and the range of the function will be [-1.+1]

For the behavior factor, organizations need to select the aspects which have similar nature to their goals and means which will collect responses in a -1, 0, +1 scale. In doing so, the organizations are asked to rate +1 for that aspect having resemblance to their goals, and -1 for those having resemblance to their means. Zero marks will be given for the aspects which resembles neither goals nor means. The margin of behavior (Ib) is the difference of the averages obtained for 'mechanistic' and 'organic' aspects

$$Ib=(Mb-Ob)/2$$

As such in an ideal equilibrium situation Ib will take value 0. The range of the function will be [-1.+1].

Then we calculate the 3M by the following calculation.

3M=Im x Ibwhich will be ideally take the value 0. The range of 3M is [-1.+1].

Interpretation of values of 3M

Negative value

A negative value could be resulted only if either Im or Ib is negative, which means there is an imbalance of orientation of aspects as given below.

'mechanistic' aspects are more important, but behavior wise 'organic' aspects are dominant or,

'organic' aspects are more important, but behavior wise 'mechanistic' aspects are dominant.

Positive value

Similarly positive value could be resulted only if both Im and Ib have the same orientation. That is either both are inclined towards 'mechanistic' aspects or both are inclined towards 'organic' aspects.

However, TQM expects both the aspects to be present, reinforcing each other (Yokosawa & Steenhuis, 2012). Therefore we arrive at the suggestion that, a negative value for 3M will be more favorable for TQM implementation than a positive value. However, as both Im and Ibare at equilibrium at zero, a value closer to 0 will be more favorable for TQM.

To support the above theory we have tested this instrument in a TQM organization and a non TQM organization which resulted in a negative value and positive value respectively as expected.

Conclusion

As pointed out earlier there can be no solution in the finite space if the solution is expected to hang between 'mechanistic' and 'organic' aspects. However if we provide an allowance for the utility aspect to change its nature with each alternate iteration we can arrive at solutions for each game. The alteration should be such, if the equilibrium lies towards 'mechanistic' orientation, the utility of the immediate preceding game will change towards 'organic' features which in turn will result in change of equilibrium of the game towards 'organic' aspect.

As such, in each iteration of the game if I_m and I_b is measured it will alternatively take positive and negative values. Also as explained above it is more favorable for I_m and I_b to have alternative signs for value; that is if I_m takes plus value, I_b will have to take negative value and vice versa to facilitate reinforcement of both aspects.

Though a practical application of such theory is yet to be found in organizational context, as part of this research series, we intend to model the above theory in to an organizational reward function to represent the utility function above and observe the behavior in a real TQM context.

Also it is essential to validate the 3M instrument statistically before it can be brought in to any appropriate use. It is also a part of future research that we intend to conduct. Also 3M instrument can be used exclusively to test the critic's argument about the existence of 'mechanistic' and 'organic' features in TQM. If it could be proven, 3M is taking positive values in TQM organization with statistical significance the critic's argument will be debatable.

Also the 3M instrument need to be converted to a proper data collection technique such as a standard questionnaire before it could become usable in organization, which is again will be addressed in future research.

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WHY DON'T WE TRUST OTHERS?

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Abstract

The notion of trust is gaining increasing ground in international literature, not only in social sciences, but in relevant international business literature. Since being social is an inevitable part of being human, trust, as one of the basic interpersonal relations is of high importance. Without trust, not only teams, but institutions and societies would also fall apart. Formal relations cannot always substitute the subtle bond trust creates, what is more, formal solutions – necessitating a lot of paper work – are timely and costly.

Present paper endeavours to explore the meaning of trust through researching the way distrust is created among students at Óbuda University's Keleti Faculty of Business and Management.

The research findings are in line with the international literature, and indicate, that there are various forms of trust, and they very often coexist with each other.

Key words: *trust, mistrust, experience, personality, perception.*

JEL Classification: Z13

Bevezetés

A bizalom a társas relációk alapjaként számos diszciplína által kutatott jelenség. Talán éppen ebből fakadóan a mai napig nincs konszenzus definícióját, a kialakulását befolyásoló tényezőket, vagy az optimális/ideális szintjét illetően.

A bizalom jelensége azonban - a konfúz értelmezési kerettől függetlenül - a nemzetközi szakirodalom által mind társadalmi (Fukuyama, 1997; Hofstede, 2001, Minkov, Hofstede, 2014), mind intézmények közötti (Sako, 1992; Sundramurthy, 2008), mind pedig interperszonális relációkban (Cheung et alii., 2016; Leith, Hill, Harrison,

2010) igen jelentős szerepet tölt be. Fukuyama (1997) egyenesen a gazdasági fejlődés előfeltételeként tekint a társadalom szereplőinek kölcsönös bizalmára. A szervezetek közötti bizalom napjaink hálózatosan szerveződő világában egyre hangsúlyosabb alternatívája a tranzakciós logikára épülő üzleti kapcsolatoknak, hiszen egyes iparágak már olyannyira szegmentáltak, hogy a partnerekről való adatgyűjtés, az üzleti viszonyok formalizálása irracionálisan magas költségeket eredményezne, amely ráadásul továbbra sem oldaná fel a megbízó – ügynök helyzetben rejlő problémákat.

A bizalom, mint társas reláció azonban – bár számos üzleti és társadalmi implikációja van – elsősorban individuális karakterisztika. A bizalom, mint kapcsolatrendszer pozitív hatással van az egyénre (Seligman, Csíkszentmihályi, 2014). Az ember társas lény (Aronson, 1980), és a társasság nem csupán hangulati, érzelmi, de pszichés és szomatikus szinten is befolyásolja a működését (Berkman et al., 2000). A másokkal való kapcsolatokra törekvés ugyanis alapvető emberi szükséglet (Reis et al., 2000). A társasság nem csupán erőforrást – társadalmi tőkét és társas támogatást – jelent az egyénnek, de az önképének, önértékelésének is sarkalatos pontja. Mitöbb, a számos bizalmi kapcsolattal rendelkezők, kevésbé reagálnak a stresszt kiváltó tényezőkre, és jobb az egészségi állapotuk is (Barefoot et al., 1998).

Jelen tanulmány a Hegel-i alapokon az interperszonális bizalmat az antitézis oldaláról, a bizalmatlanság kialakulása felől igyekszik megközelíteni, abból az elméleti alapfeltevésekből kiindulva, hogy a bizalmatlanságot kialakító tényezők hiánya hozzájárul a bizalom létrejöttéhez és fennmaradásához.

A Bizalom Jelensége a Szakirodalomban

A bizalom fogalmának meghatározása máig sem egységes a szakirodalomban. Mindenki másért bíz meg a másokban és mást ért a bizalom, mint kifejezés alatt. A különböző tudományágak, illetve azok egyes képviselői a legkülönbözőbb módon definiálják ezen fogalmat, de általában elmondható, hogy a meghatározásokban kulcsfontosságú elemként szerepel a sebezhetőség, valamint az elvárás fogalma (Evans, Krueger, 2009). Ezek mellett a hit is egy fontos momentum a bizalom „folyamatában” (Budavári-Takács, 2011). Ezt bizonyítja az is, hogy a ’bizalom’ szó több nyelvben egyúttal ’hitel’ is jelent, így például a latin fides, vagy az angol faith kifejezések (Uo.).

A bizalom fogalma különféle léptékekben írható körül, egyesek például mint strukturális jelenséget közelítik meg (Shapiro, 1987), míg mások személyiségjegyként tekintenek rá (Rotter, 1980). Vagyis a bizalmat akár tekinthetjük a személyiség egyik dimenziójának is. A személyiség ugyanis nem más, mint jellemző tulajdonságaink viszonylag stabil szerveződése, amely meghatározza egyediségünket és megkülönböztet másoktól (Bakcsi, 2001).

A bizalom jelenségének két alapvetően különböző megközelítésmódja létezik:

Kockázaton alapuló (Barney, Hansen 1994)

Ez a megközelítés a hobbess-i természetjogi felfogásban gyökerezik, melynek értelmében a természeti állapotban az emberek számos, őket veszélyeztető kockázatnak

vannak kitéve, melyeknek forrásai az őket körülvevő természeti erők, valamint a többi ember. Hobbes érvelése szerint a természeti állapotban csak akkor célszerű másokkal együttműködni, ha biztosítva van, hogy nem fognak ártani az illetőnek (Nickel, Vaesen 2012). Ebben az „ember embernek farkasa” állapotban a bizalom egy kockázattal járó attitűd, ami alapvetően bizalmatlanságra ösztönzi az egyént.

Ebben az esetben a bizalom azt jelenti, hogy önkéntes módon kockázatot vállalunk abból eredően, hogy a másik fél által sebezhetővé válunk. Egyes kutatók szerint a bizalom definíciójának legfontosabb eleme éppen ez a „sebezhetőség tudatában való cselekvés” (Gyórfy, 2014) Ilyen értelemben a bizalom – Sztompka szavaival élve – egy olyan „fogadás, amit mások esetleges jövőbeli cselekedeteivel kapcsolatban teszünk meg.” (Sztompka, 1999)

A bizalom tehát cselekvési hajlandósággként is értelmezhető. Reláció, melyben a bizalmat nyújtó fél hajlandó arra, hogy a partnerével való együttműködése során oly módon viselkedjen, amely számára kockázatos.

Hiten alapuló (Kumar, 1996)

Ebben az esetben a bizalom nem mérlegelés és racionális döntés eredménye, hanem irracionális, érzelmi viszony. A másik fél bennünk létrejövő pozitív képének viselkedési kimenete. Az ilyen típusú bizalom esetében az egyén feltételezi, hogy mindkét fél érdekelt az együttműködés sikerében, emiatt a másik sem fog olyat tenni, ami veszélyeztetné az elérendő célt (Tóth I., 2015).

Ezen megközelítés mellett teszik le voksukat Rosenfeld és szerzőtársai (1978) is. Elméletük szerint egy társadalmi cserekapcsolatban egy cselekvésre adott válasz általában időben később történik, ez okozza a felmerülő információs problémákat, és nincs információ az azzal kapcsolatban, hogy fog a másik fél reagálni. Ez a kialakult helyzet kockázatként merül fel és bizalmon alapuló elköteleződést kíván a cselekvőktől.

Seligman (1997) szintúgy a bizalom hiten való alapulását fejezi ki, mikor a bizalmat a mások jó szándékába vetett hitként definiálja, mely hit egyúttal azt is elfogadja, hogy a másik ember szándékai az illető számára nem feltétlenül világosak.

Zucker (1986) a bizalom különböző formáit és azok megjelenésének feltételeit elemezte. Ő a bizalom megjelenésének három típusát írta le:

1. *Folyamat alapú:* Ahol a bizalom a múlthoz köthető, mint például a tekintély.
2. *Tulajdonság alapú:* Ahol a bizalom személyhez kötött és olyan tulajdonságok képezik alapját, úgy, mint közös családi háttér, vallás vagy épp az etnikum. Alapja a társadalmi hasonlóság, a partnerek ugyanahhoz a társadalmi csoporthoz tartoznak.
3. *Intézményi alapú:* Ahol a bizalom formális, szabályokhoz kötött társadalmi struktúrákhoz kötött. A bizalom megléte vagy hiánya ebben az esetben egyéni vagy cég specifikus sajátosságoktól függ.

Dessewffy (2014) szintén egy hármas felosztást használ, de egészen másfajta perspektívából, a bizalmat mint kapcsolatot, kultúrát illetve tudást vizsgálja meg szociológiai munkájában. Az első típus a társadalomban meglévő integratív erőként, a második a társadalmi értékrendből és annak változásaiból következő aspektusként, a harmadik pedig egy információs problémaként határozza meg a bizalmat.

Megint egy másik megközelítés szerint a bizalom két alaptípusa az interperszonális, illetve a szociális bizalom (Hadiwitanto, 2015). Az előbbi esetében az egyes személyek közötti közvetlen kapcsolatról beszélhetünk (pl. barátság), míg az utóbbi egy elvontabb, nem személyek közötti kapcsolatot feltételez: az egyénnek pl. a szociális rendszerhez, vagy a fennálló hatalomhoz való kapcsolatában megnyilvánuló bizalmat jelenti. Sztompka (1999) úgy vélekedik, hogy végső soron a szociális típus esetében is konkrét személyekre irányul a bizalom, minthogy ők elvont rendszereket is emberek működtetnek.

A bizalom kialakulásában több tényező is fontos szerepet játszik. Mayer és Davis (1999) négy jelentőset emel ki: (1) a személyes fogékonyság, (2) a másik fél kontrollálhatósága, (3) a jó hírnév alapján történő kategorizálás, amikor egy harmadik személy véleményére alapozva ítélik bizalomra méltónak vagy sem a személyt, és (4) a más meglévő sztereotípiák hatása. Mindezek javítják a személy pozitív megítélését, optimista érzelmeket váltanak ki, hozzájárulva ezzel a bizalom kialakulásához és fenntartásához.

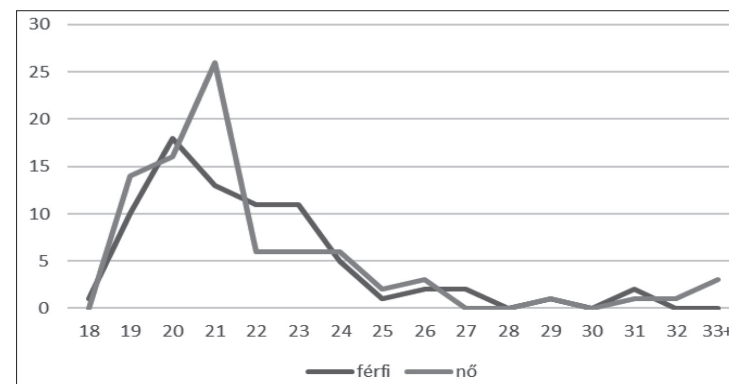
A másik személy észlelt tulajdonságai és a kialakított egyéni benyomások kiemelten fontos szerepet játszanak, és ezért a partnerek erőfeszítéseket tesznek, hogy pozitív képet alakítsanak ki önmagukról. Kísérleti eredmények azt mutatják, hogy a partnerek közötti együttműködés akkor a leggyakoribb, ha fenyegetésre egyik félnek sincs lehetősége. Tehát ha az együttműködő partnerek megbíznak egymásban, sokkal inkább együttműködnek, és kevésbé gyanakodnak partnerükre (Kovács, 2003). Természetesen a bizalom két emberen múlik, és amikor az egyik felet valamilyen csalódás éri, akkor fennáll a veszélye, hogy a sértett fél bezárkózik, általánosítani kezd és soha többet senkiben nem tud feltétel nélkül megbízni.

Kérdőíves Kutatás a Bizalmatlansággal Kapcsolatban

A bizalom jelenségét 2016 őszén az Óbudai Egyetem Keleti Károly Gazdasági Karára járó nappali tagozatos első, másod és harmadéves gazdálkodás és menedzsment szakos hallgatók segítségével vizsgáltuk. A kérdőív papír alapú volt, a csupán 5 kérdést tartalmazott. Jelen tanulmány a bizalmatlan fogalommal kapcsolatos szabad asszociációk rendszerét mutatja be. Mivel minden válaszadó szabadon sorolhatott fel több asszociációt is, ezért a válaszadók számánál több válasz kerül a későbbiekben bemutatásra.

Az intézményben 200 db kérdőív került kiosztásra. A kérdőíveket önkéntes alapon töltötték ki a hallgatók. Így 163 értékelhető kérdőív érkezett vissza. A kitöltési arány tehát 81,5%-os volt. A 163 fő a teljes sokaságot tekintve 45,3%-os kitöltést jelent, ami mennyiségét tekintve megfelel a módszertan előkövetelményeinek. A válaszadók között közel azonos arányban képviseltették magukat a férfiak (77) és a nők (86). Ez az arány különösen jónak tekinthető, ha figyelembe vesszük, hogy Magyarországon a férfiak válaszadási hajlandósága lényegesen alacsonyabb, mint a nőké (Szűcs, 2014).

1. ábra: A válaszadók nemek és életkor szerinti megoszlása

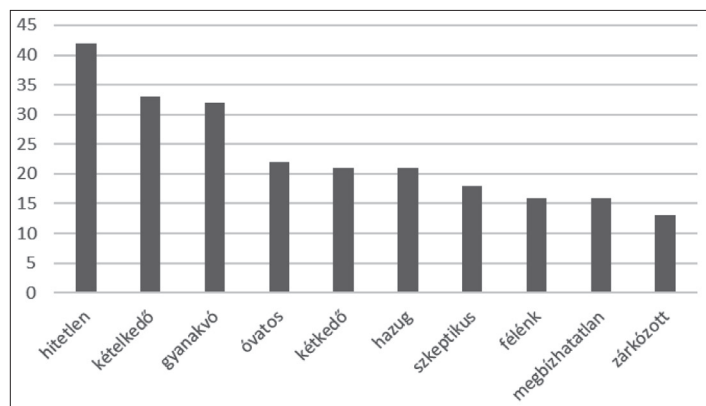


Forrás: saját szerkesztés

A válaszadók átlag életkora 21,96 (szórás: 3,54) volt. A legfiatalabb válaszadó 18, a legidősebb 40 éves volt. Az átlagot és a szórást erősen befolyásolja, hogy a válaszadók között 40, 37, 36, 32 és 31 éves is volt. A válaszadók életkor szerinti eloszlása - mint ahogyan azt az 1. ábra is mutatja - nem tekinthető normálisnak, (Ferdesség: 2,633; Csúcsság: 9,021), azonban követi az alapszakon hallgatóktól elvárt életkori megoszlást. A medián és a módusz egyaránt 21 volt. A válaszadók 36,4%-a volt 20 éves, vagy annál fiatalabb, és 90,5%-uk 25 éves, vagy annál fiatalabb. A férfiak átlagéletkora (21,79 év, szórás: 2,617) némiképp alacsonyabb volt mint a női válaszadóké (22,11 év, szórás 3,913), ami az idősebb női válaszadók mintában való jelenlétével magyarázható. A két nem átlagéletkora között azonban nem tárt fel szignifikáns különbséget a független mintás t-próba.

A bizalmatlansággal kapcsolatos asszociációk igen széles jelentési mezőt definiáltak. A tíz leggyakrabban megjelölt asszociációt a 2. ábra tartalmazza.

2. ábra: A leggyakoribb asszociációk az azt választók száma szerinti gyakoriság szerint



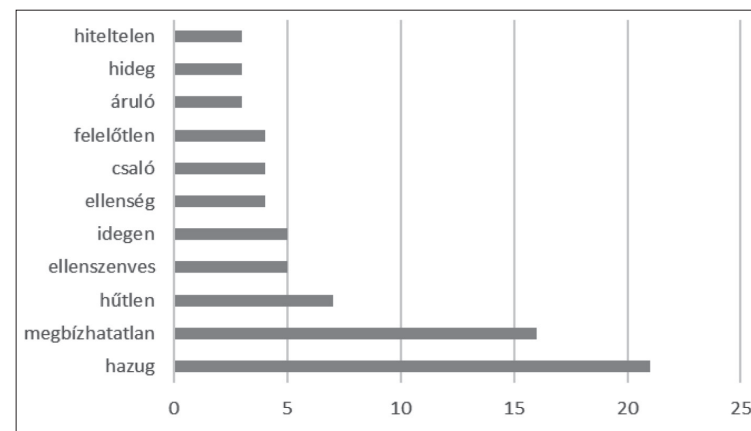
Forrás: saját szerkesztés

Az asszociációk – jelentésüket és érzelmi töltetüket tekintve - három nagy csoportba voltak sorolhatók:

1. a másik fél negatív tulajdonságait kiemelő asszociációk,
2. a bizalmatlanságra, mint racionális „pozitív” tulajdonságra tekintő asszociációk
3. a bizalmatlanságot szinonimák segítségével körülíró, meghatározó jellemzők.

Az első csoportba tartoztak az egyértelműen negatív jelentést tartalmazó jelzők. Ezek listáját és előfordulási gyakoriságát a 3. ábra tartalmazza. A bizalmatlanságról a válaszadók igen nagy hányada (13%-a) a hazugságra asszociál. ezt követi a megbízhatatlanság 10%-os gyakorisággal. A 3. ábrán jelzett asszociációk mindegyike a bizalmatlanságért a relációban részt vevő másik fél negatív tulajdonságait teszi felelőssé; tehát oksági viszonyt feltételez a másik fél viselkedése és a bizalom, illetve annak hiánya között. A válaszadók 62% válaszolta a 3. ábrán felsorolt negatív tulajdonságok legalább egyikét a kutatási kérdés kapcsán. Ennek megfelelően megfogalmazhatjuk, hogy a bizalmatlanság – legalább részben – múltbeli rossz tapasztalatok következménye.

3. ábra: A másik fél negatív tulajdonságait kiemelő asszociációk az azokat választók száma szerint



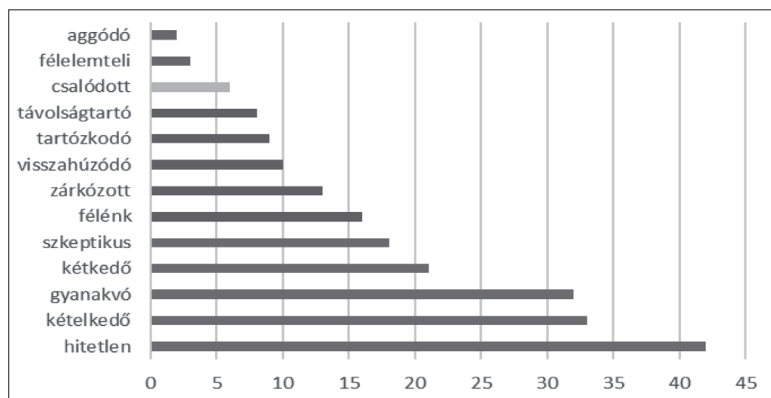
Forrás: saját szerkesztés

A válaszadók egy része (21%) a bizalmatlanságot „pozitív” tulajdonságként definiálta. Asszociációikban az „óvatos” (22 fő), a „megfontolt” (8 fő), a „realista” (7 fő), valamint az „okos” (2 fő) jelzők szerepeltek. Ezek a válaszok azt tükrözik, hogy a hallgatók a bizalmat a kockázat irányából közelítik meg, és számukra a bizalom azt jelenti, hogy önkéntes módon kockázatot vállalnak, és ez által sebezhetővé válnak. A bizalmatlanság ebben a vonatkoztatási rendszerben tehát a kockázat tranzakcionális logika mentén történő elutasítását jelenti.

Az asszociációk harmadik, és egyben legnagyobb csoportja a bizalmatlanságot szinonimák segítségével meghatározni kívánók körét takarja. A „Miért is vagyok bizalmatlan?”, illetve a „Mitől leszek bizalmatlan?” kérdésekre keresik a választ. A 4. ábrán bemutatott fogalmak legalább egyikét a válaszadók 97%-a választotta. Ez egyrészt felhívja a figyelmet a lineáris gondolkodás prevalenciájára a vizsgált sokaság körében – ugyanis a szinonimák célja ugyanannak a jelenségnek (relációnak) a magyarázata az értelmezési mező megváltoztatása de az algoritmus megtartása segítségével.

A jellemzők ezen csoportja további alcsoportokra bontható. A 4. ábrán piros színnel jelölt tulajdonságok a bizalomra mint aszimmetrikus, kiszolgáltatott viszonyra tekintenek, így a bizalmatlanságot az információ hiányának oldaláról közelítik meg. A második csoportban bemutatott tulajdonságokkal ellentétben azonban, ezeknek a jellemzőkben közös, hogy mindannyian másodlagos negatív konnotációt hordoznak.

4. ábra: A személyes jellemzőket segítségül hívó asszociációk gyakorisága a válaszadók száma szerint



Forrás: saját szerkesztés

A 4. ábrán kék színnel jelölt válaszok a bizalmatlanságot személyiségvonásokhoz kötő, azt bizonyos típusú (személyiségű) emberek sajátjának tekintő jellemzőket tartalmaznak. Az asszociációk háttérében az a hiedelme húzódik, hogy a nyitott, kommunikatív emberek megbíznak másokban, míg a zárkózott, introvertált személyek bizalmatlanok, illetve nehezebben bíznak meg másokban.

A sárgával jelölt „csalódott”-ságot jelző válaszok valószínűsíthetően az első csoportban bemutatott negatív tapasztalatok visszahatását jelzik, míg a szürke jellemzők olyan személyes karakterisztikákat jelölnek, amely a bizalmatlanságot nem múltbeli tapasztalatok alapján, hanem a jövőtől (ismeretlentől?) való félelem oldaláról közelítik meg.

5. ábra: A Bizalmatlanság témakörében megfogalmazott asszociációk



Forrás: saját szerkesztés

Összefoglalás

A bizalom, és annak ellentettje a bizalmatlanság is összetett társas jelenség. Mindenki másképp viszonyul hozzá és mást ért alatta. Jelen tanulmány célja az volt, hogy megvizsgálja a fiatalok bizalmatlansággal kapcsolatos értelmezési keretét. A vizsgálatra az Óbudai Egyetem 163 hallgatójának megkérdezésével került sor.

A kutatás adatai azt bizonyították, hogy a bizalmatlanság nem kapcsolható össze egyértelműen egyetlen másik fogalommal sem, bár a hallgatók közel negyede tekinti a „hitetlen” kifejezést a „bizalmatlan”-ság szinonimájának. A kutatás során sikerült az asszociációk mögöttes okainak vizsgálatával 4 különböző jelentési mezőt elkülöníteni.

A jelentési mezők egy része a válaszadók analógiás gondolkodásának eredményeként a bizalmatlanságot szinonimák segítségével körülíró, meghatározó jellemzőket tartalmazta, melyek egy része a másikkal való viszonnal kapcsolatos, a másik része pedig az önmagunkra irányuló figyelemmel kapcsolatos személyiségvonásokkal kapcsolódott össze. Emellett jól azonosítható volt a másik fél negatív tulajdonságait kiemelő asszociációk és a bizalmatlanságra, mint racionális „pozitív” tulajdonságra tekintő asszociációk köre.

A jelen tanulmányban bemutatott adatok egy nagyobb kutatás részét képezik, mely reményeink szerint lehetőséget biztosít majd a jelenség mélyebb megértésére, valamint a bizalom és a bizalmatlanság kialakulását befolyásoló tényezők feltárására. A kutatás az Új Nemzeti Kiválóság Program keretében az emberi erőforrások Minisztériumának támogatásával került megvalósításra.



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SELECTION OF EU FINACED PROJECTS AND THE TERRITORIAL COHESION

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Abstract

Territorial cohesion is a precondition for harmonious territorial development. In order to achieve , the state holds an irreplaceable role together with its institutions and mechanisms. the quality of management institutions plays a key role in achieving sustainable spatial development and social welfare. Important is also the manner of government management, as well as internal decision-making processes. This paper deals with the complementarity of decision-making processes in the selection of projects funded by EU funds and their impact in the development of the territory. The sectoral approach to implementing EU cohesion policy as well as rural development policy, different criteria, rules and processes in resource allocation decision-making are a significant obstacle in achieving efficiency and cohesion at local level.

Key words: *Regional development, sustainable development, regional government, territorial cohesion, project evaluation, selecting criteria*

JEL Classification: R58, H7

Introduction

The development of rural development policy and EU regional policy is very similar. However it does not mean that there is coordination and cooperation between these two (Farose T., Rodrigues-Pose, Stoper, 2009). On the contrary, these policies are implemented in regions more or less separately and the policy actors are only interested in their own issues in their territory. This situation persists despite the constant calls to the coherence of sectoral and territorial policies. The creation of “rural cohesion policy” is very urgent, particularly in the case of rural development (Diakosavvas, 2006). Through territorial cohesion, it is possible to achieve harmonious, sustainable and polycentric development and exploit the specific potential of each territory in a sustainable manner. The reason of such an approach is to achieve synergy that multiply the potential of regional resources (EC 2014). Effective co-ordination

of territorial management requires a sufficiently built-in institutional system that minimize transaction costs. Transaction costs are a significant economic factor due to the existence of institutions. According to some authors (Williamson, 1996, Coase, 1998) they represent up to 50-60% of the net national product. These are costs related to information retrieval, negotiation costs and the costs of enforcing contracts. Institutions are hierarchically organized. Hierarchically higher institutions determine and influence hierarchically lower institutions (Baláz, 2007). For example, state laws affect the opportunities and actions of regional and local actors. An important factor is the sustainability of institutions, which influences the ability of actors to establish stable relationships with other actors in the territory. If institutions are known to actor and actor does not have to "search for them", he will minimize his transaction costs and maximize the effectiveness of his interactions with other actors (Hogson, 2004). Inflexible system and poor quality institutions in a spatial unit reduces its functionality and worsens the economy (Baláz, 2007). On the other hand, effectively functioning institutions can provide stability in collective choices which would be chaotic without institutions (North, 1990). In the context of smaller territorial units, the most important are institutions including their structure (local or regional self-government), laws and regulations, conventions, values, convictions, property rights but informal relationships and links between actors in the territory (Clingermayer and Feiock, 2001) play crucial role. These institutions, according to Vázqes-Barquer (2002), can reduce transaction costs, increase confidence among economic actors, increase entrepreneurial capacity in the region, multiply learning processes and strengthen networks and cooperation among actors. A sufficient amount of effective institutions that are connected to institutional networks determines the potential of the territory for development (Farose, Rodríguez-Pose, Stoper, 2009). To prosper it is necessary to make a deliberate effort to the choice of responsible institutions, and also to take a responsible approach to the policy that society prefers. Institutions and politics chosen by the state are the basis of its wealth or poverty (Nižňanský, Hamalová, 2013). Olson (2002), in his breakthrough publication „The Logic of Collective Action“ claims that: *“The sums lost as a result of the bad choice of institutions of poor states and that these states proceeded and act reckless, that they have not established democratic systems and for these reasons achieve only fragments of their economic potential, that these sums represent trillions of dollars.”* Well-functioning institutions are therefore an important tool for achieving cohesion in the development of the territory. The need for territorial cohesion results from globalization that lead to geographical concentration and reallocation of activities. This mean an increase in territorial disparities (Medeiros, 2012). It is evident that territorial cohesion is an important objective of European policies in order to have a more balanced territorial development. Territorial cohesion is, according to the EC (2007) ... *“a necessary condition for achieving sustainable economic growth and the implementation of social and economic cohesion - the European Social Model.”* Integrated territorial approach in policy decisions has become a European priority. A variety of European policies contain a territorial dimension.

Although territorial development in the European Union is heavily dependent on market forces, in the age of globalization, territorial cohesion is the primary objective of the EU's political agenda. Therefore it is necessary to correct unfair, inefficient and unsustainable territorial disparities in the EU (EC 2010).

Material and Methods

Achieving territorial cohesion requires coordination of relevant policies up to local/ regional level. Achieving territorial cohesion through the synergy of implemented projects is a goal of the EU cohesion policy as well as individual national governments policies. It requires a system of institutions that communicate effectively with each other with the lowest transaction costs. In countries that have undergone economic and political transformation, the institutional system is inadequately steady and has many bottlenecks that reduce its effectiveness. High transaction costs, loss of resources and inefficient use are taking place.

The aim of this article is to identify bottlenecks and failures in evaluation and selection processes for Applications for non-repayable financial contributions (NFC) in the Regional Operational Program (ROP), the Rural Development Program (RDP) and the Operational Program Environment OPE). These programs have been selected for analysis because of their specific spatial projection and potential to complement each other in a territory. An intense combination of projects from these programs can achieve their synergy and the growth of local territorial cohesion.

The methodological approach is based on a comparison of evaluation and selection criteria, on analysis of evaluation processes in individual operational programs and their potential for synergy and territorial cohesion. The input information for the analysis is the methodological manuals for evaluators of applications as well as methodological guides for applicants of NFC. Other sources of information were the EU regulations as well as the Slovak government regulations concerning the implementation of projects from the EU Cohesion and Structural Funds, the guidelines of the relevant managing authorities, as well as the territorial strategic materials of the Self-government regions (SGR).

Results and Debate

In the 2014-2020 programming period, the European Union has been providing Slovakia with approximately 15 billion of EUR which are currently a crucial source of territorial development. EU funds currently account up to 75 % of public investment. Up to 80 % of these funds are administered by national or regional governments. 68 % of these resources are for regional policy and 28 % for agricultural and rural development. These are extraordinary resources that will not be repeated on such a scale in the future. Effective use of these resources depends not only on their destination but also on their distribution in the territory.

The aim of EU is to achieve territorial cohesion. The instrument for achieving this is an integrated approach. This requires territorial coordination of sectoral policies at every level, local starting and European ending. It also requires vertical coordination between different levels of territorial management, cooperation between individual territorial units, which will allow a functional approach to the development of the territory.

Processes of formal verification of applications for non-repayable financial contribution

Project evaluation is the process of assessing a project application based on established procedures and criteria including point allocation and scaling, as well as the conditions for disapproval of any application if it does not meet the specified criteria (EU, 2007). To achieve cross-sectoral coordination and territorial cohesion formally, the Central Coordination Body (CCB) created the document *"Structural Funds and Cohesion Fund Management System for 2007-2013"*. By this document the CCB has committed individual managing authorities (MA) within the framework of the National Strategic Reference Framework (NSRF) for the same administrative procedures in NSRF implementation. The eligibility criteria assess the suitability of the applicant based on the type of applicant, territorial concentration, combination of project activities, size and duration of the project. These criteria are disqualifying criteria and we can assert that they are used correctly, since each applicant can be informed in detail and can easily understand them before applying. As far as the criteria for completeness are concerned, their failure to implement the NSRF 2007-2013 led to the exclusion of projects but over time the majority of MA are writing to applicants to complete the application and fulfil the criteria of completeness. For the ROP the completeness criteria were checked with the applicant on-site when applying for a NFC. The process of evaluating the eligibility of the applicant as well as the process of evaluating the formal criteria of the projects submitted is therefore centrally coordinated. Thus, the prerequisites for cross-sectoral coordination in the selection of project applications are met.

Expert evaluation processes of non-repayable financial contribution applications

Projects that have met formal and eligibility criteria are going through an expert evaluation process to perform a professional, objective, independent and transparent assessment of the compliance of NFC applications with evaluation criteria approved by monitoring committees for individual operational programs. The expert evaluation of NFC applications should be according to the document *"Structural Funds and Cohesion Fund Management System for 2007-2013"* performed through internal or external evaluators who have good professional experience, who are blameless and, in

the context of expert evaluation, they sign a fair statement of impartiality, confidentiality and bias.

In the process of expert evaluation of projects, the first obstacles to achieving synergies in the sectoral different projects begin to emerge. The synergy of the sector's various projects is the first step towards territorial cohesion. The root of the problems lies in the fact that each operational program has its own evaluation criteria, which logically stem from their focus, but some common territorial unification criteria lack to help manage the process of spatial deployment of projects. Of our evaluated operational programs, only the ROP has selection criteria of compliance with the regional territorial development strategy. In some territorial strategic documents of the SGR, integrated operations with an impact on the territory of the whole region are defined. Here are designed functional regions and projects that should be preferably implemented in these territories. However, the SGR authorities have no competence with regard to the concrete selection of projects and the assessment of the potential of projects in achieving territorial synergy and cohesion.

Regional operational program 2007-2013

After fulfilling the conditions of formal verification, the NFC application proceeds to an expert evaluation, where it is assessed by the internal or external evaluators. The Ministry of Transport, Construction and Regional Development of the Slovak Republic has never used external evaluators from the professional public, unlike the OP Environment and the RDP. The entire ROP was used only by internal evaluators, i.e. employees of MA. The internal evaluation process was carried out in accordance with pre-established instructions for evaluators, but these instruction are not available to public.

The purpose of the expert evaluation is to identify the contribution rate of the submitted projects to the fulfilment of the ROP objectives and the relevant ROP measures. In the process the following aspects of the project are considered for each project:

- Suitability and usefulness of the project - significance 26-42%;
- Way of realization of the project - significance 20-35%;
- Budget and Cost Effectiveness - significance 12-24%;
- Administrative, professional and technical capacity of the applicant - significance 2-12%;
- Sustainability of the project - materiality 12-24%.

These aspects are assessed through evaluation criteria for individual measures. The point score is the result of the weight of the criterion that does not change and the number of points for that criterion ranging from 0 to 4. It depends on the subjective view of the evaluator how many points it assigns to the project. However, the applicant is not in a position to evaluate whether the project fulfils the criterion at 0,1,2,3 resp. 4 points. E.g. Criterion *"Conformity of project with ROP objectives, priority axis and measures"*. The applicant can earn 0-24 points for his fulfilment. The subject of the evaluation of the criterion is defined as follows: *"The criterion assesses whether*

the objectives of the project are in line with the objectives of the ROP, the priority axis and the ROP measure 4.1". This statement is so general that the applicant is not able to estimate with what number of points he can count on his project. Such criteria, unfortunately form a majority. The MA also uses the so-called Disqualification criteria¹.

The application must reach certain minimum points within each evaluation criteria group. The sum of these points is the admissible minimum that will ensure that the project participates in the selection process.

The application does not proceed to the selection process in the following cases:

- it did not reach the minimum score of the total score required in the expert evaluation and / or
- it has not achieved the minimum required score in at least one set of evaluation criteria and / or
- it failed at least in one disqualifying criterion approved by the ROP Monitoring Committee.

In these cases, MA for the ROP issues and sends the applicant a decision not to approve the NFC application.

Operational Program Environment 2007-2013

According to the Guide for Applicants from the OPE, expert evaluation is carried out by expert evaluators, selected on the basis of criteria in the public selection of experts. The expert evaluation consists of evaluating the criteria by assigning the number of points (0-4) and multiplying the weight to the relevant criterion as for the ROP. In the case of assessing the consistency of a project with strategic environmental documents, the evaluator may use the disqualification criterion, so if the project is not in conformity with the documents mentioned, the evaluator assigns him 0, thus excluding him from the next evaluation process. However, it is not clear on what basis the evaluator will evaluate this criterion.

The expert evaluation is divided into five groups and is focused on evaluation:

- Project objectives,
- The potential of the project to fill indicators,
- Sustainability of the project,
- Professional project processing,
- Technical design of the project,
- The financial aspects of the project,
- Meeting specific criteria.

¹ Disqualification criteria - if the applicant fails to do so, his project will not go into the selection process. In the ROP, for example: Project compliance with ROP strategy, compliance with concentration in Cohesion and innovation growth poles, compliance with tourism strategy, applicant's capacity, etc.

The NFC application meets the professional evaluation conditions and proceeds to the selection process if:

- gain at least 50% of points in each of the groups of criteria;
- gain at least 70% of the total score for all criteria groups;
- get the full number of points (4 points) within the disqualification criterion.

After analysing the criteria, we can say that some of them are insufficiently explained and the applicant may not know how much weight will be assigned to his application for each criterion.

Program of rural development 2007-2013

The application, described in 2 programs above, proceeds to the evaluation and selection process only after the formal verification. The applicant is invited to complete the project in case of missing items. From our own experience, we can conclude that the time limits that MA commits to the formal verification call for compliance are not being respected. The evaluation criteria are part of the applicant's guide. Some of the criteria are evaluated by Agricultural payment agency employees. These are objective criteria where it is precisely determined under what conditions the applicant can obtain a certain number of points. E.g. In measure 3.1 Diversification towards non-agricultural activities, if the project is implemented in the municipality where applicant carries out agricultural activity - 10 points, if in the district - 8 points, if in the region - only 6 points. Depending on the measure some evaluation criteria are evaluated by external evaluators, selected by public selection from the professional public. The external evaluators evaluate in some cases also on the basis of non-public manuals for the evaluator. In the process of implementation, there is also a shift towards better transparency by MA position. For example, in measure 3.4.1 The basic services for the rural population in 2009, an applicant did not know how many points were assigned to the criterion, but in 2012 MA published a more detailed specification of the score scale, thus giving the applicants at least some possibility of better project setup. However, there is still a high level of subjective evaluation (60%) from external evaluators who are selected by MA.

Selection processes of NFC applications

Project selection is the process when the final package of project applications is selected based on the rating criteria set for project evaluation. Account shall be taken of the overall package of available resources for each call or evaluation period. The purpose of the NFC applications selection process is to select projects by assessing the compliance of submitted NFC applications with selection criteria approved by the relevant Monitoring Committee. The process of selecting applications is a critical area where it is definitely decided not only whether the project is of good quality and whether it will contribute to the development of the area but also whether synergy will

be achieved with other already implemented projects or with the projects envisaged, and implicitly whether territorial cohesion will be achieved. Here the criteria in the evaluated operational programs are ambiguous, fuzzy, sometimes even obscuring.

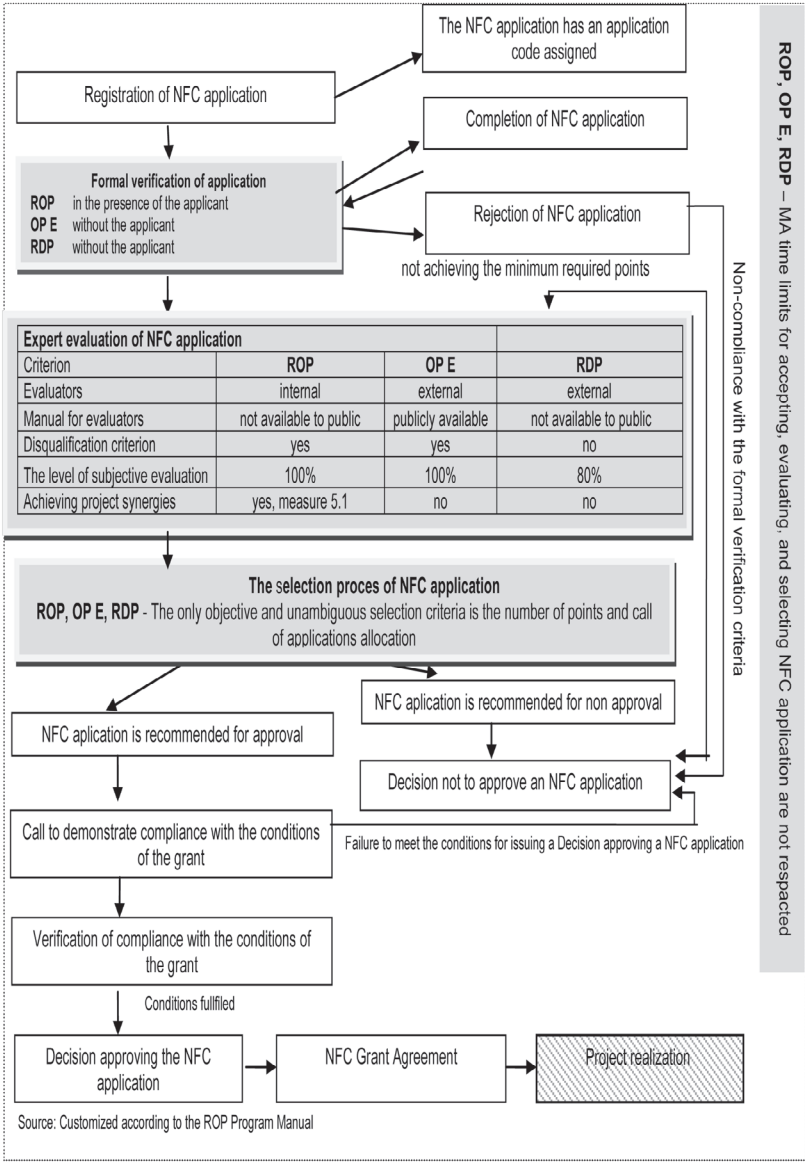
Regional operational program 2007-2013

Following are the selection criteria and they are the same for all ROP measures:

- Results of expert evaluation** - the criterion is met if the application has been submitted to the selection process.
- Significant contribution of the project to the fulfilment of the ROP objectives** - the application is considered from compliance with project aspects in the group "Suitability and effectiveness of the project" and "Method of realization of the project".
- Geographical location of the project** - the criterion examines the geographical location of the project in terms of the appropriate territorial distribution of support within the ROP. Here, it may seem that the criterion may affect the appropriate spatial distribution of projects within the territory, but we do not know how the Selection Committee can prioritize one project over another.
- Applying a comprehensive approach to addressing marginalized Roma communities** - the application may be advantaged if it is consistent with a comprehensive approach to MRK solutions in a given community.
- Amount of allocation to the relevant call for NFC applications**

The points for the selection criteria are exclusively in the competence of the Selection Committee, which consists of representatives of MA, CCB and in some cases even from SGR members. The MA's responses to the rejection of the NFC application are limited to a reference to non-compliance with the selection criteria or to non-compliance with the minimum number of points in expert evaluation process. The applicant does not know at all where he made a mistake and how he can improve in the future in re-submitting the project.

Chart 1: The evaluation and selection process of NFC application in selected operational programs



The selection process consists of drawing up a list of projects that have undergone formal verification and achieved a minimum score in the expert evaluation process. Projects are ranked according to the score in the list and are approved according to the volume of funds in the call. There are no further selection criteria in the process.

Program of rural development 2007-2013

The selection process and project selection criteria are the same as for the OP Environment. The process of evaluating and selecting projects in selected OPs is summarized in Chart 1.

Conclusion and debate

After analysing the evaluation and selection criteria in the ROP, we can state that in the context of project sustainability, the evaluator has an obligation to examine the link of the project with other relevant projects in the region, whether within NSRF operational programs or other projects from other sources. However, if the evaluator fulfils this criterion, the project may grant a max. 12 points out of a total of 200 points. If the project does not have links to other projects of similar scope in the territory, it cannot be excluded for that reason. We believe that the applicant does not know from such a vague statement whether some of the investments in his municipality can be considered as an example of territorial synergy and how many points he could get in this criterion. However, under measure 5.1 which involves the reconstruction and modernization of routes II. and III. class, there is a disqualification criterion that gives the applicant a direct link to the territorial concentration of investments that will ensure the interconnection of municipalities outside growth poles with growth poles. As part of this measure, we can assert that the criterion has been chosen correctly and creates a prerequisite for spatial synergy in the territory.

In OP E, none of the evaluation and selection criteria examines the consistency of projects with projects submitted under RDP, ROP or projects submitted from other sources. In our opinion, individual demand-oriented projects are at least unnecessary for Priority Axis 1 in OP E concerning the construction and reconstruction of water supply and sewerage systems. It would be enough to take an already existing map of completed sewerage and water supply and a Plan for the development of public water supply and sewerage systems and select individual applicants gradually, so that they will not have to invest funds from their own budgets.

RDP evaluation and selection criteria do not examine the synergy of projects with projects submitted under OP E or ROP. In isolated cases, criteria explore the synergy in RDP itself, for example, whether the farmer is investing in agro-tourism or renewable energy in the municipality or region where his farm located is. Or

whether the sources for renewable energy production are primarily bio-waste from the agricultural production of the farm or whether the farm is supplied by renewable energy it generates.

In conclusion, we can summarize that the managing authorities do not follow the spatial synergy of the projects, despite the fact that projects from different programs meet in the same municipalities. Except for Measure 5.1 of the ROP, the MA does not follow what projects have been approved in the region in the past and in what programs. MA do not know if it is necessary to reconstruct three cultural houses in villages next to each other or elementary schools in villages with fewer inhabitants with a question of sustainability and quality of teaching. In our opinion, it is more efficient to reconstruct one primary school and one cultural house together for several municipalities, to equip them well and to use them meaningfully throughout the year. This would avoid wasting public funds and increase the quality of services provided to the population.

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AN ASSESSMENT OF FINANCIAL KNOWLEDGE IN HIGHER EDUCATION

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Abstract

This paper analyses the educational self-assessment of native (Hungarian) and non-native (international) undergraduate business economics students, focusing primarily on the concept of financial literacy as students predict and evaluate their own performance in written examinations relative to their externally assessed achievement. In our estimations we also examine and compare the gender and linguistic gaps in both the self-estimation assessment results. Although there is no clear gender gap when dealing with overestimation, we found substantial differences when comparing language background of the students. Consequently, our results might allow policy makers to establish that it is important to improve financial literacy, as well as providing evidence about which groups of people are in need of support to reduce disparities, not only in higher education but in other social contexts as well.

Key words: *self-assessment, overestimation, higher education, financial literacy*

JEL Classification: B23, I22, I25

Introduction

From time to time the great economic crises shed light on the negative consequences of making decisions without adequate financial knowledge. Financial literacy is especially critical nowadays for promoting desired financial behaviours, such as making carefully deliberated decisions which result in prudent saving and budgeting, or regarding the use of bank loans (IBRD, 2009). The OECD (2005) defines financial literacy as the ability to use knowledge and skills to manage financial resources effectively for a lifetime. Thus, financial education is the process by which people improve their understanding of financial products and services etc., in order

to become more aware of risk and return, so they are empowered to make informed choices, to avoid undesirable consequences, or to recognize where to apply for help, and take other measures to improve their present and long-term financial well-being (PACFL, 2008). Greater financial literacy, together with financial education, can reduce the likelihood of customers at any income level purchasing products or services that they do not need or that are not in their personal interest. Consequently, financially competent consumers are more likely to save their money, compare financial products and services, and discuss daily financial routines with their families.

Individuals are considered financially literate if they are competent and can demonstrate that they have used the knowledge they have learned. However, financial literacy cannot be measured directly. As people become more literate they become increasingly more financially sophisticated, and this may also mean that an individual may be more competent (Moore, 2003). Messy & Atkinson (2012) highlighted that most people have fairly straightforward financial knowledge; they also indicated that in several countries certain respondents are often over-confident. In this case, they give incorrect answers rather than admitting that they cannot distinguish an appropriate response. Research in behavioural finance has also suggested that many households do not in fact save their earnings optimally, nor realize that their investment decisions may lead to unacceptable living standards (Yoong et al. 2009). Consequently, the financial crisis will reduce access to credit and increase its operating cost in financial markets. Moreover, inaccurate self-assessment of creditworthiness also has attendant negative consequences. Perry (2008) found that at least one third of clients in the U.S. overestimate their own credit rating and tend to be less financially informed. Zorn et al. (2008) also demonstrated that inaccurate self-assessment of financial risks can lead to a higher annual percentage rate on a mortgage.

Financial literacy can help to prepare consumers to survive these 'disasters', by promoting financial strategies that mitigate threats, such as accumulating savings, diversifying investments and purchasing insurance. Moreover, financial literacy also reinforces those activities - such as the timely payment of bills and sustaining liquidity - that can encourage clients to maintain their access to bank loans and other debts. Consequently, financial literacy is coming to be recognised as an essential solution for consumers in an increasingly complex financial environment.

Our motivation to write this paper comes from the fact that in higher education a large proportion of students seem to be prone to irrationally evaluate their own financial knowledge (see Macdonald. 2004). However, there is still no existing consensus on whether or not students' self-assessment ability is obviously learnable (e.g. Everett 1983; Zimmerman & Schunk 2001; Ross 2006 etc.) during higher education. White et al. (2003) pointed out that specific students are exposed to the phenomenon of inaccurate self-assessment. Therefore, our study focuses primarily on measuring business students' financial knowledge used to predict and evaluate their own performance. In this comparison our findings highlight that some student groups are relatively financially literate, and that all students can gain from the provision of high-quality financial education in schools. Thus, policy makers will be able to establish that supporting financial literacy, not only in higher education but in other economic contexts, is an important tool in reducing social disparities.

Brief literature review of self-assessment of students' financial literacy

The theoretical and empirical debates about the economic role of financial literacy have arisen as a result of the lack of systematic methods and the limitations regarding appropriate data. An adequate measure of the financial literacy of undergraduate students provides evidence to indicate whether the current financial education system is effective or not. Nevertheless, financial literacy has generally been measured by the use of performance or self-assessment tests. This first approach is primarily knowledge-based, reflecting the conceptual definitions of literacy. However, the measurement of financial literacy in PISA (OECD, 2014) has already been completed, and the results from the assessment of 65 OECD countries have revealed widespread disparities in educational outcomes within and across countries. Meanwhile, recently there has been fewer data collection efforts aimed at measuring the accuracy of financial literacy among young people. These type of self-reports assess perceived financial knowledge or respondents' confidence in their knowledge in terms of how much they think they know. Consumers also tend to overestimate their financial skills and knowledge, and, at the same time, respondents often feel they are more aware of financial issues than is actually the case (OECD, 2005). Nevertheless, emerging evidence has suggested that perceived knowledge may have a predictive ability beyond existing financial literacy (Messy & Atkinson, 2013). This phenomenon derives from the fact that individuals do not usually know the extent of their current financial knowledge and decides to work with more 'guessed' information (Mitchell, 2007).

Messy and Atkinson (2012) also indicated that there is a positive relationship between education and financial literacy. More highly educated individuals are more likely to exhibit positive behaviours and attitudes as well as show advanced levels of financial knowledge. The contribution of human capital became an especially popular theme in the literature after the rise of theories advocated by Schultz (1961) and Becker (1964). Later, Nakamura (1981:263) noted that the human factor is critical for improving our life, and defined human capital (HC) as "labour, managerial skills, and entrepreneurial and innovative abilities - and such physical attributes as health and strength." Although this idea made it possible to introduce HC into new economic theories, it must be noted that its economic role in the globalized world has still not received adequate attention in the financial literature.

However, there is also no agreement in the literature regarding the relationship between students' measured performance and the accuracy of their self-assessment. Kruger & Dunning (1999), Karnilowicz (2012) and Kun (2015) etc. concluded that higher achieving students are more accurate in their self-assessment than low achievers, but O'Neill et al. (2006) have rejected this phenomenon. Sistrom et al. (2003), and Reiter et al. (2004) also found that pre-assignment predictions are less confident than later self-evaluations. Unfortunately, the notion of accuracy in several studies is still confusingly determined by referring to measurement by self-assessment. In this paper, accuracy is defined as the results of the absolute difference between the

student-estimate and the ultimate tutor-estimate exam scores and is used to describe the student's self-estimation ability of overestimation.

Considering the theoretical background of our research, we assume that a certain stock of financial knowledge, which can be thought of as the sum of all education and training, results in the students' received performance, and directly serves to increase the level of financial literacy. From this perspective, the main purpose of this study is to explore whether high-achieving students are more accurate in self-assessing their financial knowledge. Our research represents an analysis of written examinations taken at the University of Debrecen, focusing primarily on business economics students' self-assessment as regards their financial knowledge.

In the following subsections, we first describe our hypotheses, and then present the data available and the methods applied in our research. Finally, we attempt to draw a brief conclusion from the results of our research, which will hopefully clarify some empirical and policy debates on the contributions higher education makes to financial literacy.

Hypotheses

According to Macdonald (2004) and Siström et al. (2003), there may be a gender gap in the direction of the student's self-estimation. In historical data, Voyer and Voyer (2014) showed that these gender differences favoured females in all fields of study and the advantage in school marks has remained stable across the examined period. Meanwhile, Mitchell & Lusardi (2011) found that women are significantly less likely to answer questions correctly, and to more accurately declare that they don't know the right answer. However, these disparities are not consistently reported, because there are several studies that could not identify any gender related effects of self-estimation, such as Kruger & Dunning (1999) and Hobohm et al. (2012).

In order to demonstrate whether the gender gap in terms of the students' accuracy exists or not, we are also assuming that (H1) female students tend to estimate their own performance less confidently compared to males.

Based on the findings of the literature reviewed above, and assuming that female students over assess their examination results than their male fellows:

H11: Female students tend to overestimate their own pre-examination performance more than male students.

H12: Female students tend to overestimate their own post-examination performance more than male students.

This paper also demonstrates the disparities in the student's self-assessments according to different language backgrounds. Several research projects in the field of education have offered a variety of explanations for differences in performance between native and non-native students. Basically, foreign students may differ from native-born students in their family and home circumstances (family income, wealth and education etc.) in ways that influence their financial performance (White & Glick, 2003). A second set of explanations is based on differences in school readiness and prior theoretical experiences. While some international students may learn a language other

than academic English as a first language, limited linguistic proficiency and skills are undoubtedly more common among them (Chin & Bleakley, 2004). Both our foreign (international) and Hungarian students were controlled by the same examination process, but due to the programmes offered by the Faculties, the financial courses are taught in English for the foreign, and in Hungarian for the native students. However, although international students officially should use their academic English, some of them come from China, Korea, Nigeria and Turkey etc. where English is not native to the education system.

In order to take account of the impact of language differences we focus separately on the accuracy of the native Hungarian and international students and assume (H2) that academic international students tend to estimate their own performance less confidently compared to the Hungarians. In this sense four sub-hypotheses are also formed, specifically:

H21: International students tend to overestimate their own pre-examination performance more than Hungarian students.

H22: International students tend to overestimate their own post-examination performance more than Hungarian students.

Material and Methods

Our estimations are based on a sample of 142 Hungarian and 78 international bachelor (BA) students (85 men and 135 women) from the Faculty of Economics and Business at the University of Debrecen, Hungary. At the time of the examination 50 students were studying on the International Business Economics, 30 on the Tourism and Business, 72 on the Trade and Marketing majors and 78 on the BAinMBA International majors. Their compulsory Introduction to Finance courses provided the basic concepts of financial management i.e. how people and firms think about the behaviour of financial markets, and also helped them understand financial statements and decisions. By the end of these courses students were able to use some basic financial tools for analysis, and to apply these tools in the valuation of financial assets. Moreover, lectures and seminars covered the following subjects: the relationship between firms and the financial market, the content of financial statements, the valuation of corporate taxes, cash flows, the time value of money, central banking and the conduct of monetary policy, financial institutions and markets etc. The examination was carried out on two specific dates, one for the Hungarian and one for the international students. Moreover, two different test versions (identified as A and B) were also chosen, each taken by 73 and 69 Hungarian and 39 and 39 International students, respectively. Consequently, eliminating infrequent effects deriving from the differences among the test versions and majors, these factors are considered dummy variables during our analyses. All test versions had the same structure, with 10 true or false (T/F), and 20 multiple-choice (MC) questions (one or more correct answers from four choices). Each correct response was worth one point. Before the students started their examination they were asked to predict their total T/F and MC scores. To motivate them to predict more accurately,

they were offered a higher percentage in a later test as a bonus if they could estimate well; specifically, a bonus for a perfect hit for both questions, and additional bonus if the approximation was within a ± 1 point range. After the tests had been completed, they were also requested to make their final estimation of the same test scores so as to correct their former prediction if they desired. Moreover, students were informed that only their second estimation was involved in the final valuation process to determine bonus points. In this way, the pre- and post-examination assessments made it possible to research how students are able to reconsider their financial knowledge after the test.

In order to exemplify the robustness check of our estimations we measured self-assessment regarding financial knowledge using various methodologies. In this paper, besides various descriptive statistics, (binary logistic) regression models and independent sample t-tests are frequently analysed to highlight the differences among our evaluations.

Results

Before testing our hypotheses mentioned above, in Table 1 we summarise and provide an overview of the minimum, maximum, average mean and standard deviation values of the pre- and post-examination self-estimations of students and the tutor-assigned test scores. Other factors, such as majors, test version, gender etc. have not been considered here.

Table 1 Descriptive statistics of pre- and post-estimated and tutor test scores

Estimations	Type	N	Minimum	Maximum	Mean	Std. Deviation
Pre	Total	220	11	30	21.22	3.86
Post		220	11	29	21.46	3.98
Tutor		220	5.5	29	20.91	4.1
Pre	T and F	220	3	10	6.86	1.27
Post		220	4	10	7.22	1.33
Tutor		220	2	10	6.60	1.63
Pre	MC	220	6	20	14.36	2.85
Post		220	6	19	14.24	3.06
Tutor		220	3.5	19	13.31	3.31

Note: T and F – True and False, MC – Multiple choice. Total points = T and F + MC.

Source: based on own calculations

Table 1 suggests that students tend to overestimate their test scores more in the pre- than in the post-examination evaluation. The average means of self-assessment scores of students were higher both before and after the examination than their tutor-assigned scores. The significance of these outcomes is considered through an examination of the hypotheses listed below. Table 2 contains the list of further independent variables so as to explain each element of the contents that were tested in our models.

Table 2 Explanation of variables

Variables	Explanation
FINALSC	Tutor-assigned final scores of the true or false and multiple choice questions
SEX	1 if the student is female, 0 if male
LANGUAGE	1 if the student takes their exam in English, 0 if he/she uses their native Hungarian language
MAJOR1	1 if the student is on the Trade and Marketing BA major, 0 if no
MAJOR2	1 if the student is on the International Economics and Business BA major, 0 if no
MAJOR3	1 if the student is on the Tourism BA major, 0 if no
MAJOR4	1 if the student is on the Business and Management BA major, 0 if no
OETTPRE	1 if the student overestimated his/her total test scores before the exam, 0 if not
OETTPOST	1 if the student overestimated his/her total test scores after the exam, 0 if not
DIFSUMPRE	The difference between the student's pre-examination and the tutor assigned estimation
DIFSUMPPOST	The difference between the student's post-examination and the tutor assigned estimation

In our regression models the tutor-assigned final scores FINAL and the dummies of SEX, LANGUAGE, MAJOR1, MAJOR2 and MAJOR3 and MAJOR4 are selected to maximize the 'goodness of fit' (R², as the percentage of the response variable variation) of the regression models. Thus, the pre- and post-accuracy of self-assessment (OETTPRE and OETTPOST) are estimated independently in two alternate models. The first (Model 1) contains all the available independent variables and the other (Model 2) is restricted to those that are significant at least at the 10% p-level. However, in order to identify the clear relationship between the students' achievement and the accuracy with which they overestimate their own performance, a binary logistic regression might be an appropriate tool for our analysis. Moreover, there are additional coefficients that are not included in our restricted models to demonstrate how students evaluate their financial knowledge. Hence, the validity of our conclusions is limited by the bias caused by the exclusion of certain of these variables.

In all observed models (see Table 3 and 4), the dependent variable indicates the likelihood of students' over-assessment. Those cases where the students evaluate their own performances accurately are estimated without an error and left out of the

sample. The proportion of variance explained by the predictors (measured by Cox and Shell's, Nagelkerke's pseudo R2 and R2 change) of the binary logistic regression models are relatively high – indeed high enough – to agree with our results.

In Models 1 and 2 we found a significant relationship between the accuracy of students' predictions and the tutor's assessments. Here, the dependent variable is the accuracy of the students' pre-test and post-test estimations regarding the direction of overestimation, while the variable of the tutor-assigned test score is an independent variable among other determinants. Essentially, the effect of tutor-assigned final scores on overestimation does not seem to be large, but in both models the students' final results correlated negatively with the accuracy of overestimation. As a result, for every one-unit increase in the tutor-assigned test scores (i.e., for every additional point, and holding all other independent variables constant), impact negatively on overestimation. Thus, additional sub-hypotheses are also tested, which focus directly on self-estimation by gender and language regarding the extent of estimation errors occurring not independently of their positive sign. In this case, we are also assuming that female and international students tend to overestimate their examination results less than male and Hungarian colleagues. First, we have paid particular attention to variations in gender. According to our results, in Model 1 and 2 of the pre-estimation for the total and the T and F questions, gender (SEX) has a positive and significant effect on accuracy. At the post-estimation we could not find any significant relationship between our SEX and dependent variables.

Table 3 Results of the binary logistic regression models for the pre-examination of self-assessment

Dependent variable	OETTPRE					
	Total		T and F		MC	
	Model 1	Model 2	Model 1	Model 2	Model 1	Model 2
CONSTANT	-11.77	4.52	-14.81	4.01	-15.83	2.28
	0	(23.09)***	0	(22.01)***	0	(11.05)***
FINALSC	-0.39	-0.24	-0.64	-0.61	-0.38	-0.21
	(39.79)***	(29.49)***	(30.68)***	(29.55)***	(28.91)***	(18.29)***
SEX	0.64	0.58	0.77	0.32	0.61	0.55
	(3.43)*	(3.56)*	(5.70)**	(5.89)**	(3.51)*	(3.89)*
LANGUAGE	20.71		19.35		21.59	
	0		0		0	
MAJOR1	18.17		18.37		19.31	
	0		0		0	
MAJOR2	19.54		19.28		20.26	
	0		0		0	

MAJOR3	18.81		19.34		19.91	
	0		0		0	
Cox and Shell R ²	0.28	0.17	0.21	0.17	0.21	0.11
Nagelkerke R ²	0.37	0.23	0.27	0.24	0.27	0.14
Omnibus χ^2 test	71.57***	41.37***	51.41***	43.48***	50.94***	25.21***
HL χ^2 test	6.41	12.13	6.49	7.57	7.59	12.13

Note: Heteroscedasticity robust Wald-statistics are in parentheses. Letters in the upper index refer to significance: ***: significance at 1 per cent, **: 5 per cent, *: 10 per cent. P-values without an index mean that the coefficient is not significant even at the 10 per cent level. HL: Hosmer and Lemeshow χ^2 test.
Source: based on own calculations

Hence, only H11 hypotheses can be accepted because female students seem to predict and overestimate their examination results more than their male colleagues. These results are in accordance with Mitchell and Lusardi (2011), who also found that women are significantly less likely to answer questions correctly, and more accurately declare that they don't know the right answer before the tests.

Table 4 Results of the binary logistic regression models for the post-examination self-assessment

Dependent variable	OETTPOST					
	Total		T and F		MC	
	Model 1	Model 2	Model 1	Model 2	Model 1	Model 2
CONSTANT	-12.51	4.61	-15.02	4.87	-16.44	2.91
	0	(26.01)***	0	(29.93)***	0	(17.02)***
FINALSC	-0.36	-0.21	-0.62	-0.59	-0.34	-0.18
	(37.03)***	(26.14)***	(29.67)***	(29.14)***	(24.72)***	(15.58)***
SEX	-0.53		-0.53		-0.51	
	-2.53		-2.53		-2.51	
LANGUAGE	21.62		21.62		22.39	
	0		0		0	
MAJOR1	19.57		19.57		20.58	
	0		0		0	
MAJOR2	20.71		20.71		21.33	
	0		0		0	
MAJOR3	19.72		19.72		20.75	
	0		0		0	

Cox and Shell R ²	0.24	0.13	0.18	0.16	0.16	0.08
Nagelkerke R ²	0.31	0.18	0.24	0.22	0.21	0.11
Omnibus χ^2 test	59.26***	32.57***	43.91***	39.61***	37.67***	19.14***
HL χ^2 test	1.86	5.53	16.72	8.28	7.59	20.36

Note: Heteroscedasticity robust Wald-statistics are in parentheses. Letters in the upper index refer to significance: ***: significance at 1 per cent, **: 5 per cent, *: 10 per cent. P-values without an index mean that the coefficient is not significant even at the 10 per cent level. HL: Hosmer and Lemeshow χ^2 test.
Source: based on own calculations

Although, the impacts of language-skill-related (LANGUAGE) variables are seem to be affected overestimation before and after the exams the results are not significant. Anyway, international students are less likely to evaluate their examination results correctly than their Hungarian colleagues. Essentially, more sophisticated methods are needed to analyse the ways in which students’ estimate their self-assessment of financial knowledge when dividing the sample by gender and language. Therefore, independent samples t-tests are used on pre- and post-examination assessments to ascertain whether students tend to estimate their own financial knowledge more highly than their tutor-assigned scores. Here, as the methodology is assumed, the differences between the student’s examination and tutor assigned estimation should be normalized.

In our descriptive estimations (see Table 5) female overestimated their total test results in pre- and post-examination in the case of multiple-choice and total test scores. The same results cannot be claimed if different languages are also taken into account because both of the native and international students are seemed to overestimate their results.

Table 5 Descriptive statistics (number of students) of self-estimation by gender and language

PRE-ESTIMATION									
Sample	Total			T and F			MC		
Accuracy	O	A	U	O	A	U	O	A	U
Female	72	5	58	31	19	85	85	8	42
Male	34	4	47	27	16	42	46	8	31
Hungarian	65	9	68	26	18	98	91	5	46
International	41	0	37	32	17	29	40	11	27

POST-ESTIMATION									
Sample	Total			T and F			MC		
Accuracy	O	A	U	O	A	U	O	A	U
Female	67	9	59	39	18	78	77	15	43
Male	49	3	33	25	20	37	47	8	30
Hungarian	71	6	65	30	28	81	77	11	54
International	45	6	27	34	10	34	47	12	19

Note: O-Overestimate, A-Accurate, U-Underestimate.
Source: based on own calculations

Although we assumed that females seem to predict and evaluate their examination results more accurately than their male colleagues, according to the t-tests, (see Table 6) the only significant differences between the two sexes occur in the T and F questions. Indeed, we should reject both hypotheses of (H11) and (H12).

Meanwhile, analysing the difference in the students’ self-estimation and the tutor assigned results by language we found the following results. In our hypotheses international students tend to overestimate their own pre- and post-examination performance more than Hungarian students do. Confirming these assumptions, our results show a significant difference between the two samples, both in pre- and post-examination multiple-choice and total test scores, where international students are proven to make a greater overestimation of their performance.

The mean difference was (0.28) at the pre-estimation (the average mean of the Hungarian students was (-0.09), and of the international students (0.18)). At the post-estimation it was (0.23) (the average mean of the Hungarian students was (-0.08) and in the case of international students (0.15)).

Consequently, international students overestimated their own pre- and post-examination performance more than their Hungarian fellows, so hypotheses H21 and H22 can be accepted. In this case, we can claim that substantial differences can be found in terms of over-estimation by language.

Table 6 Comparison of self-estimation by gender and language with t-tests

	Types	Sample	Levene's F	t	Mean Diff.	S.E.M.	95% Conf. int. of the Diff.	
DIFSUMPRE	Total	Sex	2.64	-0.21	-0.03	0.13	Lower	Upper
		Language	0.69	(2.00)**	0.28	0.14	0.00	0.56
	T and F	Sex	3.46	(-2.03)**	-0.27	0.13	-0.53	-0.01
		Language	0.31	(5.99)***	0.77	0.13	0.51	1.02
	MC	Sex	0.29	0.91	0.13	0.14	-0.15	0.4
		Language	1.87	-0.73	-0.1	0.14	-0.38	0.18
DIFSUMPOST	Total	Sex	1.26	-0.83	-0.11	0.14	-0.39	0.16
		Language	3.02	(1.73)*	0.24	0.14	-0.04	0.51
	T and F	Sex	4.11	(-2.81)**	0.03	0.14	-0.25	0.29
		Language	0.29	(3.43)***	0.46	0.13	0.2	0.73
	MC	Sex	0	0.18	0.03	0.14	-0.25	0.3
		Language	3.80	0.30	0.04	0.14	-0.24	0.32

Note: N=220 (85 males and 135 females; 142 Hungarian and 78 International students); * $p<0.1$; ** $p<0.05$; *** $p<0.01$.

Source: based on own calculations

Conclusion

Making adequate financial decisions is especially critical for today's globalized financial markets. These challenges primarily focus on ensuring better financial education to expand access to products and services for consumers. Not surprisingly, governments are currently interested in searching for effective methodologies to improve the level of financial literacy and initiating many processes to create or lead national strategies for financial education to provide learning opportunities among their future supporters (Messy & Atkinson, 2012).

In this study the first objective was to analyse how economics students can estimate their examination results regarding their financial knowledge. In our models we firstly found that the higher achieving students seemed to predict and evaluate their examination results more accurately and tend to overestimate their examination results less than their lower achieving fellows. This is in accordance with the conclusions of Kruger & Dunning (1999), Sundström (2005) and Karnilowicz (2012). Consequently, enhancing financial education for better financial literacy is an effective policy response to empower consumers in financial markets. In particular, low-performing students need to improve their ability to participate in a real economic

environment. They should also acquire the financial knowledge and skills that will allow them to understand a wide range of monetary services and products.

The results of our regression analysis show some gender differences between pre- examination results, where female seem to overestimate their performance. These results are similar to Mitchell & Lusardi's (2011) findings, which also reported that women are significantly less likely to answer questions correctly. Controversially, these findings are not supported by the independent sample t-test, and there are no significant differences between the overestimation results by gender. Although our findings need to be interpreted carefully, as the evidence is drawn from different methodologies, we cannot claim that female students have fewer opportunities than men, and perhaps less motivation to continue to learn and develop their financial skills in the future. From this perspective, educational policies should also aim to eliminate gender disparities to acquire financial literacy skills in order to make their first financial decisions as they leave school and start their adult life.

Finally, from another point of view, we also focused on the differences in self-assessment in financial literacy by language, which can vary across specific socio-economic groups. The results of this analysis provide evidence from which substantial disparities can be found in self-estimation. Obviously, the international students overestimated their own pre- and post-examination performance more than the native Hungarian students. Our results suggested that language skills by itself can explain one aspect of the disparities in financial performance across students. This means that it may be the best solution to focus on English language proficiency to solve persistent educational and socioeconomic disparities in higher education.

Generally, these results highlight that policy-makers should concentrate on reducing 'skill-gaps' by motivating clients to learn more and improve their financial knowledge. In order to mitigate the risks to financial stability arising from the low level of financial literacy in households, the Central Banks of the OECD countries should make an effort to emphasize the development of financial-related topics (i.e. booklets, special reviews, programs for young students and the elderly etc.) and on improving financial culture (Seidl et al, 2007).

A growing number of studies deal with the impact of assessment programs that offer financial education in schools. These make it possible to identify potentially effective strategies for providing financial education (OECD, 2014). Thus, the success of these programs depends on several factors, including developing high-quality resources and teaching practices (interactive materials with practical exercises, with content relevant to young people's lives etc.) focusing on the acquisition of financial knowledge (Bruhn et al. 2013). We also agree with Zia & Xu (2012), who revealed that improving the effectiveness of financial literacy programs will require better integration of new valuable insights from both behavioural economics and social research. In our

opinion, greater efforts are still needed to strengthen consumer protection and to develop and reinforce financial knowledge in each country.

One of the main limitations of our study is that other important factors that impact on financial literacy, such as the students' risk assessment, the characteristics of their schooling, the features of examination process etc., are not included in our models, due to the restricted access to data. Moreover, this pilot research was conducted within one university, in two faculties, and in one country, so these findings would have a limited generalisability. It also appears that universal conclusions related to enhancing financial literacy cannot be drawn in respect of the accuracy of self-assessment in only one HEI. Nevertheless, our further research can open the door to investigating financial literacy by additional socio-demographic groups. Moreover, we expect to implement further analysis in the coming years to explore and expand the extent to which other determinants may explain and make comparable the assessment of financial knowledge in different ethnic groups in higher education.

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A TOURISM AND SELECTED TOURIST FACILITIES IN THE CZECH REPUBLIC AND REPUBLIC OF BELARUS

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Abstract:

The aim of this paper is to compare a tourism and selected tourist facilities in the Czech Republic and republic of Belarus. Tourist facilities include for example: hotels and similar accommodation facilities, catering facilities, tour operator and travel agency, etc. Author's put research question: Despite the increasing number of the selected tourist facilities in the Republic of Belarus, is the below the level of the tourism facilities in the Czech Republic. Research question, based on the analysis, was confirmed. In the Czech Republic in the year 2014 reached for example number of collective accommodation establishments 9 013 with 519 909 bed places. In the Republic of Belarus the maximum number of the collective accommodation establishments reached in the year 2015 with 1014 and bed places 39 161. As the theoretical methods were used analysis, synthesis, abstraction, comparison and induction.

Key words: *Czech republic, republic of Belarus, tourist facilities, tourism*

Abstrakt:

Cílem tohoto příspěvku je porovnat cestovní ruch a vybraná turistická zařízení v České a Běloruské republice. Mezi turistická zařízení patří např.: hotely a podobná ubytovací zařízení, stravovací zařízení, cestovní kanceláře a cestovní agentury. Autory byla položena výzkumná otázka, že navzdory rostoucímu počtu vybraných turistických zařízení v Běloruské republice, jejich počet nedosahuje počtu turistických zařízení v České republice. Výzkumná otázka, na základě analýzy, byla potvrzena. V České republice v roce 2014 dosáhl například počet hromadných ubytovacích zařízení 9 013 s 519 909 lůžky. V Běloruské republice maximálního počtu hromadných ubytovacích zařízení bylo dosaženo v roce 2015 s 1014 a počtem lůžek 39 161. V příspěvku byly použity teoretické metody analýzy, syntézy, abstrakce, komparace a indukce.

Klíčová slova: *Česká republika, republika Běloruska, turistická zařízení, cestovní ruch*

JEL Classification: L83, Z32

Introduction

Tourism is a rapidly growing sector of the economy in most countries the world, and for many people also form an integral part of their life - work or private. The development of tourism is an increasingly popular option for community regeneration. Tourism has been found to stimulate local economies, attract foreign investment, increase business activity, enhance land value, improve community infrastructure and attract the wealthy middle class. (Zeng-Xian and Tak-Kee, 2016)

There are a number of definitions of tourism. Width option definition is linked with the interpretation of the term multidisciplinary. Pásková and Zelenka (2002) defined the concept of tourism as a complex social phenomenon, a summary of the activities of tourists; a summary of the process of building and operation services for tourists including a summary of the activities of people who offer these services and provide; a summary of the activities related to the use, development and protection of resources for tourism; a summary of the political and public-administrative activities, recreation and local communities and ecosystems to these activities.

According to UNWTO is tourism social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. Many travellers seek escape, pleasure, friendships and relaxation (Walby and Piché, 2015) These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which imply tourism expenditure. As such, tourism has implications on the economy, on the natural and built environment, on the local population at the destination and on the tourists themselves. Activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.

The tourism industry, according to Jiang and Ritchie (2017), is a sector with an important specific weight in European economic growth, and it is therefore an economically important industry in which any improvement in the decision-making process will have great economic impact.

According to AIEST (International Association of Scientific Experts in Tourism) is tourism the sum of phenomena and relationships arising from travel and stay of non residents in so far as they do not lead to permanent residence and are not connected with any earning activity.

Tourists traveling to fulfill their dreams and desires, satisfy the need of rest whether by active or passive, the need for learning and acquiring new information and enriched with further experiences. (Wilbert, 2017) There are still new places and destinations tourism, attracting tourists by its extraordinarily beautiful scenery, cultural and historical monuments, rich recreational enjoyment or convenience shopping options.

According to Kesner, Moravec, Novotný and Škoda-Parmová (2008) tourism can indicate directly behind the tourism industry, which also form an extremely broad set of activities and participates in it a number of subjects. A tourism industry

supplies products and services to tourists (for example organize and pleasant traveling, whether recreational or sightseeing). To satisfy his wants and needs has gradually developed a wide range of professions and professional businesses. The width of the tourism industry and in their economic context brings considerable multiplier effect. They include (Galvasová, et al., 2008) those that work in transportation, lodging, entertainment and food & beverage. We must not forget the devices directly promote or organize the development of tourism (travel agencies, municipal and health services, telecommunications, etc.) Tourism industry is also among the top-job creating sectors because its labour intensive nature and the significant multiplier effect on employment in other related sectors. Yet, the sector has a reputation of poor working conditions due to a number of factors: it is a fragmented industry with a majority of employers small and medium sized enterprises with low union density, and work characterized by low wages and low levels of skill requirements, shift and night work and seasonality. (ILO, 2016)

Tourism occurs in areas where development has for its best conditions, i.e. on the coast of warm seas and inland water reservoirs in valleys attractive mountains or in a culturally and historically interesting places. Initially, research on developing tourism focused on these areas. Their research made it possible to monitor users' behavior tourism in tourist centers and their impact on the natural environment visited areas. (Ulus and Hatipoglu, 2016) Tourism Because visitors constantly grew and their impact on the natural environment took on increasingly menacing appearance, experts also began to wonder just what is causing increasing participation of people in the tourism and where the participants come. Such an approach allowed to reveal new the group expects the development of tourism not only in tourism but also in places of permanent residence of tourists.

The Czech Republic has an extraordinary potential for the development of tourism in view of its natural and cultural heritage. In terms of international tourism plays an important role as well as its location in the center of Europe and EU neighborhood countries.

Republic of Belarus is a landlocked country in Eastern Europe and even though numerous wars have resulted in the destruction of many monuments, Belarus have plenty of undiscovered attractions and interesting places visiting by tourists from the West Europe.

Material and Methods

The aim of this paper is to compare a tourism and selected tourist facilities in the Czech Republic and republic of Belarus. The main sources for this research were gained from organizations' websites Czech Statistical Office, National Statistical Committee of the republic of Belarus and selected statistical books. Authors in this paper used analysis of secondary sources and study of documents. As the theoretical methods were used analysis, synthesis, abstraction, comparison and induction.

Research question: Despite the increasing number of the selected tourist facilities in the Republic of Belarus, is the below the level of the tourism facilities in the Czech Republic.

Results and Debate

Czech Republic: Tourism and selected a Tourist facilities

The Czech Republic is divided into 14 regions (NUTS 3), including Prague. The regions are as follows: the Prague region), the South Bohemian region, the Pilsner region, the Karlovy Vary region, the Liberec region, the Ústí nad Labem region, the Central Bohemian region, the Vysocina region, the Hradec Králové region, Pardubický the Pardubice region, the Moravia-Silesian region, the Olomouc region, the Zlín region and the South Moravian region.

A brief introduction of the Czech Republic: (Prague and Czech Republic, 2015)

- Area: 78,866 square kilometres
- Neighbouring states: Germany, Poland, Slovakia, Austria
- Population: 10,54 million (2015)
- Capital: Prague (population 1,28 million, 2015)
- 8,7 million incoming tourists (2015)
- 12 historical monuments on the UNESCO World Heritage List
- More than 200 castles and chateaux
- 40 protected historical towns, 36 Spa towns and resorts, 93 golf courses
- 4 national parks and 24 protected landscape areas,
- Delicious Czech cuisine, local specialities and well-known beer (over 550 local brands).

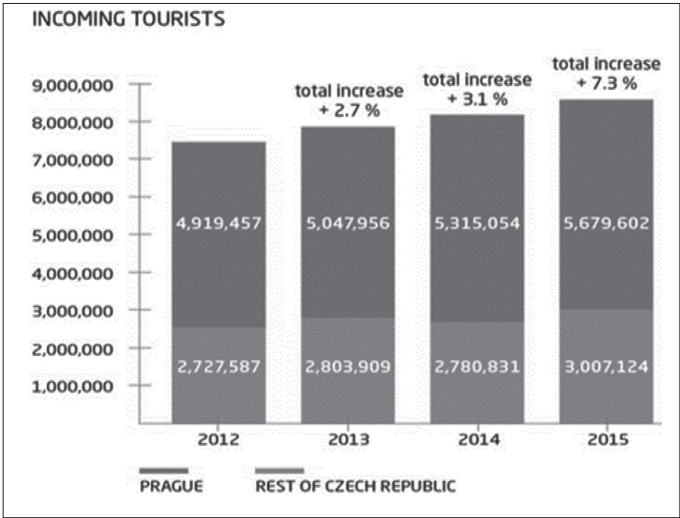
The combination of a pleasant climate, diverse nature and plentiful cultural and historical monuments makes the Czech Republic one of the most popular tourist destinations in Europe. The Czech Republic boasts numerous well-preserved historical sights, many of which are open to the public. Many ancient towns are well preserved or exquisitely restored.

Tourism’s share of GDP in the Czech Republic has been increasing over the last two years from 2.7% in 2012 to 2.9 % in 2013. The number of people employed in tourism is 227 630 in total (2013) and 225 283 in total (2014). The sector’s share of total employment from years 2010 – 2014 has remained relatively stable at around 4,5 %. The direct contribution of Travel & Tourism to GDP in 2014 was CZK 111.4bn (2.6% of GDP). This is forecast to rise by 6.1% to CZK 118.2bn in 2015. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also

includes, for example, the activities of the restaurant and leisure industries directly supported The direct contribution of Travel & Tourism to GDP is expected to grow by 3.6% pa to CZK169.0bn (3.0% of GDP) by 2025. (Travel and Tourism, 2015)

The number of tourists has increased across the whole of the Czech Republic, but Prague still remains the number one attraction, with more than 60 percent of foreign visitors heading to the capital in 2015. Number of the incoming tourists in Prague reached 4 919 457 in 2012 and rest of the Czech Republic 2 727 857. In 2015 visited Prague 5 679 602 incoming tourists and rest of the Czech Republic in the same year 3 007 124 incoming tourist, see graph 1.

Graph 1: Development of the incoming tourists in the Czech Republic in 2012-2015



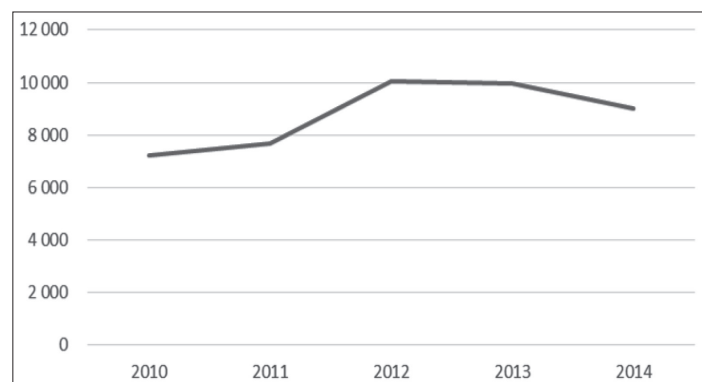
Source: Prague Airport. 2015. Tourism and Economy. [Accessed 10.09.2016]. Available at: <http://www.prg.aero/en/business-section/aviation-business/reasons-for-prague/tourism-and-economy>

Accommodation and catering facilities represent an essential a part of tourism facilities in the Czech Republic, which ensures the realization of tourism. Capacity of the area limits further the construction of these facilities. Structure beds adapts the character of localization assumptions and has a permanent or seasonal character. Catering equipment used by participants Tourism to meet the needs of food, but also the interests of various forms of entertainment: Restaurants, cafeterias, grills, snack bar, bars, wine bars, cafes, pubs, chalets, huts, etc. A group of other tourist facilities in the Czech Republic include complementary forms of tourists facilities used for recreation (playgrounds, swimming pools, saunas, gyms, bowling, ski slopes, ski trails, ski lifts, waterslide, water skiing, tennis courts, mini golf, golf, playgrounds,

amphitheaters, etc.). We must not forget the devices directly promote or organize the development of tourism (travel agencies, information agencies, municipal and health services, telecommunications, etc.).

In the Czech Republic reached the number of the collective accommodation establishments 7 235 with bed places 449 068 in the year 2010. The maximum number of the collective accommodation establishments reached in the year 2012 with 10 057 and bed places 560 401. In the year 2014 declined number of collective accommodation establishments and reached 9 013 with 519 909 bed places.

Graph 2: Development of the collective accommodation establishments in the Czech Republic, 2010–2014



Source: Own, based data of Czech Statistical Office

In the Czech Republic between 2010 – 2013 were active more than 50 000 tourism enterprises, divided into food and beverage service activities. In the year 2010 in the Czech Republic were active 51 405 enterprises. In the year 2013 declined number of enterprises and reached total 50 221, see Table 1.

Table 1: Total active enterprises of food and beverage services in the Czech Republic, 2010 – 2013

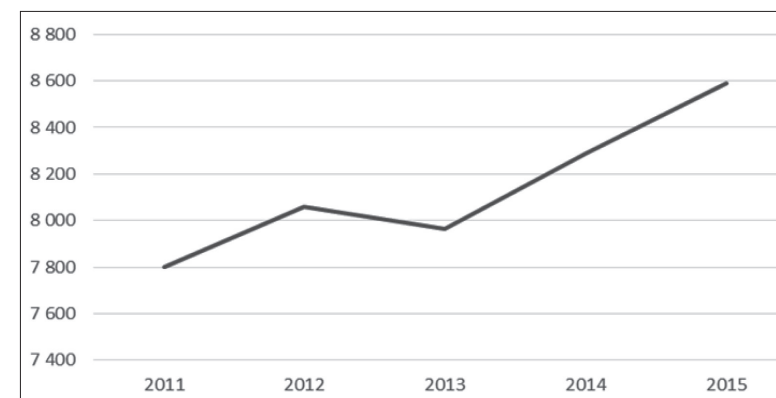
2010	2011	2012	2013	Indicator
51 405	51 329	51 537	50 221	Active enterprises, total

Source: Czech Statistical Office

In the Czech Republic operates more than 8 500 travel agencies and tour operators. They are specialized in incoming and outgoing tourism. Tour operators mainly specializes in the following: accommodation, transfers and transportation, guide services, restaurants and entertainments, sightseeing tours, city tours and excursions, etc. For example, Exim Tours, Firo Tour, Alexandria, Fischer, Čedok belongs to most popular tour operators in the Czech Republic. On the other hand is Invia the biggest and most popular internet travel agency in the Czech Republic and providing more than 8000 package tours from over 300 renowned tour operators

on the Czech and Slovak market. The graph below shows the development of the number of travel agencies and tour operators in the Czech Republic between 2011 and 2015. The number of tour operators and travel agencies to decline in 2012 from 8059 to 7965 in 2013. Between 2014 and 2015 reached the number of tour operators and travel agencies 8288, respectively 8590. The number of tour operators in the Czech Republic does not exceed 15% from 8590.

Graph 3: The number of travel agencies and tour operators in the Czech Republic, 2011 – 2015



Source: Own, based data of Czech Statistical Office.

Republic of Belarus: Tourism and selected a Tourist facilities

The Republic of Belarus is divided into oblasts, districts and other administrative units. The administrative division of the state is regulated by the legislation. There are six administrative regions (oblasts) in Belarus – Brest Oblast, Vitebsk Oblast, Gomel Oblast, Grodno Oblast, Minsk Oblast, Mogilev Oblast and the city of republican subordination Minsk. The oblast is an optimal unit of the social and economic organization of the country.

A brief introduction of the Republic of Belarus:

- Area: 207,600 square kilometres
- Neighbouring states: Russia, Ukraine, Poland, Lithuania, Latvia
- Population: 9.498,4 million (2015)
- Capital: Minsk (population 1,417 million, 2015)
- 137 444 incoming tourists (2014)
- 4 Belarus sites have been already included into the UNESCO World Heritage List and Belarusian rite of the Kolyady (Christmas) Tsars, UNESCO World Intangible Cultural Heritage

- Belarus is a very green landscape. Natural vegetation covers 93.1% of the land, and 1/3 of all green landscape is forest. In Belarus forests, 28 types of trees as well as around 70 types of shrubberies can be found.
- There are four national parks and two reserves in Belarus
- More than 5 000 Immovable heritage properties (2015)
- A lot of dishes of the Belarusian national cuisine may be exotic for many foreigners.

According to the economic impact 2015 in the Republic of Belarus, the direct contribution of Travel & Tourism to GDP in 2014 was BYR 14,239.3bn (1.9% of GDP). This is forecast to rise by 1.1% to BYR 14,394.8bn in 2015. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported. The direct contribution of Travel & Tourism to GDP is expected to grow by 3.5% pa to BYR 20,360.1bn (1.8% of GDP) by 2025.

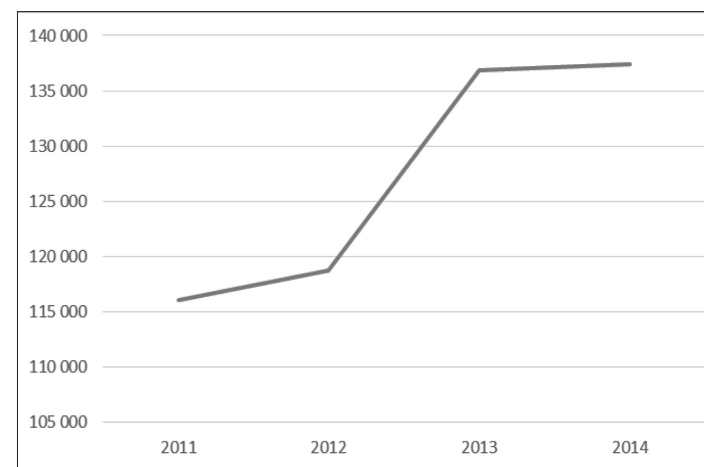
Travel & Tourism in the Republic of Belarus generated 77,000 jobs directly in 2014 (1.7% of total employment) and this is forecast to fall by 0.3% in 2015 to 76,500 (1.7% of total employment). This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

By 2025, Travel & Tourism will account for 71,000 jobs directly, a decrease of 0.7% over the next ten years.

The most frequently visited foreign countries in 2014 traditionally were Russia, Bulgaria, Greece, Egypt, Spain, Italy, Lithuania, Poland, Turkey and Czech Republic. These countries accounted for 82.7% of total organised tourist travels abroad. The number of organised tourist travels abroad was still prevailing over the number of visits. In 2014 there were five travels of Belarusian nationals abroad (six in 2005) per each visit of foreign tourists to Belarus.

The number of organised visits was 137.4 thousand in 2014, which is 0.5% more than in 2013. There were 115.6 thousand visits from the Commonwealth of Independent States - CIS countries (up 1.3% over 2013), see graph 4. The leadership in terms of organised tourists among the Commonwealth states remained with Russia – 113.2 thousand visits (up 1.7% compared with 2013) and Ukraine – 1.8 thousand visits (down 10.3% compared to 2013). Among the non-CIS countries, the largest number of visitors came to Belarus from Germany, Italy, Latvia, Lithuania, Poland, United Kingdom, and Turkey. In 2014 these countries made up 48.3% of total tourist arrivals from non-CIS countries (56.4% in 2013). The average duration of stay of foreign tourists in Belarus in 2014, as in 2013, was 4 days.

Graph 4: Arrivals of foreign tourists to the Republic of Belarus, 2011 - 2014

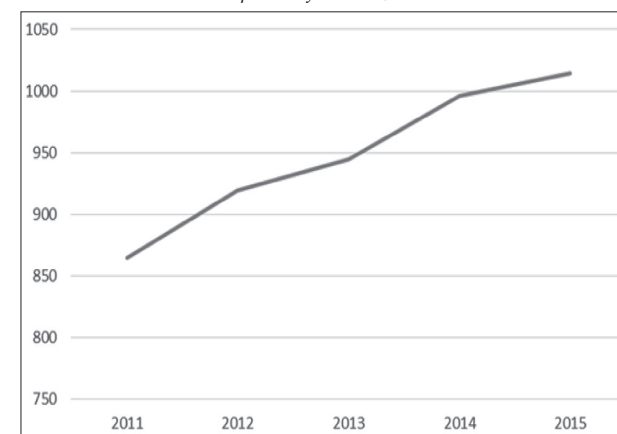


Source: Own, based data of National Statistical Committee of the Republic of Belarus

Number of tourist in 2015 reached 276 260, but from 2015 taking into account excursionists too.

In the Republic of Belarus reached the number of the collective accommodation establishments 865 with bed places 33 689 in the year 2011. The maximum number of the collective accommodation establishments reached in the year 2015 with 1014 and bed places 39 161.

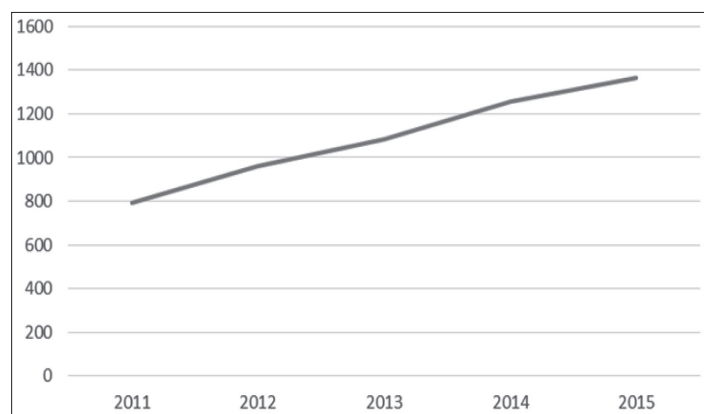
Graph 5: Development of the collective accommodation establishments in the Republic of Belarus, 2011-2015



Source: Own, based data of National Statistical Committee of the Republic of Belarus

In the Republic of Belarus operates more than 1 300 travel agencies and tour operators. Tourism organizations of the Republic of Belarus providing recreation and travel services within the territory of Belarus, see graph 6. The graph below shows the development of the number of travel agencies and tour operators in the Republic of Belarus between 2011 and 2015. The number of tour operators and travel agencies in 2011 reached 791 tourism organizations and in 2015 already 1 364 tourism organizations. In last 5 year grew the number of tourism entities more than 570 organizations.

Graph 6: The number of travel agencies and tour operators in the Republic of Belarus, 2011 – 2015



Source: Own, based data of National Statistical Committee of the Republic of Belarus

Tourism organizations proposes various Belarus tours. The incoming Belarus tourism is one of their priorities. For example, Alatan Tour, Belintourist, SMOKtravel, Vneshintourist, Vokrug Sveta belongs to most popular tour operators in the Republic of Belarus. Tour operators provides all regarding Belarus tourism: hotels, recreation centres, tourist centres all over the country, comfortable vehicles and other services at most competitive prices. Some of them specialize in agricultural, hunting, excursion or business tours to Belarus.

According to the National Statistical Committee of the Republic of Belarus, are Belarusian products known abroad thanks largely to the food industry: dairy, meat, confectionery brands, which have won consumer preferences due to their naturality, taste and competitive price. Over the recent years, Belarus has received the status of one of the leading exporters of food products. The food industry includes more than two dozen spheres with numerous specialized productions. The largest are meat, dairy, confectionery, sugar, brewery and soft drinks productions. In the last years in the Republic of Belarus more than 800 enterprises were operating in the food and beverage industry (or about 7.3 percent of all manufacturing enterprises).

Tourism development is one of the main tasks of the social and economic policy in Belarus. The main potential of tourism in Belarus lies in the beauty and diversity of its nature, its unique historic and cultural heritage and the people themselves – very hospitable, diligent and tolerant. While good roads, rich nature, tolerant people and high level of security contribute to the development of tourism in Belarus there are several factors that dwarf its development. If the infrastructure – hotels, recreation resorts, roads, etc. – mainly the heritage of the Soviet era – is not upgraded to meet the European standards, the progress will be very slow. Most visitors to Belarus need a visa that is sometimes is not easy to obtain. Not that it is such a hard process like in case with a Belarusian applying for a Schengen visa. (Tourism in Belarus, 2011)

Conclusion

The Czech Republic has an extraordinary potential for the development of tourism in view of its natural and cultural heritage. In terms of international tourism plays an important role as well as its location in the center of Europe and EU neighborhood countries. Republic of Belarus is a landlocked country in Eastern Europe and even though numerous wars have resulted in the destruction of many monuments, Belarus have plenty of undiscovered attractions and interesting places visiting by tourists from the West Europe.

Research question, based on the analysis, was confirmed. In the Czech Republic in the year 2014 reached number of collective accommodation establishments 9 013 with 519 909 bed places. In the Republic of Belarus the maximum number of the collective accommodation establishments reached in the year 2015 with 1014 and bed places 39 161. In the Czech Republic between 2010 – 2013 were active more than 50 000 tourism enterprises, divided into food and beverage service activities. In the Republic of Belarus in the last years more than 800 enterprises were operating in the food and beverage industry (or about 7.3 percent of all manufacturing enterprises). In the Czech Republic operates more than 8 500 travel agencies and tour operators. They are specialized in incoming and outgoing tourism. In the Republic of Belarus operates more than 1 300 travel agencies and tour operators. Tourism organizations of the Republic of Belarus providing recreation and travel services within the territory of Belarus.

Tourism industry is very important to a country's economy, particularly in less developed regions, where it can drive growth. Tourism industry also tends to have important impacts on the environment and society at large. Comfortable hotels, accommodation facilities, catering facilities and other tourism services play a very important role in popularizing any tourist destination. If a person, who is far away from home, gets to enjoy the same facilities and comforts as he enjoys at his home, then he is bound to become attached to the place.

And what is for example important for tourism industry in every destinations?

- focus on maximizing gain and maintaining the long-term achievement of the tourism enterprises by using resources such as staff, capital, and other sources,
- focus on human resource development and education in the tourism sector,
- planning and marketing effectively,
- compete prosperously in the inbound and outbound marketplace, etc.

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JAK ČESKÉ DĚTI A JEJICH RODIČE VNÍMAJÍ
REKLAMNÍ SDĚLENÍ

HOW CZECH CHILDREN AND THEIR PARENTS PERCEIVE
ADVERTISING

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Abstract

Objective of our research was to identify, whether children of two age groups 8-11 and 13-16 feel to be influenced by advertising in their decision making process and if yes, by what type of advertising. We also studied if and what differences are among the two age groups and among the children and their parents in the same age group. The research confirmed that both age groups do perceive influence of advertising and they realize it comes from various sources, which they are able to identify. The same perception have also the parents. From the main findings the most interesting is the dramatic difference in the perceived influencers among the two age groups and the growing gap between perception of children and their parents with growing age. Our findings may play important role in considering educational tactics in respect to advertising.

Key words: *advertising targeted to children, childrens' perception of advertising, parents perception of advertising, communication channels targeted to children*

Abstrakt

Cílem našeho výzkumu bylo identifikovat, jestli a jaké reklamní vlivy vnímají děti dvou věkových kategorie 8-11 a 13-16 a jejich rodiče v České republice a zda jsou odlišnosti s narůstajícím věkem dítěte či mezi názorem dítěte a jeho rodiče. Výsledky výzkumu ukázaly, že obě věkové kategorie dětí vliv reklamy vnímají a uvědomují si, že přichází z různých zdrojů, které jsou schopny identifikovat. To samé si uvědomují i jejich rodiče, ale jejich názory se od vnímání dětí často odlišují. Hlavní závěry především identifikovaly rapidní rozdíl ve vnímání jednotlivých vlivů v rámci obou dětských kategorií a s věkem rostoucí odlišnost v názorech dětí a jejich rodičů.

Klíčová slova: reklama cílená na děti, vnímání reklamy dětmi, vnímání reklamy rodiči, komunikační kanály cílené na děti

JEL Classification: M31, M37, M38

Úvod

Reklama cílená na děti a potažmo její regulace je již delší dobu předmětem mnohých výzkumů a hluboké, někdy až emotivní diskuse. Na jedné straně zadavatelé reklamy obhajují její důležitost jakožto zdroje informací a zaštiťují se právem mladých lidí na informace, které reklama poskytuje a která má být primárně regulována interními firemními kodexy, samoregulací prostřednictvím národních kodexů a teprve poté legislativními akty (International Chamber of Commerce., 2006). Na straně druhé odpůrci reklamy cílené na děti a převážně zastánci její silnější regulace hovoří o negativním vlivu reklamy na děti především v důsledku jejich neschopnosti plně chápat její přesvědčovací obsah a účel. Obecně převládá názor, že na reklamu lze pohlížet jako na jeden z faktorů, který spoluvytváří základní hodnoty, postoje a životní názory mladých lidí (Grundey, 2007)

Mnohé výzkumy ukazují, že atraktivnost dětí jako cílové skupiny v posledních desetiletích významně roste. Ačkoli děti byly původně vnímány především jako potenciální budoucí zákazníci, postupem času se z nich stala atraktivní cílová skupina, především díky jejich rostoucím disponibilním finančním zdrojům. Výzkum ukázal, že děti do 14 let věku utratily v roce 1996 ve Spojených státech více jak 24 miliard USD a ovlivnily rodinné nákupy v hodnotě 188 miliard USD (Macklin, et al., 1999). A odhaduje se, že výdaje dětí vzrostly v průběhu 20 let o více, jak dvojnásobek v roce 2006 činily již \$51,8 miliard (Schor, 2006). Výzkum z Velké Británie zkoumající finanční zdroje dětí ukázal, že v roce 2008 disponovaly děti v UK více jak 8,9 miliardami britských liber, přičemž tyto finanční zdroje pocházely z kapesného, pravidelných příspěvků od rodičů (např. na obědy a podobně) a jednorázových příjmů (např. příležitostné brigády, dary od rodičů a prarodičů) (Marshall, 2010). Své výdaje děti směřují převážně do několika málo produktových kategorií, kterými jsou cukrovinky, nealkoholické nápoje, rychlé občerstvení, časopisy, hudba a filmy (Marshall, 2010). Není tedy divu, že děti se staly zajímavou cílovou skupinou pro marketéry, především v těchto produktových kategoriích. Odhaduje se, že již v roce 1996 firmy jen ve Spojených státech utratily 894 milionů USD za reklamu cílenou na děti (Macklin, et al., 1999) a tyto výdaje rostou úměrně příjmům dětských spotřebitelů.

Jak již bylo zmíněno, děti představují z hlediska reklamního působení zvláštní skupinu spotřebitelů – obecně jsou citlivější na podněty emocionální povahy a dokáží obtížněji odlišit fikci od reality, a to především proto, že zatím nemají dostatek zkušeností. Jejich progres v oblasti spotřebitelského chování se vyvíjí s rostoucím věkem dětí. Odborníci a výzkumníci nejsou sice jednotní v názoru, jakým způsobem reklama ovlivňuje děti a jejich chování, ale existuje shoda v tom, že děti v rozdílném věku vnímají reklamu, a rozumějí jejímu informačnímu a přesvědčovacímu obsahu

reklamy odlišně. Podle Deborah Roedder výzkumy, které proběhly v horizontu 25 let, ukázaly, že děti v různém věku jsou schopny vnímat a rozumět přesvědčovacímu vlivu reklamy odlišně: zatímco pouze 52,7% dětí ve věku 6-7 let chápe přesvědčovací účel reklamy, ve věkové skupině 8-9 je to už 87,1% a ve věkové skupině 10-11 let už dokonce 99% dětí. (Roedder D., 1999). Co ale výzkumy též zdůrazňují, že schopnost dětí rozpoznat přesvědčovací účel reklamy by neměl být vykládán jako schopnost dětí se reklamě účinně bránit; jednotlivé reklamy mohou být velmi přesvědčivé pro děti nejméně stejně jako pro dospělé (Roedder D., 1999, (Elliott, 2013)

S ohledem na tuto skutečnost, legislativa regulující reklamu ve většině rozvinutých zemí vymezuje specifika reklamy cílené na děti a přesně definuje pojem dítěte. V členských zemích EU jsou děti nejen pro tyto účely, definovány jako osoby mladší osmnáct let s výjimkou Rakouska, kde je za věkový limit považován věk 19 let. V České republice je obecně přijímáno rozdělení na předškolní věk, mladší školní a starší školní věk, někde se tyto tři skupiny dále dělí. Studie mediální gramotnosti zpracovaná na zadání Rady pro rozhlasové vysílání, rozděluje skupinu dětí na předškoláky (5-6 let), mladší školáky (8-10) a starší školáky (12-14 let) (Lhotáková Markéta, 2014)

Mnohé výzkumy se zaměřují na schopnosti dětí porozumět informačnímu, ale především přesvědčovacímu obsahu reklamy. Méně výzkumů se zaměřuje na postoj dětí k reklamě a jejich názor na reklamu a ještě méně na postoj jejich rodičů a jejich vnímání vlivu reklamy na jejich děti. Přitom rodiče sehrávají klíčovou roli při vzdělávání dětí o obsahu a vlivu reklamy, tzv. socializaci dětí. Pod pojmem socializace rozumíme “ Proces, během kterého mladí lidé získávají dovednosti, znalosti a postoje relevantní pro jejich fungování jakožto spotřebitelů v tržním prostředí.” (Ward, 1974)

Cílem našeho výzkumu je zjistit, jaký mají děti dvou různých věkových skupin postoj k reklamě, do jaké míry si připouštějí, že jsou ovlivňovány reklamou, případně kde a jakou formou. Stejný výzkum byl proveden s rodiči těchto dětí (opět z obou věkových kategorií). Výsledky dotazování byly porovnány mezi oběma věkovými skupinami dětí, tak aby byl identifikován případný vývoj v jejich chování a postoji k reklamě. Porovnány byly též výsledky dotazování rodičů u dětí, tak aby byly identifikovány případné odlišnosti v jejich názorech na reklamu. Cílem bylo zjistit, jaké vlivy na děti působí při nákupním rozhodování, které typy reklamy a komunikačních kanálů děti považují za nejvlivnější a kde na ně reklama nejčastěji působí. Výsledky jsou srovnány pro obě věkové kategorie a pro skupinu dětí a rodičů navzájem. Výzkum se též zaměřil na postoj dětí i jejich rodičů k reklamě a její regulaci.

Metodologie výzkumu

Pro účel tohoto výzkumu byly stanoveny 2 věkové kategorie dětí a to 8-11 let a 13-16 a tomu odpovídající dvě skupiny jejich rodičů. V těchto 4 cílových skupinách bylo provedeno dotazníkové šetření, které proběhlo v říjnu a listopadu roku 2015. Výzkumu se zúčastnily děti a jejich rodiče ze 4. a 5. třídy, respektive 8. a 9. třídy Základní školy Leoše Janáčka Hukvaldy, studenti Gymnázia Petra Bezruče ve Frýdku-

Místku (věk 13-16 let), dále děti navštěvující Dům dětí a mládeže v Plesně u Ostravy (obě věkové kategorie), a děti a rodiče, jež jsou členy sportovního klubu Slavistická školička v pražském Edenu (věk 8-11 let). Celkově bylo zodpovězeno 183 dotazníků, a to v následujícím rozdělení:

- 42 – děti ve věku 8-11 let
- 49 – rodiče dětí ve věku 8-11
- 71 – děti ve věku 13-16
- 21 – rodiče dětí 13 - 16

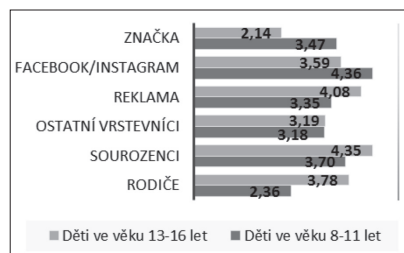
Jednotlivé otázky dotazníku nebyly povinné, tudíž odpovědi respondentů kolísaly v závislosti na porozumění dané otázce. Přesto však byly odpovědi z neúplných dotazníků zařazeny do výsledků.

K analýze některých otázek, jež měly za úkol především porovnávat a hodnotit jednotlivé odpovědi, byl využit aritmetický průměr. Pro jasnější deklaraci výsledků bylo využito aritmetického průměru z bodů získaných jednotlivými vlivy při vzájemném hodnocení faktorů, jež se komparovaly na stupnici 1-6. Získané průměry byly poté v rámci otázky seřazeny, což v závěru znamenalo celkové vyhodnocení vztahů jednotlivých odpovědí a určení nejsilnějších resp. nejslabších vlivů či faktorů. K analýze výsledků byla použita aplikace společnosti Google pro distribuci a zpracování dotazníkových šetření, dále pak počítačový program Excel k vytvoření grafických prezentací.

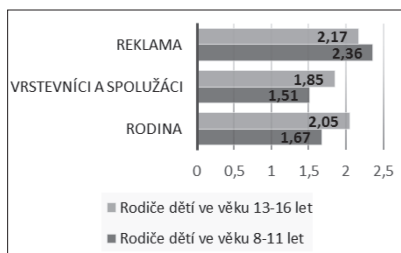
Výsledky

V úvodní část výzkumu děti hodnotily jednotlivé faktory/vlivy které je, respektive jejich spolužáky, ovlivňují při nákupním rozhodování. Na stejnou otázku pak odpovídali i jejich rodiče. Výsledky znázorňují grafy 1 a 2.

Graf 1 - Co si dítě myslí, že jeho spolužáky ovlivňuje při nakupování nejvíce.



Graf 2 - Co z uvedeného si rodič myslí, že nejvíce ovlivňuje spotřební chování jeho dítěte.



Zdroj: Plesníková (2016)

Z výsledku plyne, že mladší děti ve věku 8-11 let se domnívají, že na jejich kamarády má nejsilnější vliv při nákupním rozhodování jejich blízké sociální okolí – nejvíce je ovlivňují rodiče, následování s nemalým odstupem „ostatními vrstevníky“. Až na třetí místo podle významu se umístila reklama a „značka“, jako dva nejsilnější marketingové nástroje komunikace s touto věkovou kategorií dětí. Možná trochu překvapivě relativně malý vliv mají podle dětí „sourozenci a sociální sítě „Facebook/Instagram“. Rodiče dětí ve věku 8-11 let si uvědomují svůj vliv na děti i když za ještě vlivnější posuzují shodně „sourozence a vrstevníky“, naopak reklamě přisuzují relativně nejmenší váhu.

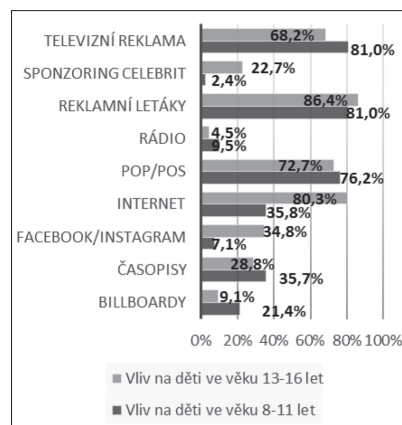
Starší děti hodnotí sféru působení na sebe sama značně odlišně od mladších dětí. V sociální sféře značně ztrácejí na vlivu rodinní příslušníci – především rodiče ale i sourozenci, zatímco vliv vrstevníků / spolužáků se nemění. U starších dětí významně narůstá vliv marketingových nástrojů. I když teenageři odmítají reklamu (přisuzují ji velmi nízký vliv), ale přiznávají, že zdaleka nejvýznamnější vliv na jejich nákupní chování mají značky. Značky, jejich budování a komunikace jsou tedy z pohledu marketérů velmi významným nástrojem komunikace s touto věkovou kategorií.

U starších dětí se názory rodičů na to, co ovlivňuje nákupní rozhodování jejich dětí značně odlišují od samotného názoru dětí. Rodiče především vnímají svůj vliv za významnější, než jej považují děti – „rodina“ se umístila na 2. místě. Za nejméně vlivnou považují rodiče relativně správně spolužáky a vrstevníky. Reklamu (včetně vlivu značky) považují rodiče těchto dětí za nejméně vlivnou. To by se shodovalo s názory dětí pouze za předpokladu, že značka není vnímána jako přesvědčovací nástroj marketingové komunikace. O tom lze však v realitě značně pochybovat.

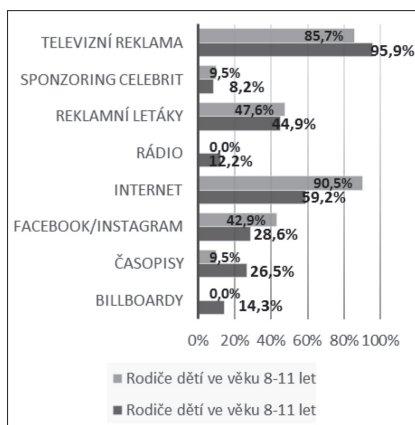
Všichni zúčastnění, tedy děti obou věkových kategorií i jejich rodiče se shodli, že reklama a další formy marketingové komunikace mají na děti a jejich nákupní rozhodování vliv. Ptaly jsme se tedy dětí i jejich rodičů v obou věkových kategoriích, které marketingové komunikační kanály se domnívají, že mají na děti největší vliv.

Nejvíce vnímaným mediátorem reklamy u dětí ve věku 8-11 let se stala televize a reklamní letáky, se kterými se setkávají nejčastěji doma. Třetím významným prostředkem se pak stala reklama umístěná v obchodech. Oproti tomu rodiče největší význam přikládají televizi, to s velkým náskokem na druhý internet. Celkově lze tedy říci, že rodiče v rámci této věkové kategorie přeceňují význam internetu, a to na úkor reklamních letáků, který je naopak podceňován.

Graf 3 - Která reklama dítě nejvíce ovlivní, když si kupuje něco nového?



Graf 4 - Které médium si rodič myslí, že jeho dítě ovlivňuje nejvíce?



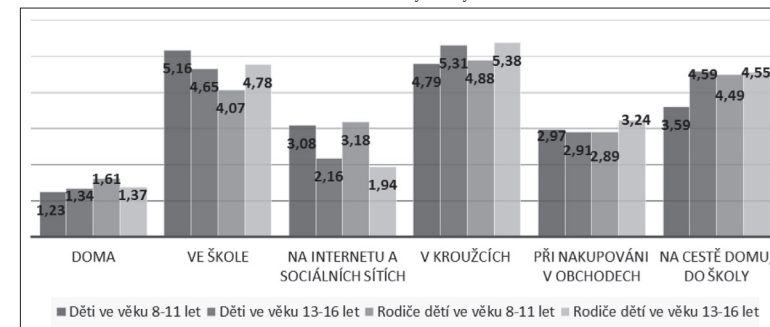
Zdroj: vlastní autorů na základě: Plesníková (2016)

Názor rodičů dětí ve věku 13-16 o vlivu marketingové komunikace na své děti se odlišuje, a to podstatně více než se liší názory dětí a rodičů v nižší věkové kategorii. Z pohledu rodičů je nejvlivnějším médiem, které děti ovlivňuje, reklama na internetu, s malým odstupem pak reklama televizní. Podstatně menší vliv pak rodiče přisuzují „reklamním letákům“ a reklamními sděleními na sociálních sítích Facebook/Instagram.

Zajímavé je také vědět nejen jaké komunikační kanály na děti působí, ale také kde se děti s těmito reklamními vlivy nejčastěji setkávají. Zde se, jak ukazuje následující graf 5, názory dětí obou věkových skupin i jejich rodičů nijak zásadně neliší.

Děti obou věkových skupin jsou nejčastěji vystaveny reklamním vlivům v domácím prostředí, kde dotazovaní zohledňovali například přítomnost televize, akčních letáků, počítače či rádia, a to s velkým předstihem před ostatními lokalitami. Relativně velkou váhu má také vliv reklamy v obchodech, kde se opět všechny 4 skupiny dotazovaných na míře vlivu shodly.

Graf 5 - Kde vidí dítě reklamu nejčastěji? Kde si rodič myslí, že jeho dítě vidí reklamu nejčastěji?



Zdroj: Plesníková (2016)

Protipólem s relativně malým reklamním vlivem byla škola, zájmové kroužky a trochu překvapivě i cesta do školy, kde respondenti (krom dětí ve věku 8-11), přisoudili dosti malý vliv venkovní reklamě. Jako samostatná kategorie byl vyloučen internet a sociální sítě, které se velmi často nevážají na žádnou lokalitu, neboť je děti mohou sledovat kdekoli především prostřednictvím mobilních aplikací. Byla to také jediná odpověď, ve které se názor mladších respondentů a jejich rodičů rozcházel s názorem starších dětí a jejich rodičů, kteří zcela dle očekávání přisoudili druhou nejvyšší váhu. U mladších dětí však hraje internet a sociální sítě podstatně menší roli a vyšší váhu má vliv reklamy v obchodech.

Internet a sociální sítě jsou komunikačním kanálem s nejrychlejší rostoucí vlivem, který je pro děti a mládež zcela přirozenou součástí života. Stále více výzkumů se tedy soustřeďuje na roli tohoto komunikačního kanálu i na děti. Nás ve výzkumu zajímalo, krom vlivu, který mu přisuzují, i kolik času děti sledováním těchto nových médií tráví a co na nich vyhledávají.

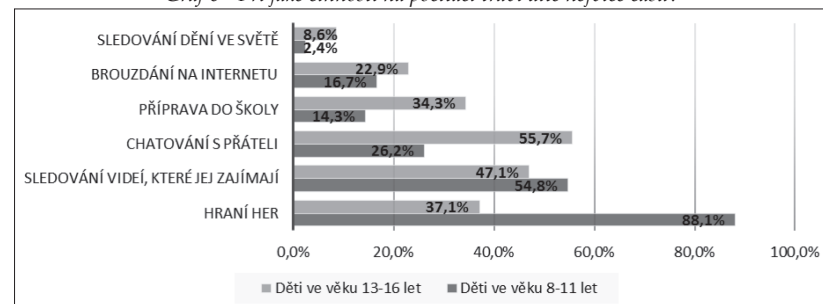
Důležitým předpokladem pro tuto otázku je přístup dětí k těmto technologiím. Z našeho výzkumu vyplývá, že ze vzorku mladších dětí (8-11 let) mají všechny děti doma k dispozici počítač s připojením k internetu, přičemž 46,3 % z těchto dětí u něj není denně nebo s ním stráví méně než hodinu za den. Zbylých 29,3 % jej využívá 1-2 hodiny denně a 24,4 % dětí tráví u počítače více než 3 hodiny během jednoho dne. Nejčastěji jej využívají ke hraní her (88,1 %), ke sledování videí a blogů, které je zajímají (54,8 %) nebo k chatování s přáteli (26,2 %). Více než polovina dotázaných dětí se dle vlastního názoru o reklamy vůbec nezajímá a konstatuje, že produkty nakupuje pouze v kamenných obchodech. Oproti tomu 31 % dětí přiznává, že během doby strávené na internetu občas narazí díky reklamě na produkt, který později chtějí získat.

Též všichni respondenti ze skupiny starších dětí mají přístup k počítači i internetu. V souladu s předchozími výsledky děti potvrdily, že tráví více času u internetu než děti z mladší skupiny. Polovina z nich tráví u počítače 1-2 hodiny denně, něco přes ¼ (26,4%) tráví u počítače více než 3 hodiny denně. Významné ale je, že 46,5%

děti přiznává, že v této době narazí na reklamu na produkt, který by chtěly získat, téměř 1/3 dětí v tomto věku dokonce aktivně produkty o které má zájem vyhledává a zjišťuje si o nich informace.

Jak děti obou věkových skupin tráví čas na internetu ukazuje následující graf 6.

Graf 6 - Při jaké činnosti na počítači tráví dítě nejvíce času?



Zdroj: Plesníková (2016)

Činnost mladších dětí na počítači je relativně shodná - převážně se věnují hraní her a v menší míře sledují videa. Podstatně méně se pak věnují chatování s přáteli (nejoblíbenější činnosti dětí ze starší skupiny) a brouzdání po internetu. Pro přípravu do školy používá počítač pouze necelých 15% v této věkové kategorii. Téměř 50% rodičů dětí v tomto věku ví, jak se jejich dítě na internetu chová a varuje dítě před možnými riziky. Další 28,6% rodičů se snaží omezit přístup dítěte na síť a zbylých 16,3% se spoléhají spíše na zralost dítěte, jelikož se sami na internetu neorientují. Na otázku, zda mají přehled o tom, zda a jaké dítě hraje on-line hry, odpovědělo 50% rodičů, že ano a že ví o skutečnosti, že tyto hry jsou často komercializovány. Překvapivých 41,7% rodičů pak odpovědělo, že dítě má on-line hry zakázány. Tento fakt je v rozporu s tvrzením dětí a nabízí se tedy předpoklad, že děti hrají hry tajně, tedy bez vědomí svých rodičů.

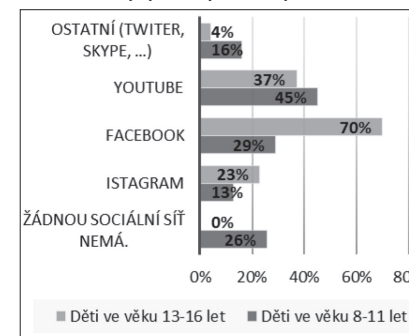
Užití počítače staršími dětmi se velmi radikálně liší. Nejvíce se věnují chatování s přáteli (přes 55%), což potvrzuje sociologický trend nahrazování osobního setkávání on-line diskusí a používáním telefonů. Velké množství času na internetu dále věnují sledování videí a ještě o něco méně hraním her (ve srovnání s mladšími dětmi významný pokles!). Příprava do školy zaujímá až 4. místo a ještě o něco méně času tyto děti tráví brouzdáním na internetu.

Analýza dotazníkového šetření mezi rodiči starších dětí poskytla relativně stejné výsledky, s jakými jsme se již setkali u mladších rodinných zástupců. Je zde však vidět rozdíl v chování rodiče vůči dítěti v oblasti zakazování, kdy se pouze jeden z dotazovaných rodičů snaží omezit přístup dítěte k internetu a 23,8% rodičů přiznává, že neví, co dítě na internetu dělá, ale věří, že v případě nutnosti jej požádá o pomoc.

V předchozí části výzkumu děti často uváděly, že tráví svůj čas na sociálních sítích. Zajímalo nás tedy, které sociální sítě děti preferují a je-li rozdíl mezi mladší skupinou dětí a starší. Jak graf 7 ukazuje všechny starší děti používají alespoň

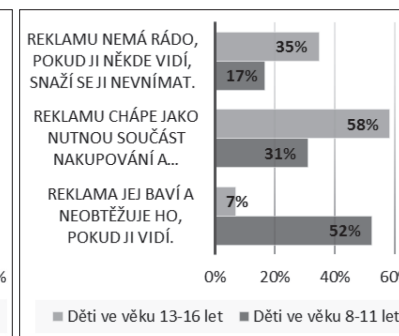
jednu sociální síť a preferují především sociální sítě, které mají i mobilní aplikace - nejoblíbenější je Facebook, s velkým odstupem následovaný Youtube a Instagramem.

Graf 7 - Má dítě vlastní účet na nějaké sociální síti? Pokud ano, která sociální síť je jeho nejoblíbenější?



Zdroj: Plesníková (2016)

Graf 8 - Jaký má dítě názor na reklamu?



V souladu s výsledky předchozí otázky, mladší děti ze sociálních sítí nejčastěji používají Youtube, kde sledují videa. S ohledem na skutečnost, že chatování s přáteli a brouzdání na internetu není v této věkové skupině ještě příliš oblíbené, jsou sociální sítě Facebook a Instagram relativně málo rozšířené. Jde též o hledisko bezpečnostní. I v našem dotazníkovém šetření některé z mladších dětí uvedly, že byly prostřednictvím sociálních sítí kontaktovány neznámými osobami.

Na závěr nás zajímalo, jaký názor mají děti na reklamu a zda se tento názor formuje s věkem. Graf 8 ukazuje, jak radikálně se v průběhu krátké doby (cca 2-3 let věku) tento názor mění. Více jak polovina mladších dětí považuje reklamu za zábavnou, a skoro 1/3 ji chápe jako nutnou součást nakupování. Naopak více jak polovina starších dětí chápe reklamu jako nutnou součást života, více jak 1/3 ji nemá ráda a snaží se ji nevnímat (alespoň podle svého vyjádření) a jen 7% ji má rádo.

Diskuse

Podle průzkumu provedeného v roce 2012 agenturou Mediaresearch tráví děti a mladiství konzumací mediálního obsahu v průměru čtyři hodiny denně. Nejvíce času pak tráví děti před televizními obrazovkami, kdy naprostá většina sleduje televizi denně nebo téměř denně. Podle výsledků pak starší děti rovněž využívají internetu nebo poslouchají rádio či hudbu (Mediaresearch, 2012). Náš výzkum v tomto ohledu sledoval pouze čas strávený na internetu a ukázal jednoznačný trend - s věkem čas strávený na internetu roste a významně se mění i obsah směrem k častější konzumaci komerce a reklamnímu sdělení. Výsledky našeho výzkumu ukázaly, že si děti v obou věkových kategoriích uvědomují, že na ně reklama a další formy marketingové komunikace působí.

S ohledem na postoj dětí k vlivům reklamy, které na ně dle jejich vnímání působí, přinesl výzkum některé zajímavé závěry. Významný je především posun v konzumaci médií a s tím souvisejících reklamních vlivů, ke kterému dojde v průběhu průměrně 3 let věku dítěte. Mladší děti ve výzkumu přiznávají, že na jejich nákupní a spotřební chování mají největší vliv rodiče a jejich vrstevníci. Vliv blízkého sociálního prostředí (primárně rodiny) převažuje nad externími vlivy médií. Z tohoto pohledu by se dal vyvodit závěr, že vliv reklamy u mladších dětí je nejsilnější především prostřednictvím televize (ve výzkumu jej potvrdilo 81% dětí a 95% rodičů) a reklamních letáků (83% dětí a 45% rodičů), a to primárně v domácím prostředí. Tento fakt potvrzuje i nedávný výzkum provedený na panelu 707 českých matek. Podle něho se 92% respondentů domnívá, že na děti nejsilněji působí televizní reklama, 80% respondentek deklaruje reklamu v místě prodeje, 74% respondentek potvrzuje internet, dále pak tiskovou reklamu (66%) a billboardy (51%). (Karel, a další, 2016) Z našeho výzkumu nepřímo vyplývá další důležitý závěr a to, že na děti ve věku 8-11 let mají ještě rodiče relativně velký vliv a budou-li s dítětem o reklamě a jejím obsahu mluvit, mohou významně přispět k jeho výchově v oblasti chápání funkce reklamy a jejího obsahu.

U starších dětí se pořadí vlivů významně mění. Starší děti přiznávají zásadní vliv reklamy – nejvýznamnějším faktorem v jejich rozhodování je značka, následovaná s relativně velkým odstupem názory vrstevníků a sociálními sítěmi. Vliv rodičů u starších dětí významně oslabil, zatímco vliv komerčních faktorů roste. Na starší děti působí primárně značky a vrstevníci, kteří jsou do značné míry též pod stejným komerčním vlivem či dokonce komerční vliv představují (např. Youtubeři, blogeri atd.). Dle Roedder-John, která ve svých studiích zkoumala vliv vrstevníků na děti, je prokázán vliv této skupiny především u jedinců, jejichž rodinné zázemí je nestabilní a komunikace mezi jednotlivými členy je slabá. (Roedder-John, 1999)

Mnozí odborníci se shodují, že rodiče, rodina a socializace dětí hrají zásadní roli v jejich vnímání a chápání reklamy a od toho odvozeného nákupního a spotřebního chování. Roedder konstatuje v (Roedder D., 1999), že „přístup ke vzdělání o reklamě je rozhodující pro prevenci dětí a jejich takzvanou kognitivní obranu proti reklamě. Obecné povědomí a znalost není dostatečnou obranou. Pro děti (minimálně ve věku 9-10 let věku) není dostatečný skeptický nebo kritický přístup k reklamě. Potřebují podstatně detailnější znalost o povaze reklamy a jejím působení“. Rodiče jsou velmi důležitým faktorem pro vzdělávání dětí a jejich socializaci v oblasti nákupního a spotřebního chování. „Rodiče mohou vzdělávat děti o televizní reklamě dvěma smysluplnými způsoby. Jednak mohou rodiče aktivně sledovat reklamu spolu s dětmi. Za druhé rodiče mohou ovlivňovat působení televize a reklamy nastavením pravidel pro sledování televizního vysílání a reklamy.“ (Walsh, 1999)

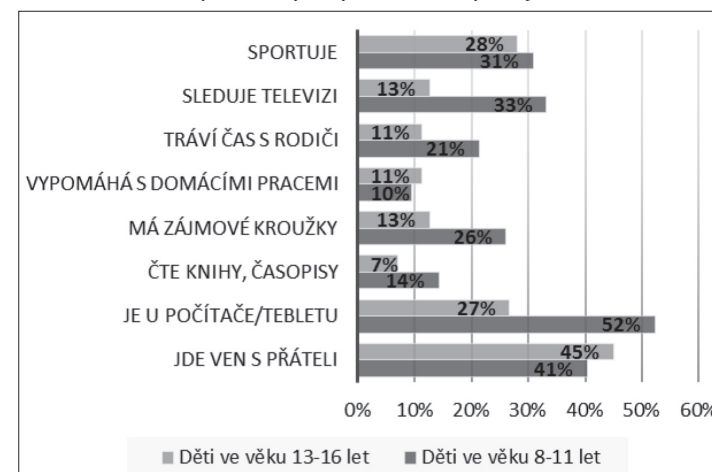
Ve výzkumu jsme se věnovaly i názoru rodičů a jejich zhodnocení, co respektive kdo ovlivňuje nákupní chování jejich dětí. Shodně jako děti i rodiče si uvědomují svůj vliv i vliv blízkého sociálního prostředí (především vrstevníků), tak vliv komerční. Názory rodičů mladších dětí se od názoru dětí liší méně než u dětí starších – uvědomují si svůj vliv a přeceňují vliv vrstevníků. Bohužel některé výzkumy ukazují, že svého vlivu na děti rodiče nedostatečně využívají ke vzdělávání o reklamě a jejím obsahu.

Náš výzkum naznačuje, že vliv rodičů na děti a jejich vzdělávání o reklamě je neefektivnější pokud probíhá před 10-12 rokem věku dítěte. V pozdějším věku dochází k osamostatňování dítěte a vliv rodiče a akceptace jeho názoru dítětem významně klesá. Již zmíněný výzkum z roku 2015 na panelu 707 českých matek ukázal, že jen asi polovina (53%) dotázaných matek sleduje televizní reklamu spolu se svými dětmi. To, jestli rodiče s dítětem sledují televizi je závislé na sociálním statusu rodiny a věku dítěte (70% matek, jejichž nejstaršímu dítěti je 3-6 let, sleduje televizi společně se ním, ve srovnání s 53% z celkového vzorku). Výzkum navíc ukázal, že 20% rodičů nemluví se svými dětmi o reklamě nikdy a 65% procent o ni mluví pouze občas. (Karel, et al., 2016).

Že jsou čeští rodiče ve vztahu k reklamě výrazně pasivní, ukázal i výzkum agentury Millward Brown, kterou provedla pro RRTV (Radu pro rozhlasové a televizní vysílání). Reklamu vnímají jako běžnou až do té míry, že s dětmi o jejím obsahu vůbec nehovoří a nijak jim nevysvětlují účel reklamy ani její smysl. V případě následného nátlaku dětí na koupi výrobku z reklamy už naopak reagují aktivně. Dítě pak zamítnutí koupě výrobku prožívá negativně, neboť nechápe smysl a cíl reklamy a následně důvod rodičovských omezení. (RRTV, 2014). Některé studie ukazují, že děti často ovlivňují svým názorem nákupní rozhodování rodičů a v případě neshody může docházet i ke konfliktům z toho plynoucích. (Norgaard, a další, 2007), (Norgaard, a další, 2011), (Palan, 1997)

Z našeho výzkumu nepřímo vyplývá, že vliv rodičů na děti klesá s narůstajícím věkem dítěte. To lze vyčíst i z odpovědí rodičů. V mladší věkové kategorii je shoda mezi odpověďmi dětí a rodičů v průřezu celého výzkumu podstatně vyšší než u starších dětí. Rodiče starších dětí pak připisují značný vliv sociálním sítím. Rodiče dětí obou věkových kategorií přeceňují vliv internetu a sociálních sítí a podceňují vliv obchodníků formou letáků a POP a POS materiálů v obchodech.

Graf 9 - Jak nejčastěji tráví dítě svůj volný čas?



Zdroj: Plesníková (2016)

Z toho plynoucím závěrem by mohlo být, že interakce mezi rodiči a dětmi v průběhu těchto průměrně 3 let klesá, dochází k jejich osamostatňování a širší socializaci a v důsledku toho významně roste vliv okolí mimo rodinu, tedy i medií a reklamních sdělení. Na to poukazuje i další otázka, kterou se naše studie zabývala, a to jak tráví děti svůj volný čas.

Závěrem z této části našeho výzkumu je, že média a jejich konzumace sehrávají významnou roli v trávení volného mimoškolního času. Jak ukazuje graf 9 čtvrtina starších dětí přiznává, že svůj čas tráví také u počítače nebo tabletu. Možnosti trávit volný čas s rodiči využívá pouhých 11,3 % starších dětí, což je v porovnání s mladšími dětmi o deset procent méně. Alarmující je však skutečnost, že v rámci již výše zmíněné otázky týkající se volného času, přiznalo 52,4 % mladších dotázaných, že nejčastěji jej tráví na počítači či tabletu. Dalších 33,3 % pak ve svém volném čase sleduje televizi. Tato situace se stane ještě závažnější za několik let, jelikož právě tehdy se tyto děti dostanou do období dospívání a pokud mladším dětem takovéto návyky zůstanou, mohou se do budoucna marketéři těšit obrovskému publiku, na něž budou moci zacílit jednoduše skrz internet a televizní vysílání. Okamžitým zvýšení apelu regulátorů, ale i dalších institucí na rodiče, jejichž schopnost ovlivnit myšlení dětí v tomto věku je nejvyšší ze zkoumaných vlivů, je možné docílit podpory komunikace mezi rodičem a dítětem, a tím zajistit dítěti snadnější orientaci ve světě marketingu a spotřeby pro budoucnost.

Závěr

Jak již bylo zmíněno v úvodu, jsou děti z hlediska reklamního působení specifickou cílovou skupinou především díky tomu, že jsou citlivější na podněty emocionální povahy a dokáží obtížněji odlišit fikci od reality. Vnímání reklamy dětmi a vliv reklamy na jejich chování je předmětem mnoha výzkumů. Cílem našeho výzkumu bylo identifikovat, jestli a jaké reklamní vlivy vnímají děti dvou věkových kategorie 8-11 a 13-16 a jejich rodiče a zda jsou odlišnosti s narůstajícím věkem dítěte či mezi názorem dítěte a jeho rodiče. Výsledky výzkumu ukázaly, že obě věkové kategorie dětí vliv reklamy vnímají a uvědomují si, že přichází z různých zdrojů, které jsou schopny identifikovat. To samé si uvědomují i jejich rodiče, ale jejich názory se od vnímání dětí často odlišují. Hlavní závěry především identifikovaly rapidní rozdíl ve vnímání jednotlivých vlivů v rámci obou dětských kategorií. V časové rozmezí přibližně 3 let se mění chování dětí a rozhodování o spotřebě ve prospěch marketingových komunikací. Mladší věková kategorie dětí je pod vlivem reklamy (televize a reklamní letáky) především v domácím prostředí a dá primárně na názor svých rodičů. Rodiče mají vliv a pokud budou s dětmi o reklamě mluvit, mají možnost formovat názor a postoj dětí k reklamě. Starší věková kategorie je primárně ovlivňována komerčními vlivy mimo sféru vlivu rodičů (posun od rodičů ke značce a vrstevníkům) a význam rodičů například při vzdělávání v oblasti reklamy klesá. Nelze však konstatovat, že tato věková kategorie již další osvětu nepotřebuje. Naopak, teenageri patří z pohledu reklamy k nejvíce ovlivnitelnou skupinu.

Za pozornost určitě stojí odlišné vnímání reklamních vlivů z pohledu dětí a jejich rodičů, a to v obou věkových kategoriích. Rodiče mladších dětí (na rozdíl od dětí samotných) obecně podceňují svůj vliv na děti a naopak přisuzují větší sílu vlivu vrstevníků. Rozdíly mezi názorem dětí a jejich rodičů jsou však o dost menší než u starší věkové kategorie. Starší děti sice deklarují spíš negativní vztah k reklamě (58 % ji chápe jako nutnou součást nakupování a 35 % ji dokonce nemá rádo), ale jejímu komerčnímu vlivu jsou na základě vlastních prohlášení vystaveni daleko více, neboť za hlavní zdroj vlivu považují značky (nositele marketingových aktivit firem) a vrstevníky, kteří jsou pod podobným vlivem. Svou roli zde sehrává i množství času stráveného na internetu, který má též často komerční náplň – brouzdání na internetu, sledování videí a chatování s přáteli. Veškerá tato zjištění vedou k závěru, že ve věkové kategorii 13-16 rodiče významně ztrácejí vliv na nákupní rozhodování svých dětí ve prospěch komerčního vlivu a vlivu vrstevníků (často i virtuálních, či dokonce komerčně orientovaných youtuberů).

Významným je z tohoto pohledu i potvrzení trendu, který ukazuje, že děti stále více času tráví v přítomnosti elektronických zařízení a internetu. Za zásadní lze považovat, že 52 % dětí ve věku 8-11 let odpovědělo, že nejčastěji tráví svůj mimoškolní volný čas u tabletu nebo počítače a pouze 21 % že s rodiči. Vezmeme-li v potaz, že v tomto věku jsou děti stále ještě otevřené názoru svých rodičů, zatímco v pozdějším věku již nikoli, je to alarmující skutečnost.

Z výzkumu primárně vyplývá i v kontextu dalších výzkumů provedených v ČR i zahraničí nutnost vzdělávání rodičů především mladších dětí do 10 let o nutnosti komunikovat s dětmi o reklamě, jejím účelu a obsahu. Naše studie též identifikovala oblasti, do kterých by se měl soustředit další výzkum. Jde především o zkoumání komerčních vlivů plynoucích z času tráveného dětmi na internetu, především pak o komerční aspekt počítačových her, product placement ve filmech a hrách sledovaných na internetu a ve věkové kategorii teenagerů o vliv tzv. youtuberů. Bez pozornosti by neměl zůstat ani výzkum vlivu reklamy prostřednictvím reklamních letáků a POS/POP na děti v různých věkových kategoriích.

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VNÍMANIE OBCHODNÝCH FORMÁTOV ZÁKAZNÍKMI NA SLOVENSKU

PERCEPTION OF TYPES OF MARKETS OF CUSTOMERS IN SLOVAKIA

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Abstract

The paper presents the results of a research conducted in June 2016. It examined the perception of Slovak retail stores by customers, from the point of view of their popularity or customer preference. We attempted to find out how much time customers are willing to spend in the individual stores, and which of them they prefer. In the conclusion, we present a table review of respondents' answers to our questions, in which we asked about the specific reasons for preference of shopping in individual stores.

Key words: *Customer, preferences, types of markets, supermarket, hypermarket*

Abstrakt

Príspevok prezentuje výsledky vlastného výskumu, uskutočneného v júni 2016. Bol zameraný na zisťovanie ako vnímajú zákazníci na Slovensku obchodné formáty, teda typy obchodných prevádzok na Slovensku z pohľadu ich obľúbenosti či preferencie zákazníkov. Zaujímalo nás koľko času je zákazník ochotný stráviť v jednotlivých obchodných formátoch a ktoré z nich preferuje. V závere príspevku prezentujeme v tabuľke prehľadne spracované odpovede respondentov, kde sme zisťovali konkrétne dôvody obľúbenosti/preferencií návštevy a nakupovania v jednotlivých obchodných formátoch.

Kľúčové slová: *Zákazník, preferencie, obchodné formáty, supermarket, hypermarket*

JEL Classification: M 31

Úvod

Zákon SR o obchodných reťazcoch (sieťach) 358/2003 Zz. definuje obchodnú sieť ako obchodnú prevádzkareň, alebo zoskupenia obchodných prevádzkarní, ktoré používajú rovnaké alebo vzájomne zameniteľné označenie obchodným názvom, alebo ktoré sú prevádzkované tým istým podnikateľom alebo vzájomne majetkovo alebo personálne prepojenými podnikateľmi. Obchodným formátom rozumieme konkrétny typ obchodnej prevádzky – typ predajne. Klasifikácii obchodných formátov sa venujú viacerí autori. Doteraz však nebolo prijaté ich striktné členenie, takže existujú ich rôzne alternatívy. Niektoré klasifikujú obchodné formáty obsiahnujúce, iné členenia sú užšie. Križan, Bilková, & Kita, (2016) tiež zastávajú názor, možno maloobchodné predajne členiť podľa rôznych kritérií, napríklad podľa druhu ponúkaného tovaru, účelu nákupu, veľkosti a typu predajne, vlastníctva a podobne. V svojej publikácii autori vyberajú členenie podľa Štatistického úradu Slovenskej republiky, ktorý pracuje s definíciami uvedenými v Metodickom liste základného ukazovateľa č. 591. Tu sú definované len pojmy obchodný dom, nákupné stredisko, hypermarket, supermarket, zmiešaná predajňa, potraviny – široký sortiment, nepotraviny – široký sortiment. K inému členeniu sa prikláňa Kita (2013), podľa ktorého rozoznávame predajne v blízkosti bydliska, špecializované predajne, úzko špecializované predajne, predajne s rozličným tovarom, minimarkety, resp. superety, veľkopredajne, resp. supermarket, hypermarkety, diskontné predajne potravín, obchodné domy, špecializované veľkoplošné predajne, obchodné centrá, katalógové výstavné siene, podnikové predajne, category killers.

Obchodný dom je maloobchodná jednotka, tvorená súborom predajných oddelení so spoločným prevádzkovým riešením, ktoré sú sústredené do jedného objektu (Malá & Musová, 2015). Obchodné domy ponúkajú široký a hlboký sortiment tovaru, tovary vyššej cenovej hladiny, širokú ponuku služieb a môžeme ich rozdeliť podľa sortimentu, ktorý ponúkajú na univerzálne (plnosortimentné) a špecializované. Hypermarket je podľa Musovej (2013) veľká predajná jednotka so samoobsluhou, ktorá má jedno poschodie a ponúka zákazníkom 15 až 100 tisíc druhov potravinárskeho a nepotravinárskeho tovaru dennej, častej i občasnej potreby. Okrem toho poskytujú vo svojich priestoroch i služby. Supermarket, resp. veľkopredajňa potravín, maloobchodná jednotka, v ktorej sa ponúka široký sortiment potravinárskeho tovaru doplnený o nepotravinársky tovar častej spotreby. Predajná plocha je v rozmedzí 400 až 2 500 m². Zmiešaná predajňa je predajňa, ktorá ponúka široký sortiment potravinárskeho i nepotravinárskeho tovaru, pričom nie je možné jednoznačne určiť ťažisko sortimentu (Březinová & Vrchota, 2015). Pomer potravinárskeho a nepotravinárskeho sortimentu je zhruba vyrovnaný, čiže podiel potravinového a nepotravinového tovaru neklesá v ročnom priemere pod 40 % obratu. Predajná plocha zmiešanej predajne je spravidla menšia ako 1 000 m² (Križan & Lauko, 2014). Diskontné predajne predstavujú predaj rýchloobrátkového tovaru formou samoobsluhy za nízke ceny a bez náročnejších služieb alebo technického vybavenia. V diskontných predajniach si môže zákazník vybrať z menšieho počtu položiek oproti veľkopredajniam a väčšinou sa predávajú len celé obchodné balenia, napríklad kartón. Na takejto definícii diskontných predajní sa

zhodujú Kita (2013), Spilková (2012). Uvedená autorka rozdeľuje diskontné predajne na diskontné hypermarkety (Kaufland) a diskontné supermarket (Lidl, Penny Market). Meeran et al. (2017) tvrdia, že špecializované predajne sa vyznačujú tým, že ponúkajú zákazníkovi užší a hlbší sortiment, čiže menší počet podskupín, ale väčší počet druhov tovaru. Ponuka tovaru býva doplnená väčším rozsahom služieb a výbornou obsluhou. Väčšinou sa orientujú na užší spotrebiteľský okruh (Adamska & Minárová, 2014). Odborné veľkopredajne zahŕňajú veľké ucelené súbory nepotravinárskeho tovaru, zamerané najmä na druhy s rýchlym obratom. Je v nich samoobsluha, halové riešenie stavby s jedným podlažím, nižšie ceny s diskontnou orientáciou. Predajná plocha sa pohybuje väčšinou medzi 3 000 – 10 000 m². Príkladom sú predajne pre stavebníkov, kutilov – Hobbymarkety, predajne pre záhradkárov, predajne nábytku, veľké predajne elektra či športových potrieb. Samoobslužný sklad Cash and Carry je veľkoplošná predajná jednotka, riešená ako halová stavba a ktorej zákazníci sú väčšinou menší podnikatelia. Sortiment je podobný ako vo veľkom hypermarkete, ťažisko obratu je v potravinách, ktoré sa predávajú vo veľkých baleniach, predajná plocha obvykle 10 000 - 15 000 m². Obchodno-spoločenské centrá ponúkajú okrem nákupu aj možnosť odpocinku v príjemnom prostredí a zábavy, čiže rôzne multikíná, športové zariadenia a pod. Súčasťou jednotky sú parkovacie plochy. Kita & kol. (2015) definuje okrem spomínaných špecializovaných predajní a predajne v blízkosti osídlenia. Špecializovaná predajňa je taká, ktorá ponúka úzky súbor produktov s hlbokým sortimentom v rámci produktového radu. Takéto predajne ponúkajú k vysokokvalitným produktom aj väčší rozsah služieb a výbornú obsluhu. Predajne v blízkosti osídlenia sú podľa autora umiestnené v osídlených útvaroch, na prízemí obytného bloku a ponúkajú len úzky sortiment tovarov dennej spotreby za vyššie ceny. Takéto predajne sú väčšinou otvorené nonstop.

Material a metódy

Pre potreby primárneho výskumu obľúbenosti obchodných formátov na Slovensku sme využili metódu opytovania formou dotazníka. Samotný výskum sme realizovali v júni 2016. Výberový súbor dotazníkového výskumu tvorilo 327 respondentov od 18 rokov. Pri všetkých respondentoch sme predpokladali, že pravidelne nakupujú v rôznych obchodných formátoch. Dotazník sme vytvorili v MS Word 2010. Celkovo obsahoval osemnásť otázok, v príspevku však uvádzame len časť realizovaného celkového výskumu.

Členenie obchodných formátov na Slovensku nie je jednotné, čiže každý autor člení obchodné formáty inak, pre potreby nášho výskumu sme si ich zvolili subjektívne. Vybrali a zadefinovali sme ich nasledovne:

- **hypermarket** – široký sortiment potravinárskeho a nepotravinárskeho tovaru typu Tesco, Kaufland, veľká predajná plocha (2 500 – 20 000 m²), malé pridružené prevádzky (banky)
- **supermarket** – široká ponuka potravinárskeho tovaru, nepotravinársky tovar len doplnkový typu Billa, Jednota;
- **diskont** – predajne s nízkymi cenami typu Lidl;

- **špecializovaná predajňa** – úzky a hlboký sortiment typu Nay, kníhkupectvá a pod.
- **malá špecializovaná predajňa** – malá predajňa s konkrétnym nepotravinárskym sortimentom najmä pultového charakteru typu galantéria, zlatníctvo;
- **malá predajňa potravín** – malá samostatná predajňa s potravinárskym sortimentom, napr. večierka, mäsiarstvo;
- **hobbymarket** – predajňa s konkrétnym sortimentom pre domácich majstrov, záhradkárov typu Mountfield, Hobbimarket;
- **obchodný dom** – široký nehlboký sortiment, viacero samostatných oddelení pod jednou strechou typu Prior;
- **nákupné centrum** – veľké množstvo menších obchodov a veľké potraviny typu Mirage, Europa, Max, Aupark.

Výsledky a diskusia

Ako sme uviedli už v časti materiál a metódy, v našom príspevku prezentujeme len výťažok z celkových výsledkov realizovaného výskumu. Prezentované výsledky sú zamerané na výber formátu z pohľadu zákazníka, dĺžku stráveného času v danom type formátu, ako aj na vybrané dôvody uprednostňovania daného formátu zákazníkom.

Prvá otázka bola zameraná na nákup v jednotlivých typoch predajní – v jednotlivých obchodných formátoch. Respondentov sme sa pýtali, ako často nakupujú v jednotlivých formátoch. Respondenti v tejto otázke mohli označiť len jednu možnosť. Ak daný obchodný formát nenavštevujú, mali možnosť označiť alternatívu, že daný formát nenavštevujú nikdy. Výsledky sme prehľadne spracovali do tabuľky 1. Hrubo sú označené najčastejšie odpovede a tie najmenej časté.

Tabuľka 1 Ako často nakupujete v jednotlivých obchodných formátoch

Nakupujete	Denne	2-3 krát týždenne	Týždenne	2-3 krát mesačne	Mesačne	Niekoľkokrát ročne	Ročne	Nikdy
Hypermarket	25	39	63	102	41	23	5	29
Supermarket	31	68	115	48	36	5	3	21
Diskont	27	89	51	60	36	26	14	24
Špecializovaná predajňa	0	3	21	63	124	49	28	39
Malá špecializovaná predajňa	0	0	8	41	48	147	63	20
Malá predajňa potravín	31	52	71	33	37	58	21	24
Hobbymarket	0	0	2	11	25	83	127	79
Obchodný dom	0	0	12	41	53	139	33	49
Obchodné centrum	0	3	17	54	68	113	29	43

Prameň: Vlastný výskum 2016

Ďalšou otázkou z kategórie, zameranej na návštevnosť jednotlivých formátov, bola otázka, ktorou sme zisťovali, koľko času v označovaných formátoch respondenti strávia. Otázka mala formu tabuľky, v prvom stĺpci boli vymenované obchodné prevádzky a v prvom riadku sme zadefinovali priemerné časy strávené v jednotlivých formátoch. Respondenti si mohli vybrať z viacerých alternatív či strávia v predajniach do 15 minút, do 30 minút, do 1 hodiny, do 3 hodín alebo nad 3 hodiny. V prípade, že vybrané formáty nenavštevujú vôbec, mohli zvoliť alternatívu žiaden, čo vlastne znamená, že tento formát nenavštevujú. Respondenti v tejto otázke mohli označiť len jednu možnosť z uvedených časových kategórií.

Tabuľka 2 Koľko času v priemere strávite v jednotlivých typoch predajní

Koľko času	Do 15 minút	Do 30 minút	Do 1 hodiny	Do 3 hodín	Nad 3 hodiny	Žiaden
Hypermarket	38	103	138	23	3	22
Supermarket	98	133	67	11	1	17
Diskont	96	159	48	0	0	24
Špecializovaná predajňa	65	132	86	28	0	16
Malá špecializovaná predajňa	190	75	37	8	0	17
Malá predajňa potravín	232	58	13	0	0	24
Hobbymarket	28	87	135	12	3	62
Obchodný dom	23	65	137	51	7	44
Obchodné centrum	4	19	102	131	34	37

Prameň: Vlastný výskum 2016

Odpovede tu boli veľmi individuálne. Respondenti nenakupujú rovnako dlho vo všetkých typoch predajní a ako vyplýva z ich odpovedí trávajú najkratší čas v malých špecializovaných predajniach a malej predajni potravín. V týchto predajniach sa zdržia zákazníci priemerne len do 26 minút. Takto odpovedalo pri malej predajni potravín takmer 77 % a pri malej špecializovanej predajni viac ako 61 % opýtaných, ktorí navštevujú tieto typy predajní. V supermarkete (133), diskonte (159) a v špecializovanej predajni (132) sa zdrží najviac respondentov do 30 minút. Viacerí respondenti hovorili, že najmä do supermarketu a diskontu chodia niekedy len tak „na rýchlo“ niečo zobrať a zdržia sa tam ešte oveľa kratšie. Čas v týchto typoch prevádzok skracuje aj viacero pokladní, ktoré v týchto typoch predajní bývajú. V hypermarkete (138), hobbymarkete (135) a obchodnom dome (137) strávi najviac respondentov z opýtaných priemerne do 1 hodiny. Tieto typy prevádzok sú už aj rozlohou väčšie, čiže ak chcú zákazníci pohodlne nájsť všetok hľadaný tovar, hodinu majú ako sa vyjadrili tak „akurát“. Tiež možno skonštatovať, že vzhľadom na sortimentnú štruktúru, chodia zákazníci do týchto typov predajní väčšinou na väčšie rodinné nákupy 2-3 krát mesačne, čo samozrejme predlžuje čas nákupu, kým nájdú všetko, čo potrebujú. Posledným typom predajne - obchodným formátom je nákupné centrum. V tomto prípade označilo najviac respondentov, že sa v jeho priestoroch väčšinou zdrží až do 3 hodín. Výsledok sme pri nákupnom centre očakávali, keďže v nákupných centrách je veľa rôznych obchodov,

služieb a respondenti sem často chodia s celou rodinou na prechádzku, do kina, kaviarne a podobne. Teda nielen nakupovať, ale i relaxovať a stráviť príjemne či zmysluplne svoj voľný čas. Výsledky tejto otázky sme prehľadne spracovali do tabuľky 2. Hrubo sú označené najčastejšie odpovede a tie najmenej časté.

Tabuľka 3 prezentuje výsledky odpovedí k ďalšej otázke, v ktorej sme zákazníkov požiadali vyjadriť svoje názory na to, ktoré tri typy obchodných formátov majú najradšej, ktoré sú ich najobľúbenejšie, najpreferovanejšie. Táto otázka bola uzavretá. Zákazníci mali zakrúžkovať len tri typy obchodných formátov. Dominanciu preferencií v obchodných formátoch z pohľadu zákazníka získali hypermarkety, obchodné centrá a špecializované predajne (hrubo označené).

Tabuľka 3 Ktoré tri typy obchodných formátov navštevujete najradšej?

Typ prevádzky	Počet odpovedí
Hypermarket	196
Supermarket	125
Diskont	123
Špecializovaná predajňa	154
Malá špecializovaná predajňa	91
Malá predajňa potravín	46
Hobbymarket	53
Obchodný dom	28
Obchodné centrum	165

Prameň: Vlastný výskum 2016

Tabuľka 4 poskytuje prehľad vyjadrení zákazníkov na otázku, aké sú dôvody obľúbenosti/preferencie obchodných formátov. Zákazníci mali v otvorenej otázke vyjadriť svoj názor, prečo najradšej navštevujú tie obchodné formáty, ktoré vybrali za najobľúbenejšie.

Tabuľka 4 Vybrané dôvody obľúbenosti obchodných formátov

Typ prevádzky	Dôvod obľúbenosti obchodného formátu
Hypermarket	veľký výber rôzneho tovaru (najmä potravinového), výhodné ceny, kvalita, rodinné balenia, dostatok parkovacích miest, dlhšie otváracie hodiny, zľavy a akcie (napr. víkendové akcie, letákové zľavy), dodatkové služby (pošta, banka, bankomat, lekáreň, kaviareň), WC, dostatok pokladní, výhodná poloha, vernostné karty, dostupnosť MHD, prívätne značky, viaceré možnosti platby, prehľadnosť predajne, široké uličky, sila zvyku, personál nie je prehnane ochotný
Nákupné centrum	veľký výber produktov, veľa obchodíkov (rôzne značky), všetko pod jednou strechou, doplnkové služby (reštaurácie, kino, kaviarne, ...), kvalitný tovar, príjemné prostredie, veľké parkoviská (aj keď často preplnené), vhodné na nákupy s celou rodinou, výpredaje, príjemný personál, dobré umiestnenie

Špecializovaná predajňa	odbornosť personálu, príjemné vystupovanie, empatia, poradenstvo, kvalita produktov, dobrý výber (hlboký sortiment), špecifický tovar, parkovanie, možnosť platby na splátky (niekedy aj bezúročné), usporiadanie predajne a atmosféra, vyjednávanie zliav
Supermarket	dostatočný sortiment potravín za prijateľné ceny a v dobrej kvalite, umiestnenie predajne blízko bydliska (aj na dedinách), domáce produkty aj bio produkty, dostatok osobného priestoru pri nakupovaní, dobrá orientácia v predajni, rýchlosť vybavenia nákupu
Diskont	nízke ceny a napriek tomu vysoká kvalita produktov, umiestnenie predajne, veľký výber najmä potravín, parkovisko, čerstvé mliečne výrobky, ovocie a zelenina, zaujímavá letáková ponuka každý týždeň, zahraničné produkty, dobré skúsenosti
Malá špecializovaná predajňa	odbornosť a ochota personálu, poradenstvo, osobný kontakt, kvalita tovaru, umiestnenie predajne, rýchle vybavenie nákupu, špecializované produkty, atmosféra v predajni
Hobbymarket	odborný a milý personál, výhodné ceny, príjemná atmosféra, priestrannosť predajne, odvoz väčšieho tovaru zdarma, parkovanie, zaujímavý tovar
Malá predajňa potravín	umiestnenie predajne ("vždy po ruke"), lacné kvalitné slovenské potraviny, milý personál, príjemný vzhľad predajne, komorná atmosféra, čerstvé produkty, málo ľudí, rýchle vybavenie nákupu
Obchodný dom	umiestnenie predajne, ústretový a odborný personál, kvalita tovaru, viac obchodov pod jednou strechou (obľúbené značky), atmosféra predajne, rýchlosť vybavenia, veľa druhov hlavne nepotravinového tovaru

Prameň: Vlastný výskum 2016

Pri obchodnom formáte hypermarket nás zaujala odpoveď sila zvyku, prípadne personál nie je prehnane ochotný. Túto odpoveď uviedlo dokonca niekoľko respondentov. Samozrejme, najviac respondentov pri hypermarkete odpovedalo, že je tam veľký výber, prijateľné ceny, kvalitný tovar a dlhšia otváracia doba. Pri nákupnom centre respondenti uvádzali najmä, že tam nájdú všetko pod jednou strechou. Ako výhodu uvádzali parkoviská, hoci väčšina podotkla, že bývajú preplnené. Čo sa týka špecializovanej predajne, dve tretiny respondentov uviedli ako hlavný dôvod odbornosť personálu, ktorý vie dobre poradiť a taktiež kvalitu produktov. Hlavným plusom supermarketov je lokalita predajni, dostatočný sortiment potravín v dobrej kvalite a domáce výrobky. Diskont všetci obľubujú z dôvodu výhodnej ceny výrobkov v dobrej kvalite. Pri malej špecializovanej predajni sa viacerým respondentom páči atmosféra v predajni a pri hobbymarkete zaujímavý tovar a možnosť väčšie výrobky bezplatne odviezť domov. Malá predajňa potravín sa umiestnila na predposlednom mieste, hoci si respondenti pochvaľujú kvalitné slovenské potraviny a najmä rýchle vybavenie nákupu. Na poslednej priečke obľúbenosti sa v našom výskume umiestnil obchodný dom. V tomto prípade zákazníci uvádzajú ako pozitívum najmä kvalitu tovaru a skutočnosť, že nájdú všetko pod jednou strechou.

Záver

V príspevku prezentované výsledky vlastného výskumu korešpondujú s trendmi na trhu. V obľúbenosti jednotlivých obchodných formátov medzi zákazníkmi dominujú obchodné centrá ako poskytovatelia širokej palety produktov v jednotlivých samostatných obchodoch/značkách spolu so spektrom služieb k relaxácii či zmysluplného prežitia voľného času. Na druhej priečke sa umiestnili hypermarkety, hoci formáty veľkých predajných priestorov vykazujú postupný pokles na trhu. Nárast špecializovaných predajní súvisí so zdravým životným štýlom, ako aj orientáciou na vysokokvalitný tovar, nielen v potravinách.

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INFLUENCE OF TEACHING METHODS ON THE SELF-LEADERSHIP EXPRESSION OF THE MILLENNIUM GENERATION STUDENTS

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Abstract

Both business and science unanimously agree that nowadays self-leadership is an exceptional factor of competitiveness in the labour market. Higher education institutions generate future leaders therefore this article aims at revealing teaching methods influencing the expression of self-leadership of students. The article presents theoretical aspects of expression of self-leadership, examines the concept of learning and theoretical aspects of teaching methods, analyses the impact of teaching methods on the expression of self-leadership from the students' and teacher's point of view, presents recommendations for improvement of teaching methods developing the self-leadership of students.

Key words: *teaching methods, self-leadership*

JEL Classification: C91, I21, J24

Introduction

Globalization and the development of innovative technology have made a significant impact on the competitive environment, therefore leaders who can properly deal with the arisen challenges are required. Some theories provide that leaders are born (*Great Man Theory*), others state that each individual has the opportunity to evaluate his/her leadership potential (*Trait Theory*), the third ones claim that leaders are grown (*Behavioural Theories*), another ones emphasize that the leader's behaviour depends on the situation (*Situational Leadership*), focus on the forecast of the most appropriate or efficient style of leadership in particular circumstances (*Contingency Leadership*), stress the relationship between the leader and his followers (*Transactional Theory*), distinguish the role of leadership in changing conditions implementing the transformation of activities of the organization (*Transformational Theory*). Today self-leadership is emphasized more and more often. Although some studies have been

conducted in Europe analysing the expression of leadership in schools, however, little attention is paid to the expression of self-leadership of students. Self-leadership is undoubtedly important especially in pursuance of the career. Since highly skilled professionals are trained in higher education institutions, it is important to find out how the expression of self-leadership of students is influenced by teaching methods applied in those institutions.

Problem raised in the article – how teaching methods affect the expression of self-leadership?

Object of the article – the expression of self-leadership of students (the Millennial generation) in two higher education institutions A and B in Lithuania.

Aim of the article – to analyse the impact of different teaching methods on the expression of self-leadership.

Tasks of the article:

1. To examine the impact of teaching methods on the expression of self-leadership from students' point of view;
2. To analyse the impact of teaching methods on the expression of self-leadership from teachers' point of view;
3. To present recommendations for improvement of teaching methods developing the self-leadership of students.

Theoretical background

Leadership is one of the most discussed topics in the social sciences (Bass, 1991; Avolio, Sosik, Jung, Berson, 2003; Bennis, 2007). The studies of leadership started with the search of differences among leaders and the pursuit to explain the concept of a leader (Galton, Eysenck, 1869). The subsequent studies intend to demonstrate how individual characteristics, skills, personal properties affect the efficiency of a leader (e.g., Eagly, Karau, Makhijani, 1995; Judge, Bono, Ilies, Gerhardt, 2002; Judge, Colbert, Ilies, 2004; Mumford, Campion, Morgeson, 2007). The summary of scientific research leads to the following conclusions: first, leadership is a universal multilevel phenomenon (in all cultures and in all times); second, the theory and practice of leadership covers many levels, therefore a detailed analysis is necessary; third, our perception of leaders and leadership is infinite, i. e. a continuous scientific quest characterised by theories and empirical studies on leaders of the new generation (Day, Antonakis, 2012).

Today special attention is paid to self-leadership, the significance of which has undoubtedly increased in the recent years. Self-leadership is perceived as a process, during which the influence is made on oneself in order to achieve own goals (Bryant, Kazan, 2012). The concept of self-leadership evolved from the theory of self-management and is associated with the impact on oneself (Manz, 1983, 1986, 1992; Manz, Neck, 2004; Manz, Sims, 1990, 2001). Self-leadership is a broader concept of self-efficacy, which involves strategies of behavioural self-regulation, self-control and self-management, and additionally defines some cognitive strategies arisen from theories of intrinsic motivation (Deci and Ryan, 1985), social cognitive theory (Bandura, 1977,

1991, 1997) and psychology of positive cognition (Beck et al., 1979; Burns, 1980; Seligman, 1991). According to Stewart et al. (1996), the mastery of self-leadership may determine successful or unsuccessful activity of an employee and become a critical factor reducing staff resistance to changes in an unstable environment of the organization.

Self-leadership helps to explain how people think and how they behave following cognitive, motivational and behavioural theories (Kraft, 1998; Prussia et al., 1998; Yun et al., 2006). Strategies of self-leadership are divided into three categories (Manz, Neck, 2004; Manz, Sims, 2001; Houghton et al., 2003): behaviour-focused strategies, natural reward strategies, and constructive thought pattern strategies. The concept of learning and theoretical aspects of teaching methods must be considered to properly evaluate teaching methods impact to self-leadership development.

P. F. Drucker (1993) defines the knowledge society as the society of learning individuals and organizations generating and exploiting knowledge. The concept of knowledge society describes the value of education (the better world, democracy, etc.) and the purpose of learning, i. e. the improving and renewing entirety of abilities and skills of each member of the society (to contemplate, to investigate one's practices, to predict and project the future, to cooperate).

The scientific research of the twentieth century allows to distinguish three concepts of learning: *behaviouristic*, *cognitive* and *humanistic*. Based on theoretical grounds, these concepts of learning differently treat the research object and differently interpret the human nature.

- Behaviourists treat learning (or mastering) as a change in the individual's behaviour, which can be enhanced by awards and penalties. According to P. Sahlbergo (2005), behaviourists claim that it is impossible to study the process of thinking and information processing of a learner as these processes cannot be observed directly. Behaviourists would rather speak of good teaching, just like V. Rajeckas (1999), instead of good learning. Behaviouristic methods are useful and more often focused on the transfer of information – knowledge; they include such methods as lecture, experiment.
- A more recent, cognitive, concept of learning evolved from problems unsolved by behaviourists. It is based on the model of information processing employed in cognitive psychology and perceives the individual as an active person seeking his goals, receiving, processing and generating information. Hence, it can be stated that learning involves a number of experiences, which are not always visible. P. Sahlbergo (2005, p. 29) believes that cognitivists emphasize the fact that learning begins when the learner observes his lack of knowledge. This school also basically follows the humanistic conception of a human and sees the learner as a curious individual, who seeks knowledge and has an aim. Cognitive methods include reflection, the share of experience and similar methods, which help a man to learn to control his decisions by observing himself and his way of thinking.
- The concept of humanistic learning is based on the key statements of humanistic pedagogy and psychology, and focuses on the disclosure of natural abilities of an individual and the development of an honest, free, responsible personality. The underlying principle involves the acknowledgement of and respect to the value

of each person, the personal freedom of choice and responsibility. According to R. Grigaitienė (2004, p. 10), the primary purpose of humanistic school is not only to provide knowledge but also to educate a person able to recognize another individual. The higher education institution primarily has to help everyone to understand oneself, to perceive one's own identity, to find the purpose in life. Hence, education must be focused on a man, it must help him to express himself and become a better person. Humanistic methods are distinguished by the fact that the process is based on the cooperation between the teacher and the student. They are creating study objectives together, the student has more responsibility for his results, while the teacher is focused on the student. Humanistic methods include discussion, various projects, etc.

Based on historically formed educational trends, three groups of teaching methods are distinguished:

1. informative (explanatory-illustrative-reproductive) – it is a system of didactic actions and ways providing learners with and solidifying basic knowledge in science, technology, manufacture, art and other subjects;
2. practical-operational. It involves activities organized by the teacher employing the acquired knowledge. These techniques teach methods of operation, and their effectiveness depends on the proper selection of exercises, the formation of their system and the preparation of activity instructions;
3. creative. The essence of these methods is to discover the new. Everything that the learner independently discovers and accomplishes is considered to be the new.

Productive learning requires various environmental factors such as the effective organization of educational process, the variety of teaching and learning methods. A. M. Juozaitis (2005, p. 163) indicates that learners' attention can be maintained by the diversity of occupation, which can be achieved by changing work styles, applying a variety of learning methods.

The relevance of teaching methods and their role was emphasized by both foreign (e. g., N. L. Gage, D. C. Berliner (1994), E. Jensenas (1999), P. Ramsdenas (2000) et al.) and Lithuanian scholars (J. Laužikas (1974), S. Šalkauskis (1992), V. Šernas (1995), L. Jovaiša (1997), V. Rajeckas (1999) et al.). Teaching methods in the study process constitute a system of students' activity intended to take over the scientific knowledge, to acquire theoretical and practical skills, to develop abilities, to shape the world-view. Teaching methods are included in study programs of each subject. Methods can help not only to convey the information but also to develop certain competences or skills depending on the objectives to be achieved during the study process.

Methodology of the research

Methodology of the research is grounded on the following theoretical assumptions:

- self-leadership is a process during which people influence themselves in order to guide and motivate themselves to a certain activity (Houghton et al., 2003, p. 126), assuming that the concept of self-leadership is rooted in a number of interrelated theories of self-efficacy, i. e. self-regulation (Kanfer, 1970; Carver, Scheier, 1981), self-control (Cautela, 1969; Mahoney and Arnkoff, 1978, 1979; Thoresen and Mahoney, 1974), self-management (Andrasik and Heimberg, 1982; Luthans and Davis, 1979; Manz and Sims, 1980);
- the construction approach emphasizes that learning is an active and constructive process (Novak, 1998);
- learning is perceived as a social process, during which the learner constructs meaning (Arends, 1998), or when learning is treated as a natural and growing process, which is supposed to become a pleasant, motivating activity ongoing throughout the human life (Longworth, 2000).

The research was conducted in January-February, in the year 2017. Three main methods were used to conduct the research:

1. *Written questionnaire survey.* In order to analyse the impact of teaching methods on the expression of self-leadership from students' point of view, students (the Millennial generation) of higher education institutions A and B were surveyed. Survey sample: questionnaires were completed by 57 students (the Millennial generation) of higher education institution A (50 in Lithuanian, 7 in English) and 58 students (the Millennial generation) of higher education institution B (58 questionnaires in Lithuanian). Most students enrolled in colleges and universities are members of the Millennial generation (Elam, Stratton, Gibson, 2007). Demographers Straus and Howe define Millennials as born between 1982-2004 (Howe, Strauss, 2009; Horovitz, 2012). The Millennial generation of college students has demographics and attitudes toward diversity issues different from their predecessors (Broido, 2004). The research involved 80,4% of women and 19,6% of men. The distribution of respondents by age: the largest share of respondents involved students between 18-20 years old (50%), between 21-25 years old - 37%, between 26-30 - 10 %, and only 3% of respondents over 30 years old. The research involved respondents holding different positions in the organizational structure: employers / business owners comprised 1% of all respondents, the top and mid-level executives - 1%, professionals and the staff - 3%, workers and technicians - 9,58 %, and unemployed - 71,28%.
2. *Semi-structured interviews* with teachers teaching students of different study programs in higher education institutions A and B. The informants were selected taking into account their period of service in higher education institutions A and B, their positions held, the specificities of work, in order to obtain as much

information as possible on the research subject. The research involved 8 teachers: 3 from higher education institution A and 5 from higher education institution B. Interviews were conducted in higher education institutions A and B. The average length of interview was from 15 min. to 40 min. The informants participated in the research voluntarily. They were informed about the nature of the research and the compliance with the principles of research ethics. They gave an oral consent to participate in the interview. The respondents were informed about the ensured confidentiality and anonymity of the information provider.

3. *Analysis of documents of higher education institutions A and B* (subject descriptions of study programs).

The following research instruments were employed:

Written questionnaire survey. To assess the self-leadership, Neck and Houghton's (2002) revised self-leadership questionnaire (RSLQ) was employed. The questionnaire consisted of 3 individual blocks covering 45 questions. The initial 8 questions were social-demographical intending to find out the respondents' age, sex, higher education institution, form of study, year of study, group size and the respondents' position in the organization system; the subsequent 35 questions reflected the three main strategies of self-leadership, i. e. behaviour-focused, natural reward and constructive thought dimensions. The behaviour-focused dimension was reflected by a set of questions covering self-goal setting, self-rewarding, self-punishment, self-observation and self-cueing. The natural reward dimension consisted of a set of questions focusing on natural endowment. The constructive thought dimension consisted of a set of questions on successful visualization, talking to oneself, assessment of beliefs and attitudes. The final two questions were designated to assess the impact of teaching methods on self-leadership.

To determine the reliability of the research, Cronbach's alpha coefficient was calculated. According to George, Mallery, Kronbach alpha coefficient strength is (Gliem R., Gliem J., 2003): > 0,9 – perfect, > 0,8 – strong, > 0,7 – acceptable, > 0,6 – questionable, > 0,5 – low, < 0,5 – unacceptable. In the present research, the total strength of Cronbach's alpha coefficient for self-leadership was 0,924, which demonstrated that the reliability of data was strong and almost reached the ideal.

During the research, the data were obtained by SPSS program.

Semi-structured interviews with teachers teaching students of different study programs in higher education institutions A and B were conducted according to the questionnaire developed by the researchers. The questionnaire consisted of 9 questions: teachers were asked to describe a student with self-leadership qualities; to assess self-leadership qualities of students from study programs falling within the fields of social sciences and technologies; to distinguish the most important factors for a student to develop self-leadership in the study process and to discuss teaching methods applied to develop the self-leadership of students.

Results and Debate

The impact of teaching methods on the expression of self-leadership from the students' point of view. The research results reflecting the extent to which the strategies of self-leadership (behaviour-focused, natural reward and constructive thought) are mastered, demonstrate that, according to respondents, the strategy dimensions of self-leadership are not fully mastered in both higher education institutions. The average of mastering the behaviour-focused strategy comprises 2,27 points in higher education school A and 2,14 points in higher education school B out of five possible, although it is not a high rate. This dimension has a significant importance to self-leadership as it consists of more than a half of components indicating the strength of self-leadership. The self-goal setting is associated with the purposefulness, the adequate solution of problems as it is much easier to act with clear objectives (the average of 2,11 points in higher education institution A and 2,14 points in higher education institution B). Self-observation (the average of 2,29 points in higher education institution A and 2,08 points in higher education institution B) indicates that thoughts, intentions, wishes, the inner-self are analysed, and this process helps to know oneself better. The skills of self-rewarding (the average of 2,48 points in higher education institution A and 2,37 points in higher education institution B) emphasize that, after having fulfilled the task well, respondents reward themselves with something pleasurable and enjoyable for them such as a good movie, a delicious lunch, etc. It is a kind of gratitude to oneself and an incentive to proceed. The average of self-cueing dimension (the average of 2,23 points in higher education institution A and 1,91 points in higher education institution B) is not very high, which means that written notes supposed to remind what to perform in order to focus on relevant subjects, are not considered to be highly important. Self-punishment occupies the lowest position in the group of behaviour-focused skills (the average of 2,30 points in higher education institution A and 2,11 points in higher education institution B). It may be assumed that respondents are less likely to admit their mistakes, to openly express their dissatisfaction with themselves after fulfilling the task, which is highly important when taking other tasks and correcting one's own mistakes.

The average of mastering natural reward strategy is similar to the behaviour-focused strategy (the average of 2, 28 points in higher education institution A and 2,17 points in higher education institution B), and it reveals that when fulfilling tasks, it is not very important for respondents to focus on pleasurable aspects of the task, to search for something enjoyable in one's activities and, in case of the possibility of choice, to choose more pleasurable ways to perform certain actions.

The average of mastering constructive thought strategy is the lowest (the average of 2,19 points in higher education institution A and 2,03 points in higher education institution B) out of all three dimensions. The dimension of successful visualization while performing the work is the highest in higher education institution A (2, 23 points). Hence, respondents understand that in order to successfully perform the activity, it is useful to imagine the task beforehand and to perform it in one's mind. The dimension of talking to oneself was the lowest in higher education institution B

(the average of 1, 91 points). According to respondents, such skills are the least appreciated, although sometimes talking to oneself aloud or mentally may help to solve a complex question or issue.

All three strategies of self-leadership are more strongly expressed in higher education institution A. The additional ANOVA analysis revealed that averages between higher education institutions do not significantly differ (see Table 1).

Table 1. Summary of ANOVA process on mastering the strategies of self-leadership by higher education institutions

Criteria	Average			SN	Group	Average			SN	Group
Assessment of beliefs and attitudes	2.14	±	0.68		a	2.13	±	0.75		a
Talking to oneself	2.18	±	1.01		a	1.91	±	0.99		a
Focus on natural endowment	2.28	±	0.73		a	2.17	±	0.64		a
Self-cueing	2.23	±	1.22		a	1.91	±	0.91		a
Self-rewarding	2.48	±	1.06		a	2.37	±	1.16		a
Self-punishment	2.30	±	0.86		a	2.11	±	0.88		a
Self-observation	2.29	±	0.77		a	2.08	±	0.65		a
Self-goal setting	2.11	±	0.85		a	2.14	±	0.64		a
Successful visualization while performing works	2.23	±	0.77		a	2.03	±	0.68		a

Source: composed by the authors according to the data obtained during the research

The analogous analysis was conducted distinguishing average points by study programs falling within the fields of social sciences and technologies. The average of behaviour-focused strategy comprised 2,02 points in study programs falling within the field of social sciences and 2,23 points in study programs attributable to the field of technologies out of five possible, although it is not a high rate. The average of mastering natural reward strategy comprised 2, 13 points in study programs falling within the field of social sciences and 2, 23 points in study programs attributable to the field of technologies, which revealed that it was not very important for respondents to focus on pleasurable aspects of the task, to search for something enjoyable in one's activities and, in case of the possibility of choice, to choose more pleasurable ways to perform certain actions.

The top rated self-rewarding skills (2,35 points in study programs falling within the field of social sciences and 2,52 points in study programs attributable to the field of technologies) stress that self-rewarding is one of the most expressed instruments of self-motivation. The lowest average of 1, 88 points was attributed to the skills of self-cueing in the study programs falling within the field of social sciences.

To sum up, it can be stated that there are more differences in averages between fields of sciences rather than between higher education institutions. All three strategies of self-leadership are more strongly expressed in study programs attributable to the field of technologies.

Table 2 reveals that averages significantly differ between fields of sciences taking into account relevant leadership dimensions / features: self-cueing, self-observation and successful visualization while performing works. These dimensions of self-leadership are more strongly expressed in study programs attributable to the field of technologies.

Table 2. Summary of ANOVA process on mastering the strategies of self-leadership by study programs falling within the fields of social sciences and technologies

Criteria	Average			SN	Group	Average			SN	Group
Assessment of beliefs and attitudes	2.12	±	0.72		a	2.15	±	0.72		a
Talking to oneself	1.90	±	1.03		a	2.23	±	0.96		a
Focus on natural endowment	2.13	±	0.69		a	2.34	±	0.68		a
Self-cueing	1.88	±	0.95		a	2.32	±	1.19		b
Self-rewarding	2.35	±	1.12		a	2.52	±	1.09		a
Self-punishment	2.07	±	0.79		a	2.38	±	0.95		a
Self-observation	2.06	±	0.66		a	2.35	±	0.77		b
Self-goal setting	2.08	±	0.67		a	2.19	±	0.84		a
Successful visualization while performing works	2.01	±	0.65		a	2.28	±	0.80		b

Source: composed by the authors according to the data obtained during the research

The correlation analysis clearly reveals that leadership dimensions / qualities are related, i. e. with some features developing, others are also automatically developing, or vice versa. A strong correlation exists between the focus on natural endowment and the assessment of beliefs and attitudes. The correlation analysis of leadership qualities demonstrates the importance of development of a leader as a versatile personality. The relation is highlighted in the correlation analysis of leadership qualities in 3 levels (table 3). A very strong relation exists between constructive thought and behaviour-focused strategies of self-leadership, relations among other strategies are also rather strong.

Table 3. Correlation analysis of leadership qualities (3 levels)

	Constructive thought	Natural reward	Behaviour-focused
Constructive thought	1.000	.649**	.776**
Natural reward	.649**	1.000	.652**
Behaviour-focused	.776**	.652**	1.000

Source: composed by the authors according to the data obtained during the research

Students of study programs falling within the fields of social sciences indicate operational methods as the most important for the development of self-leadership ($p = 0.031$), while students of study programs attributable to the field of technologies consider informative methods to be the most important for the development of self-leadership ($p=0.019$). Creative methods are equally important to both fields of science ($p = 0.460$). The research reveals that informative methods are more frequently applied by students of study programs attributable to the field of technologies ($p=0.000$), while the application of operational and creative methods does not statistically differ ($p=0.203$ and $p=0.934$). In both higher education institutions, creative methods were distinguished as the most important teaching methods for the development of self-leadership, however, their application was the lowest in higher education institution A. In higher education institution B, informative methods were the most rarely used. It was also confirmed by additionally conducted ANOVA analysis ($p = 0.024$). The assessment of application of teaching methods for the development of self-leadership revealed that the average of informative methods also clearly differed statistically ($p=0.000$).

Summarising the impact of teaching methods on the expression of self-leadership from the students' point of view, it can be concluded that the expression of self-leadership slightly differs between higher education institutions, a more obvious difference is observed between study programs falling within the fields of social sciences and technologies. The significance of teaching methods for the development of self-leadership differs between fields of science: there is a statistically significant difference between operational and informative methods ($p=0.031$ and $p=0.019$). By the higher education institution, there is a difference only between the significance of operational methods ($p=0.024$). The importance and application of informative methods differ both by the field of science and by the higher education institution ($p=0.000$).

The impact of teaching methods on the expression of self-leadership from the teachers' point of view. Primarily, during the interviews, teachers of higher education institutions A and B were asked to describe a student with self-leadership qualities. Teachers pointed out that such a student is active, enterprising, inquisitive, self-confident, able to organize the group work, purposeful, disciplined, sociable and adventurous.

The interviews aimed at clarifying whether self-leadership qualities differed between students from study programs falling within the fields of social sciences and

technologies. Most of the teachers argued that there were no substantial differences (A2: "I don't think so. Self-leadership properties are universal, I don't think they depend on the context in which they occur"; A3: "I believe that there is a difference only between type of activities (areas), where a person works, however, self-leadership qualities are basically similar"; B3: "I noticed no differences because I believe that fields of science have no effect on self-leadership, it is only a space for operation"; B5: "There are no differences, personally, I have not noticed any").

The interviews revealed that self-leadership had a positive impact on learning outcomes or was partially related to better learning outcomes. As shown in Table 4, student's personal goals, purpose, self-motivation, practice of group work and teacher's personality constitute the most important aspects for the student to develop self-leadership.

Table 4. Relation between self-leadership and learning outcomes

Category	Subcategory	Supporting statements
Relation between self-leadership and learning outcomes	Learning outcomes are adversely affected by a diversity of activities (negative impact)	A1: "Most commonly, leaders are active in social activities of students' organizations, therefore for most of them learning outcomes are adversely affected. Very few of them are good learners and progressive students".
	Self-leadership has a positive impact on learning outcomes	A2: "In general, there should be a positive correlation between leadership and better learning outcomes ..." A3: "The impact is considerable as the developed self-leadership makes it faster to achieve study outcomes". B4: "A student with self-leadership qualities is a decent student, whom usually it is a pleasure to work with, who is curious, communicative, most commonly his learning outcomes are better". B5: "Learning outcomes largely depend on self-leadership as a person, who cannot control oneself, has no aims or a plan how to achieve them, and makes no effort to achieve them, cannot and does not achieve good learning outcomes".
	Self-leadership is partially related with learning outcomes	B1: "I only partially relate self-leadership with learning outcomes as a student with excellent learning outcomes is not always a leader. However, I have not met any leader whose learning outcomes were negative..." B2: "In social sciences, it has more to do with study results of subjects..." B3: "...a student with self-leadership qualities will put more effort to achieve good learning outcomes as they will be a certain goal or aspiration for him/her..."
	There is no direct relation between self-leadership and learning outcomes	B3: "I see no direct relation. Learning outcomes are not formulated by the student. If they were formulated by the student himself/herself, certain connections could be discerned.

Source: composed by the authors according to the data obtained during the research

Where necessary, however, not very enjoyable tasks are performed (behaviour-focused strategy), usually applied teaching methods include case analysis and discussion (A3: "... discussion, case analysis..."; B1: "Case analysis, discussion, theoretical questions..."; B5: "...situation analysis..."), project work (A1: "... defence of projects..."). In this case, teachers attempt to provide students with basic knowledge required to perform the task (A2: "I try not to give "unenjoyable" tasks. When I give complicated tasks, I make sure that students had basic knowledge"; B3: "I choose teaching methods according to the task purpose, rather than according to the degree of enjoyment or unenjoyment of the task. [...] If the task is unenjoyable, it requires more explanation and justification"), to present the task as amusingly as possible (B4: "I attempt to turn all "unpleasant" tasks into "pleasant" ones presenting various examples thus engaging students in the relevant subject"; A2: "I believe that interesting tasks naturally motivate with their relevance and importance") or to motive to engage into it (A2: "I motivate with evaluation, career opportunities...").

In order to reveal the aspects of an enjoyable task and to motive students to perform it (natural reward strategy), usually creative teaching methods are applied (A1: "Problem-based tasks, workshops..."; B1: "A mind map, brainstorming, group work, practical (playful) tasks"; B3: "Active teaching methods..."; B4: "Playing techniques, the use of video, creative tasks, problem-based tasks..."; B5: "Lecture - excursion, lecture - event organized by students themselves").

Such teaching methods as discussion, case analysis, problem-based tasks, creative tasks mostly help to shape students' thinking models, which have a positive impact on the intended activity (constructive thought strategy) (A1: *Discussions, projects, written and laboratory works, solving challenges ...*"; A2: *Discussion as a method develops all aspects of constructive thinking: the ability to present and justify arguments, as well as to assess presented arguments, to seek for counter-arguments*"; B2: *"Debate, discussion..."*; A3: *"...debate, case analysis..."*; B1: *"Case analysis, practical - creative tasks..."*; B4: *"Playing techniques, the use of video, creative tasks..."*).

Teaching methods applied by teachers depend on the specifics of the taught subject (B2: *"It's the specifics of the subject..."*), the size of the group of students (A2: *"The applied methods depend on both the taught subject and the size of the group of students. I believe that the methods I choose help to achieve the intended learning outcomes"*), the readiness of the group to apply the selected method (B5: *"The vast majority of students fail to properly prepare for the debate or the role play, are lazy to read, cannot express their thoughts and would rather listen"*), and the field of study (B5: *In the Faculty of Technology I use less different methods than in the Faculty of Social Sciences. Students of technological specialties are less inclined to speak, they are more likely to work independently*"). During the interviews, teachers distinguished the following most commonly applied teaching methods: case analysis, group work, discussion, consultation seminar, lecture, exercise, project, seminar, presentations prepared by the students.

Out of all creative methods, teachers of higher education institution A usually apply projects, group work and case analysis, while teachers of higher education institution B pay most of their attention to case analysis and problem-based tasks. Out of all informative methods, teachers of higher education institution A usually apply discussion, consultation seminar and lectures, while teachers of higher

education institution B pay most of their attention to lectures and discussions. Out of all operational methods, teachers of higher education institution A usually apply workshop and simulation, while teachers of higher education institution B pay most of their attention only to workshops. Teachers of higher education institution A believe that the most important methods for the development of self-leadership include discussion, guest speakers, group work, problem-based tasks, creative workshops, presentations prepared by the students, while teachers of higher education institution B distinguish discussion, group work, debate, problem-based tasks and projects as the most important methods for the development of self-leadership.

In summary, it can be concluded that teachers of higher education institution A pay more attention to informative teaching methods and more efficiently employ resources from the environment, while teachers of higher education institution B pay more attention to case analysis and problem-based tasks.

Conclusion

1. The assessment of the impact of teaching methods on the expression of self-leadership from the students' point of view reveals that the strategy dimensions of self-leadership are not fully mastered in both higher education institutions. All three strategies of self-leadership are more strongly expressed in higher education institution A. The top rated self-rewarding skills stress that self-rewarding is one of the most expressed instruments of self-motivation. The skills of self-cueing were lowest rated in the study programs falling within the field of social sciences. All three strategies of self-leadership were more strongly expressed in study programs attributable to the field of technologies.

Averages significantly differ between fields of science taking into account relevant leadership dimensions / qualities: self-cueing, self-observation and successful visualization while performing works. These dimensions of self-leadership are more strongly expressed in study programs attributable to the field of technologies. The correlation analysis clearly reveals that leadership dimensions / qualities are related, i. e. with some features developing, others are also automatically developing, or vice versa. A strong correlation exists between the focus on natural endowment and the assessment of beliefs and attitudes. The correlation analysis of leadership features demonstrates the importance of development of a leader as a versatile personality. A very strong relation exists between constructive thought and behaviour-focused strategies of self-leadership, relations among other strategies are also rather strong.

Students of study programs falling within the fields of social sciences indicate operational methods as the most important for the development of self-leadership, while students of study programs attributable to the field of technologies consider informative methods to be the most important for the development of self-leadership. Creative methods are equally important to both fields of study.

Informative methods are more frequently applied by students of study programs attributable to the field of technologies, while the application of operational and creative methods does not statistically differ.

In both higher education institutions, students distinguished creative methods as the most important teaching methods for the development of self-leadership, however, their application was the lowest in higher education institution A. In higher education institution B, informative methods were the most rarely used. The significance of teaching methods for the development of self-leadership differs between fields of science: there is a statistically significant difference between operational and informative methods. By the higher education institution, there is a difference only between the significance of operational methods. The importance and application of informative methods differ both by the field of science and by the higher education institution.

2. The analysis of the impact of teaching methods on the expression of self-leadership from the teachers' point of view reveals that teachers describe a student with self-leadership qualities as active, enterprising, inquisitive, self-confident, able to organize the group work, purposeful, disciplined, sociable and adventurous. Self-leadership has a positive impact on learning outcomes or is partially related to better learning outcomes. Student's personal goals, purpose, self-motivation, practice of group work and teacher's personality constitute the most important aspects for the student to develop self-leadership. Where necessary, however, not very enjoyable tasks are performed (behaviour-focused strategy), usually applied teaching methods include case analysis and discussion. In this case, teachers attempt to provide students with basic knowledge required to perform the task, to present the task as amusingly as possible, or to motivate to engage into it. In order to reveal the aspects of an enjoyable task and to motivate students to perform it (natural reward strategy), usually creative teaching methods are applied. Such teaching methods as discussion, case analysis, problem-based tasks, creative tasks mostly help to shape students' thinking models, which have a positive impact on the intended activity (constructive thought strategy). Teaching methods applied by teachers depend on the specifics of the taught subject, the size of the group of students, the readiness of the group to apply the selected method, and the field of study. During the interviews, teachers distinguished the following most commonly applied teaching methods: case analysis, group work, discussion, consultation seminar, lecture, exercise, project, seminar, presentations prepared by the students. Teachers of higher education institution A believe that the most important methods for the development of self-leadership include discussion, guest speakers, group work, problem-based tasks, creative workshops, presentations prepared by the students, while teachers of higher education institution B distinguish discussion, group work, debate, problem-based tasks and projects as the most important methods for the development of self-leadership. In summary, it can be concluded that teachers of higher education institution A pay more attention to informative teaching methods and more efficiently employ resources from the environment, while teachers of higher education institution B pay more attention to case analysis and problem-based tasks.

3. The following recommendations for the improvement of teaching methods developing the self-leadership of students can be made:

- Since the strategy dimensions of self-leadership are not fully mastered in both higher education institutions, it is necessary to pay more attention to this area;
- In study programs falling within the field of social sciences, more attention should be paid to the application of operational methods developing self-leadership;
- Where necessary, however, not very enjoyable tasks are performed (behaviour-focused strategy), it is advisable to apply creative teaching methods;
- Such teaching methods as discussion, case analysis, problem-based tasks, creative tasks mostly help to shape students' thinking models, which have a positive impact on the intended activity (constructive thought strategy);

In both higher education institutions, it is advisable to apply creative methods as the most important methods for the development of self-leadership.

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BUSINESS MANAGEMENT IN NEW GLOBAL ECONOMY

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Abstract

The paper discusses the problem of strategic management in new global economy in the Czech Republic. The authors deal with the fact that the process of global interconnection of processes on a European and global scale requires the synthesis of classical approaches with new knowledge especially in the area of corporate governance and corporate strategy. The theory defines globalization processes and their impacts on the corporate environment, processes and decision making, characteristics of factors and processes influencing the corporate strategies. In a large sample of enterprises from the Czech Republic, the paper analyses the current situation of strategic management classified by sectors and size, including their scope of activities (local, national, global). The conclusion of the paper discusses the results of the research, the emerging trends that are applied to the corporate strategy as indicated by the research.

Key words: *globalization, business strategy, new economy, strategic methods.*

JEL Classification: O2, M2

Introduction

The managers of corporate businesses, mostly at the top-level, keep highlighting a growing discrepancy between the process of strategic management and the changes taking place in the external environment. It is possible to say that Czech companies have reached the milestone of their further development. It is necessary to change both the inner corporate architecture and the actual process of strategic management and decision-making.

Both, the professional community and the public have discussed the question whether the process of unification and interconnection of the world economic system is still taking place in the originally defined framework, or whether we are witnessing a

new regrouping, defining a new global economic system. The arrangement of the global and European business ring, its concentration into new global and regional centres suggests that this process has already begun and it is growing stronger (Newbert, 2007, Armstrong a Shimizu, 2007, Greenspaen, 2008, Carr, Collis, 2011, Soukup a kol., 2015, Atkinson, 2016, Verbeke, Asmussen, 2016).

The following authors have gradually developed the attitude to globalization process and its impact on business environment (Madison, (2001), Cavanagh, Anderson, S. (2002), Robinson, (2002), Kinslingerová, Nový, (2005), Ghobadian, O'Regan, Thomas, Liu, J. (2008). Ambrosini a Bowman, (2009). Smith, Binns a Tushman, 2010, Soukup (2015), Atkinson (2016) and others. All the above mentioned authors share a similar definition of the globalization process (the existence of a process of globalization, impacts on the corporate environment, the emergence of new economic centres such as China, Japan and India, etc.); however, they differ in defining the content, effects, impacts and at last but not least in the possibilities of further development). Bertucci a Alberti (2003) define the process as a process of increasing the interdependence of markets and national economies, caused by the high dynamics of commodity trading, capital, services and the transfer of technology and know-how. By Kinslingerová and Nový (2005), globalization is the process of integrating society at a global level, which newly covers national, regional and local systems. Wolf (2006) emphasises that interconnecting the global economy has the effect that producers cease to be protected by geographical distance if they do not work efficiently and with sufficient speed in innovations also reported by Baldwin, von Hippel (2011). Rolný, Lacina (2008) see the danger of corruption and unethical behaviour of the corporate environment and the suppliers. Soukup and others (2015) specifies the processes of contemporary globalization as interrelated technological (technical), economic, social and political spheres. The technological aspect of globalization is expressed as the knowledge economy. Atkinson (2016) recommends ambitious measures in five areas: technology, employment, social security, capital sharing and taxation. Greenspan (2008) describes the general principles of economic growth, compares particular facts in the economies of all major countries and regions of the world, and explains where the lines of globalization are heading. Cihelková (2011) and others notice three other concepts in connection to globalization, in which globalization is in some kind of superiority. They mean internationalization (business activity resulting from the production process within the national economy), transnationalization (international trade with a closed national production process) and integration, addressing the issues of the functional and institutional organization of both the corporate and the supra-business sphere. The process of globalization and its related effects greatly affect the business environment and their behaviour. This is boosted by the fact that businesses have long been operating in a discontinuous and turbulent environment (Drucker, 1999), meaning an unpredictable, ever-changing and irregular environment.

The most common trends influencing the corporate environment and the strategy design and implementation is further discussed by Tellis (1989), Drucker

(1999), Kotler (2001). The demand for flexible decision-making, the acceleration of information flows and the use of modern information technologies is a requirement for modern business management. A major change in strategic direction is related to Porter's publications (1994, 2004), who says that business strategy is not dependent on the ability to anticipate change, the broad idea of which groups of customers and what needs will be strong in the next three and five years is more important. At the same time, he admits that good analysis is essential, but it is not, in his opinion, reasonable to create a business strategy in advance, as the company's path to finding a really good strategy can take several years. By Porter, there are five forces in a model as the most important part of a working strategy. The characteristics of the five forces and their relation is important as well as the analysis of the value chain, both for a sector and for a particular enterprise (Porter in Magretta, 2012).

The difference between the analytic approach and strategy design is described by Duggan (2007). As Keřkovský and Vykypěl (2006) notice, the strategic situational analysis or the assessment of the factors of the company's surroundings is a prerequisite for successful strategic decisions of managers is, i.e. the requirements and changes in the behaviour of customers, competitors, suppliers, but also the development of macroeconomic factors including the characteristics of internal company resources. A similar opinion with minor differences in defining different environments is expressed by a number of authors such as Collis, Rukstad, 2008, Dedouchovou (2001), Kinslingerovou a Nového (2005), Frynase a Mellahia (2011), Gintera, Duncana a Swayna, (2013). By Jakubíková (2008), strategic situational analysis is a comprehensive approach necessary to capture significant factors influencing the company's activities in a context. Sedláčková (2000) highlights the role of SA in strategic planning and decision-making at the top management level. She emphasizes the individual strategic methods of the business environment and its internal resources, which are involved in the creation of business potential. In her publications, focuses on strategic analysis, she describes the relations between strategy, organizational structure and business management system, and she also deals with the conflict of interests in the design and implementation. Authors define SA as a tool to protect business strategy based on the knowledge of its internal potential, possibilities and limits of its further development, taking into account the influences of the intermediate environment and the external environment.

Based on available reference, it is possible to assume that it is useful to use analytical methods in the strategic management of companies, and when formulating a functional strategy; however, it is important to take their structure and contents into account, since some of them are not universal in nature and cannot therefore be used universally. Other analyzes should be an additional tool of an enterprise-wide strategy.

Material and methods

The research was done in a sample of 461 enterprise from the Czech Republic; of the total, there were 109 micro-enterprises, 140 small enterprises (to 50 employees), 124 medium-sized enterprises (to 250 employees) and 83 enterprises with more than 250 employees. There were also 5 enterprises of mixed character (manufacturing, services and the primary sector). The most common occurrence of small and medium enterprises in the sample corresponds to the structure of economic entities in the Czech Republic, which is characterized by a large number of small and medium-sized enterprises. The enterprises were further classified by different industry sectors of the Czech Republic (excluding the quaternary sector), as production and industrial (188 enterprises), services (256 enterprises) and primary sector (14 enterprises) and by their scope as regional (194), national (126) or global (141) enterprises.

To perform the analysis, we used Pearson's chi-square test to assess the dependency of variables. In case of their dependence, the Cramer coefficient of contingency is determined

Formula 1: Pearson's chi-square test of independence

$$\chi^2 = \sum_{i=1}^r \sum_{j=1}^c \frac{(n_{ij} - e_{ij})^2}{e_{ij}}$$

if:

χ^2 chi-square X_i empirical frequencies (real)
 $N p_i$ theoretical frequencies (expected)

Two hypotheses are assumed – null (H0) and alternative (HA). H0 supposes there is no dependency between the variables and HA supposes there is a dependency. The assessment criterion to verify or reject the hypothesis is p-value of the <0.1> interval. If the resulting p-value $\square \square$ (at a specified level of significance $\square = 0.05$), HA will be confirmed. If the dependence between the selected characters is proved, Cramer's contingency coefficient (V), which indicates the degree of dependence of the variables, will be carried out as a complementary calculation.

Formula 2: Cramer's contingency coefficient

$$V = \sqrt{\frac{\chi^2}{n \cdot (q-1)}}$$

if:

χ^2 chi-square n number of respondents
 q number of columns

The research itself focused on three research questions:

- Does the formulation of an enterprise strategy depend on size categorization, sectoral differentiation and scope of the sample enterprises?
 H0: The formulation of an enterprise strategy depends on size categorization, sectoral differentiation and scope of the sample enterprises.
 HA: The formulation of an enterprise strategy does not depend on size categorization, sectoral differentiation and scope of the sample enterprises.
- Is it possible to indicate the dependence of internal and external strategic analyzes on size categorization, sectoral differentiation and scope of tested enterprises?
 H0: Internal and external strategic analyzes do not depend on size categorization, sectoral differentiation and scope of the sample enterprises.
 HA: Internal and external strategic analyzes depend on size categorization, sectoral differentiation and scope of the sample enterprises.
- Which activities (value-creating and secondary) affect the profitability of the tested enterprises in terms of the sectoral differentiation?

The third research question was analyzed using the dimensional reduction method, which extracts the information from the multidimensional data into a smaller number of variables (Cook, 1998), (Cook, R. D., & Lee, H. (1999), (Chiaromonte, Cook and Li (2002).

Dr(formula = HV ~ VSTUPLOG + VYROBA + VYSTUPLOG + MARK +
 SERVIS + NAKUP + VTR + RLZ + PINE, data = method = "sir")

Variables expressing the value potential of enterprises (value-creation and secondary activities):

HV-profit/loss, VSTUPLOG-input logistics, VYROBA-production, VYSTUPLOG-output logistics, MARK-marketing and sales, SERVIS-customer service, NAKUP-material purchase, VTR- Science and technology development, RLZ-Human Resource Management, PINE-enterprise infra-structure

Results and discussion

Table 1: Developing strategic goals in the corporate sphere based on size of an enterprise

Existence of corporate strategy			
Size of an enterprise	no	yes	In total
small enterprise (less than 50 employees)	82	58	140
micro-enterprise (less than 10 employees)	80	34	114
medium enterprise (50-249 employees)	50	76	126
large enterprise (250+ employees)	13	70	83
In total	225	238	463

Source: authors

p-value = 0.0000000000000199 V = 0.3784

Table 2: Developing strategic goals in the corporate sphere based on sectors

Existence of corporate strategy			
Sectors	no	yes	In total
primary sector	8	6	14
services	136	120	256
manufacturing and industry	81	112	193
In total	225	238	463

Source: authors

p-value = 0.1343

Table 3: Developing strategic goals in the corporate sphere based on the scope

Existence of corporate strategy			
Scope	no	yes	In total
A global enterprise	47	97	144
A national enterprise	65	63	128
A regional enterprise	113	78	190
In total	225	238	463

Source: authors

p-value = 0.00000976 V = 0.2223

Based on the analyses performed and the statistical evaluation (see Table 1, 2, 3), the dependence of the company strategy on the size category of the enterprise and its scope (local, regional, national and global) was proved. On the other hand, it was not proved in sectoral differentiation.

Regarding the size of enterprises, we confirmed the assumption that the larger enterprise, the better level of its strategic management and development. Similar reason applies in case of different scopes. The broader scope, the better is the level of corporate strategy.

Enterprises with a Czech ownership show a tighter dependence compared to those enterprises (subsidiaries) which management is from abroad and the overall corporate strategy is naturally set. The fact that the dependence of the business strategy on the business sector has not been demonstrated indicates the general nature and need for strategic management of enterprises, and that changes, occurring in the external environment of enterprises, affect all sectors of the national economy, although with varying intensity and frequency.

The results of the testing of the dependence of internal and external analyses on size categorization, sectoral differentiation and scope of the tested enterprises are shown in tables 4 and 5.

Table 4: Dependence of internal analyses on size categorization, sectoral differentiation and scope of the tested enterprises.

Analysis	Sectoral difference	Size of enterprise	Scope
	P.value	p.value	p.value
SWOT analysis	0.8921	0.4663	0.4305
Portfolio analysis	0.3586	0.8461	0.1377
Analysis of internal enterprise resources	0.3162	0.4976	0.5966
Key success factors	0.9874	0.1927	0.2976
Analysis of internal competitiveness	0.3086	0.4195	0.9636
BCG matrix	0.871	0.4078	0.9106
Value chain analysis	0.008428	0.1927	0.6386
SPACE analysis	0.913	0.3004	0.887
Analysis of high profile business	0.6613	0.9451	0.3936
GE Model	0.6139	0.7167	0.5219

Source: authors

Table 5: Dependence of external analyses on size categorization, sectoral differentiation and scope of the tested enterprises.

Analysis	Sectoral difference	Size of enterprise	Scope
	P.value	p.value	p.value
Competitors' analysis	0.6514	0.1242	0.5069
Porter's five forces analysis	0.7713	0.671	0.6984
STEP analysis	0.8112	0.3615	0.1917
Strategic mapping	0.198	0.437	0.7463

Scenarios (predictions of the enterprise's external environment)	0.429	0.6221	0.8786
Analysis of industry attractiveness	0.1391	0.8971	0.903
Analysis of the economic characteristics of the sector	0.935	0.7879	0.2913
Stakeholder analysis	0.8808	0.04944	0.9808
Analysis of the life cycle of the sector	0.5083	0.4595	0.1912
Analysis of the driving forces in the sector	0.4083	0.01219	0.09801
Strategy clock	0.8145	0.3031	0.2803

Source: authors

Regarding internal analyses, the dependency was proved in sectoral differentiation only, in particular in the value chain analysis. Such result should be seen as the most important and of the highest priority for the research. It is in line with current research of M. Porter, in which the analysis of the value chain is considered as one of the decisive methods in formulating the corporate strategy in the future together with the analysis of competition in the sector - Porter's model of five forces.

Also, the authors' assumption of the sectoral characteristics of the value chain, and its universality, has been confirmed, the general validity of which did not prove dependence on the size categorization or on the scope of the companies. However, the authors of the article agree with this view, but at the same time they believe that other analytical methods are also based on the situational analysis, but it is necessary to modify and innovate in the light of changes taking place in the external environment of enterprises.

Regarding the external analyses, a dependency was also found in sectoral differentiation only, in particular in analyses of stakeholders and the driving forces in the sector. This result also confirms the increasing importance of value orientation

in the formulation of corporate strategies and the creation of corporate production potential.

In relation to the results of the importance of different methods in designing corporate strategies, value-creating and secondary activities were tested by their influence to profit of enterprises in different sectors (a sectoral nature of the value chain). We used the method of dimensional reduction. Its results are shown in table 6.

Table 6: Influence of value-creating and secondary activities to the profitability of sample enterprises based on sectoral differentiation of enterprises

	Dir1	Dir1	Dir1
	Services	Manufacturing	Primary sector
Input logistics	-0.25018	0.46983	-0.27304
Production/ services	0.28829	0.12189	0.08532
Output logistics	0.21485	-0.21121	0.03413
Marketing and sales	0.51556	0.02312	0.58020
Customer service	0.41392	-0.05822	-0.30717
Purchase	0.49602	-0.41119	0.30717
Science and technology development	0.31494	0.62247	-0.56314
Human Resource Management	-0.06629	0.37053	-0.27304
Enterprise infra-structure	-0.14621	0.14844	-

Source: authors

We repeatedly confirmed the sectoral differentiation in the sample activities, with the most important differentiation to manufacturing enterprises, services and primary sector.

Regarding the manufacturing enterprises, their profit is mostly influenced by science and technology development and human resource management. In general, all the factors in the sector are the important production parameter. Regarding the services, marketing and sales, purchase and customer service are important. Here it is also possible to state that the specifics of the service sector are fully reflected and that the activities identified are at the forefront of the interest of the service enterprises. The results from the primary sector are considered by the authors to be only indicative (the number of enterprises will increase), but the marketing and sales activity (same as for services) and the purchase correspond to the sectoral focus.

Conclusion

Considering the first research question, we proved that the formulation of an enterprise strategy depends on size categorization, and scope of the enterprises. The dependency was not proved for the sectoral differentiation. It was proved that the larger enterprise, the more necessary it is to strategically manage an enterprise and to decide due to more intense changes in the external environment. A similar reason applies for the dependency within business scope as a similar trend is probable – the broader the scope, the larger enterprise. The research within this factor proved that there is an influence of ownership structure as for enterprises with Czech owners the dependency is tighter compared to enterprises managed from abroad.

Regarding the dependency of internal and external analyses to size, sector and scope, the sample proved the dependency within the internal analyses for sectoral differentiation only for the analysis of the value chain. Such finding is seen as the most valuable for the issue by the authors. In the external analyses, a dependency was also found in sectoral differentiation only, in particular in analyses of stakeholders and the driving forces in the sector. Such results support the results of the internal analyses. In testing the value potential of enterprises taking their influence on profit into account, sectoral impact was proved. In manufacturing enterprises, science and technology development, input logistics and human resource management are the most important. On the other hand, in service sector, marketing and sales, purchase and customer service are important. The results from the primary sector are considered by the authors to be only indicative due to a number of enterprises in the sample; however, marketing and sales and purchase were also the most important.

The results confirm the activities sometimes defined in theory only with increased importance for the development and stability of the particular sector. The results of the research, in particular confirming the importance of value in creating business potential, are supposed to be described as a significant achievement in the necessary innovation of situational business analysis

Business practice expects methodological approach designed by research centres to create a valuable enterprise potential. The paper is a modest attempt to meet the final goal.

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THE UNIVERSITY OF BELGRADE ON ARWU LIST: Part II THE IMPACT OF INDIVIDUAL RESEARCH INSTITUTES ON THE ACHIEVED POSITION USING PROMETHEE – GAIA METHOD

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Abstract

This paper presents the results of the research on the number of the published papers in the journals from SCIE and SSCI lists and the number of hetero citation per researchers at the Research institutes (RI) within the University of Belgrade (UB) in the period from 2011 to 2015 and their influence on the position of the UB on the ARWU list. The RIs were ranked according to the following criteria: the number of papers per researcher from the RI in the journals from SCIE and SSCI lists, the number of hetero citation per researcher and the number of hetero citation per paper and researcher with the impact of 20, 30 and 50%, respectively. PROMETHEE II-GAIA, a method of a multi-criteria analysis, was applied to define the parameters and criteria which were used to determine the degree of the influence of the Vinca Institute of Nuclear Sciences (INN), as well as the influence of all the other RIs compared to the faculties within the UB

Key words: *RIs ranking, University of Belgrade, ARWU list, PROMETHEE II-GAIA*

JEL Classification: C02, C44, I23

Introduction

The structure of many universities in the world consists of, beside faculties, independent research institutes (RIs), which provide an opportunity to increase scientific competence through mutual cooperation of the professors and researchers, which further contributes to higher quality of the output of the educational process, in particular at the PhD level (Wijetunga, 2002; Arsic, Milijic, Zivkovic, Nikolic & Zivkovic, 2012). The integrated multidisciplinary studies which include university professors as well as the researchers from RI are formed at the University. By doing

so, the researchers are provided with the opportunity to acquire teaching competence. This way, the reputation and rank of the University grows on the basis of realized synergies of the quality of the scientific work that is realized within the faculties and RIs (Bornmann and Werner, 2014).

University of Belgrade (UB) consists of 31 independent faculties (Zivkovic, Arsic, Nikolic, 2017) and 11 RIs, which employ around 1,338 researchers, and they together, with the developed scientific-research infrastructure, represent a significant potential of the UB. Scientists from these RIs are involved in teaching process at the UB, especially in the realization of the multidisciplinary studies.

UB consists of following individual research institutes (IR):

- Electrical Engineering Institute Nikola Tesla (EI),
- Institute for Biological research „Sinisa Stankovic“ (IBI),
- Institute for Medical Research (IMI),
- Institute of Molecular Genetics and Genetic Engineering (IMGGI),
- Institute for Multidisciplinary Research (IMDI),
- Vinca Institute of Nuclear Sciences (INN),
- Institute for Applied Nuclear Energy (IPNE),
- Institute of Physics Belgrade (IF),
- Institute for Chemistry, Technology and Metallurgy (IHTM),
- Institute „Mihajlo Pupin“ (IMP),
- Institute for Philosophy and Social Theory (IFDT).

The quality of knowledge transferred to students at the universities is a direct reflection of the quality of the scientific work which is measured with the awards for achieved scientific results, the number of publications in the best international journals as well as with the number of hetero citation (Wijetunga, 2002; Arsic, et al., 2012; Abramo, Cicero & D'Angelo, 2013; Saarela, Karkkainen, Lahtonen & Rossi, 2016). For these reasons, the structure of the University includes special research centers within the faculties themselves, as well as RIs, which in synergy with the faculties improve the quality of the scientific work at the University (Abramo et al., 2013), and their scientists are involved in the teaching process at the university or on integrated studies which are realized at the University (Cotten and Price, 2006; Docampo, 2013; Lin, Hsuan & Chen, 2013).

The University ranking has become very popular at the beginning of the 21st century, in order to attract the best students (Millot, 2015). There is a growing number of the university rankings in the world, among which are the most popular (Millot, 2015; Olcay and Bulu, 2016):

- QS World University Rankings (published since 2000);
- Academic Ranking of World Universities (ARWU), Shanghai Ranking (published since 2003);
- Times Higher Education World University Ranking – Thomson Reuters (published since 2010) etc.

The most popular ranking in Europe is ARWU list which consists of the 500 best universities in the world and includes less than 2% of all universities. On this list,

the first 100 universities are ranked according to their quality, and the remaining 400 are arranged by alphabetical order into four clusters: 101-200; 201-300; 301-400 and 401-500. The University of Belgrade, Serbia (UB) appeared for the first time on the ARWU list in 2012, in a cluster 401-500. In 2015, the UB moved to a cluster 201-300 and it is the best ranked university in the South-Eastern Europe (Zornić, Markovic & Jeremic, 2014). Beside the UB on this list, among the best 500 in the world are the University of Ljubljana (Slovenia), Eötvös Lorand University and the University of Szeged (Hungary), all in the cluster 401-500 (Živković et al., 2017).

Material and Methods

Table 1 presents the number and structure of the employees at the institutes within the UB, at the end of 2015.

Table 1: Number and structure of the employees for each RI in 2015.

	Research trainee	Research associate	Senior research associate	Principal Research Fellow	Total
EI	0	9	0	1	10
IBI	94	78	37	57	266
IMI	10	39	6	11	66
IMGGI	32	38	8	11	89
IMDI	25	20	10	22	77
INN	142	110	39	45	336
IPNE	16	7	2	4	29
IF	36	49	9	138	232
IFDT	9	11	1	2	23
IHTM	64	45	24	43	176
IMP	0	21	3	10	34

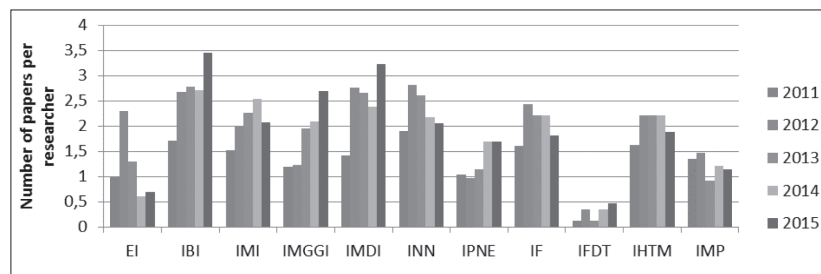
Source: Own, based on faculties' website

The number of the researchers employed at the RIs is 1338 which represents 25.5% of total number of researchers employed within the UB. The total number of the researchers employed at the faculties at the UB, at the end of 2015, was 3,859 researchers, or 75.5% (Živkovic et al., 2017).

Results and Debate

One of the main criteria for ranking universities in the prestigious ARWU list is the number of publications in the journals on SCIE and SSCI lists (Bonaccorsi and Cicero, 2016). In order to be able to assess the quality of RIs due to the difference in the number of the employed researchers (for example 336 researchers in INN and 23 in IFDT), the number of publications in the observed period was calculated on the average per employee researcher in the scientific institution (Zivkovic et al., 2017). Figure 1 shows the trend of published papers per researcher in the observed period 2011 - 2015.

Figure 1: The number of papers per researcher for each RI



Source: Own, based on Scopus database

The same clusters are used for ranking of the RIs and the faculties at the UB for the same period (Zivkovic et al., 2017): Cluster A - above 10 papers per researcher; Cluster B - between 5 - 10 papers per researcher; Cluster C - up to 5 papers per researcher in the given scientific institution. Ranking of the individual RIs by the criterion number of papers per researcher in the journals on the SCIE and SSCI lists for the period 2011-2015., is shown in Table 2.

Table 2: Ranking of the RIs by the criterion number of papers per researcher for the period 2011-2015.

Institute	Number of papers/number of researchers	Cluster	Scientific filed
INN	13.94	A	MD
IBI	13.65	A	SM
IMDI	13.02	A	MD
IF	11.54	A	SM
IMI	11.15	A	MS
IMGGI	10.78	A	MS

IHTM	10.60	A	TES
IE	10.39	A	TES
IPNE	9.31	B	TES
IMP	8.84	B	TES
IFDT	2.87	C	SSH

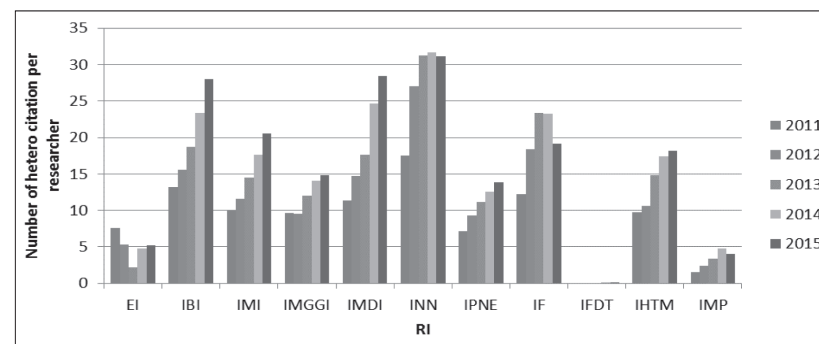
Note: MD - Multidisciplinary sciences; MS - Medical sciences; SSH- Social sciences and humanities; TES - Technology and Engineering science

Source: Own, based on Scopus database

The results presented in Table 2 show a drastic difference in the positioning of INN, IBI and IMDI, in relation to the other institutes. By comparing these results with the adequate performance results of the faculties at the UB (Zivkovic et al., 2017), only the Faculty of Chemistry achieved the index 15.04, and, also, four other faculties had an index higher than 10 (Faculty of Biology, Faculty of Physical Chemistry, Faculty of Technology and Metallurgy and Faculty of Pharmacy). Having in mind that eight out of 11 RIs reached index above 10, the performed results of RIs according to this criterion require special attention.

Paper published in the journals with IF is the result worth of attention and as such is used as the main criterion for defining the competencies of the researchers, for election to the scientific position and justification of the scientific research within the financial funds. However, the real value of the published results can be seen as its impact on the development of scientific thought in the world, measured by the number of hetero citations achieved in journals with IF (Bornmann and Werner, 2014; Metcalf, Stocs, Summers & Wood, 2015). Figure 2 shows the results of the number of hetero citations per researcher for each RI within the UB for the period 2011-2015. It must be emphasized that only citations of papers published in 2011 and later are presented here.

Figure 2: The number of citations per researcher for each RI



Source: Own, based on Scopus database

Table 3 shows the ranking list of RI according the number of hetero citations per researcher criterion for the period 2011-2015. RIs are divided into three clusters in terms of the number of hetero citations per researcher greater than 10 (major impact - A cluster), in the range 5 - 10 (medium impact- Cluster B) and in the range 0-5 citation (low impact - Cluster C). The same classifications was used for faculty' ranking in the work Zivkovic et al (2017).

Table 3: Ranking of RIs by the number of citations per researcher in period 2011-2015 criterion

Research institute	Number of hetero citation/Number of researchers	Cluster	Scientific field
INN	162.41	A	MD
IMDI	113,39	A	MD
IBI	102,43	A	SM
IF	101,93	A	SM
IPNE	93,62	A	TES
IMI	80.61	A	MS
IHTM	76.62	A	TES
IMGGI	75.40	A	MS
IE	56.83	A	TES
IMP	24.70	A	TES
IFDT	0.20	C	SSH

Source: Own, based on Scopus database

The obtained results indicate that 10 out of 11 RIs within the UB are in the cluster A, with the index higher than 10. Compared to the ranking of the faculties at the UB, it can be concluded that only 8 faculties, out of 31, are found in Cluster A, where the best ranked, the Faculty of Physical Chemistry with the index 39.93, would be placed as 10th on the list in front of the IMP and IFDT.

The criterion Number of hetero citations per published work and per researcher for any scientific research institution reflects, in the best way, the quality of the scientific work and its impact on the development of scientific thought in the world, which affects the quality of the teaching process and knowledge of the graduate students at certain faculties and universities.

Table 4 shows the results of ranking the UB institutes by the number of hetero citations per published paper and researcher criterion. The same clusters were used for classification of RIs as in Zivkovic et al (2017): Cluster A - above 1.5, Cluster B - between 1-1.5, Cluster C - below 1 hetero citation per paper and researcher.

Table 4: Ranking of the impact of RIs by number of citation and number of papers per researcher criterion

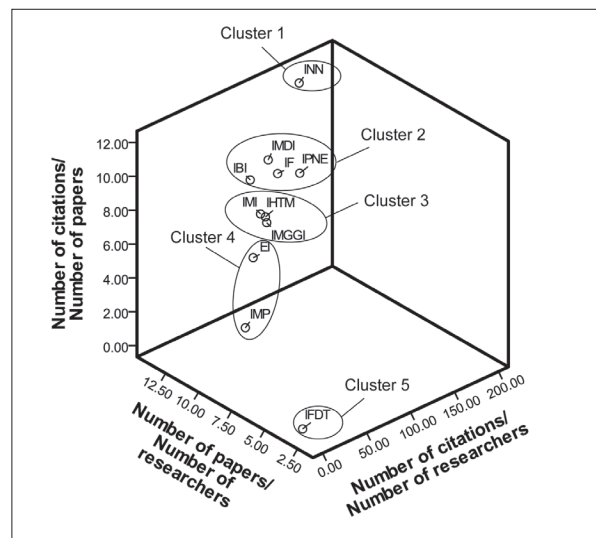
Institutes	Number of citation/number of papers per researcher	Cluster	Scientific field
INN	11.65	A	MD
IPNE	10.05	A	TES
IF	8.83	A	SM
IMDI	8.71	A	MD
IBI	7.50	A	SM
IMI	7.23	A	MS
IHTM	7.22	A	TES
IMGGI	6.99	A	MS
IE	5.47	A	TES
IMP	2.79	A	TES
IFDT	0.07	C	SSH

Source: Own, based on Scopus database

The obtained results, as in the case of the number of hetero citations by the researcher criterion, differ even to a greater extent from those obtained in the faculties' ranking within the UB. It can be seen that 10 out of 11 RIs belong to Cluster A, and only IFDT belongs to Cluster C. The best placed faculty according to this criterion is the Faculty of Physical Chemistry with index 3.41, and it would take 10th place in the overall rankings, above IFDT and IMP.

Bearing in mind the obvious differences in the performance of the RIs and the faculties within the UB, it is clear that the same criterion for defining clusters for both groups of institutions, cannot be used. Figure 4 shows the results of the ranking by all three criteria: the number of published papers, the number of citations and the number of citations per published paper per researcher.

Figure 3: The impact of individual RI by the following criteria: the number of papers, the number of citations and the ratio number of citations and number of papers per researcher



Source: Own, based on Scopus database

Five clusters of the influence can be identified according to Figure 3:

- Cluster 1: INN
- Cluster 2 : IMDI; IBI; IPNE; IF
- Cluster 3 : IMI; IHTM; IMGGI
- Cluster 4: EI; IMP
- Cluster 5: IFDT.

Evaluating the importance of each RI by multi-criteria model

None of the faculties and RIs within the UB do not fulfill three out of six criteria for the ranking of the universities on the ARWU list, in regard to winning the Nobel Prize and publications in the journals Nature and Science (Zornić, et al., 2014, Millot, 2015). Therefore, for multi-criteria ranking following criteria (C) were taken:

- The number of published papers in the journals from SCIE and SSCI lists per researcher – 20%
- The number of citations per researcher, according to SCOPUS database -30% and
- The number of citations per published paper and researcher – 50%.

The PROMETHEE / GAIA method defined by the Brans, was used for multi-criteria ranking of 11 RIs (Daraio, Bonaccorsi & Simar, 2015) according to above mentioned criteria, in the period from 2011 to 2015, (Brans and Vincken, 1985 Brans and Mareschal, 1994). This well-known multi-criteria methodology has been widely

used in the scientific literature for ranking of the similar issues (Macharis, Springael, De Brucker & Verbeke, 2004; Behzadian, Kazemzadeh, Albadvi & Aghdasi., 2010). Detailed procedures of PROMETHEE II methodology, which was used in this study, are described in the literature (Al-Shiekh Khalil, Shanableh, Rigby & Kokot, 2005; Ishizaka and Nemery, 2011).

For the data presented in Table 5, the initial parameters necessary for the implementation of PROMETHEE II complete ranking were defined, whereby for all three criteria, in the multi-criteria model, V-shape function of preferences with preference threshold $p = 100\%$, was selected (Vego, Kucar-Dragicevic & Koprivanac, 2008).

Also, authors defined the percentage of importance of each of the criteria in the model, where the greatest importance, 50%, was given to ratio (criteria 3-C3) the number of citations / number of papers, while the remaining 50% was distributed to the other two criteria C1 and C2 with the percentage of importance 30% and 20%, respectively.

Table 5: The initial table for evaluation of 8 RIs of UB

	Number of papers per researcher C1	Number of hetero citation per researcher-C2	Number of hetero citations per paper and researcher - C3
Min/Max	Max	Max	max
Weight	20	30	50
Preference function	V-shape	V-shape	V-shape
Thresholds	Percentage	Percentage	percentage
P	1.00	1.00	1.00
INN	13.94	162.41	11.65
IBI	13.65	102.43	7.50
IMDI	13.02	113.39	8.70
IF	11.54	101.93	8.83
IMI	11.15	76.62	7.23
IHTM	10.78	76.62	7.22
IMGGI	10.60	75.40	6.99
EI	10.39	56.83	5.46
IPNE	9.31	93.62	10.05
IMP	8.84	24.70	2.79
IFDT	2.87	0.20	0.07

Source: Own, based on Scopus database

Based on the initial table for evaluation of RIs, positive ($\phi +$) and negative flow of preferences ($\phi -$) were determined as well as the value of net flows (ϕ) for each RI, respectively. Results of the PROMETHEE II rankings are shown in Table 6.

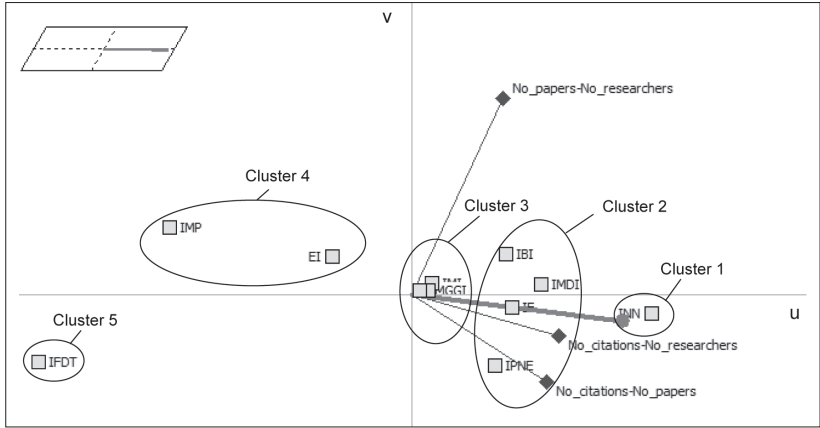
Table 6: The results of PROMETHEE II final ranking

Multicriteria flows	ϕ_i^+	ϕ_i^-	ϕ	Rank
INN	0.635	0	0.635	1
IMDI	0.3741	0.0408	0.3333	2
IF	0.3297	0.0546	0.2751	3
IPNE	0.3557	0.0861	0.2697	4
IBI	0.3108	0.0827	0.2281	5
IMI	0.2213	0.1578	0.0635	6
IHTM	0.2173	0.1622	0.0551	7
IMGGI	0.211	0.182	0.0289	8
EI	0.1837	0.3984	-0.2148	9
IMP	0.1	0.774	-0.674	10
IFDT	-1	-1	-1	11

Source: Own, based on Scopus database

Table 6 shows the results of the overall ranking using PROMETHEE II methodology, according to defined criteria C1 - C3 and corresponding weight for each optimization criteria. The obtained results are graphically displayed in GAIA plane, Fig.4.

Figure 4: GAIA plane



Source: Own, based on Scopus database

Based on the position of the decision elements (institutes are presented with squares, and criteria by axes) in the GAIA plane it is possible to graphically confirm

the previous PROMETHEE II ranking results. It can be concluded, based on the results shown in Figure 4, that 5 clusters could be extracted, which include 8 RI within the UB from 4 scientific fields. Based on the distance of INN from the origin, and in relation to its favorable direction regarding the two most relevant criteria in the model, as well as the proximity to decisions stick pi, it can conclude that this RI gives the most extent contribution to the position of the UB on the ARWU list, and therefore it is the only RI located in Cluster 1. Cluster 2, consists of IBI; IMDI; IF and IPNE and their position and proximity in relation to criteria C2 and C3 are almost the same. The third cluster, consists of the RIs with lower net positive flow value: IMGGE, IMI and IHTM. Finally, in clusters 4 and 5 are RIs: IPM, EI, and IFDT, with the achieved negative net flow values, so their position in GAIA plane is such that they are positioned opposite of vectors of all three criteria and significantly away from the center of GAIA plane.

Conclusion

Comparative analysis of the contribution to a very high position of the UB on ARWU list of its members faculties (31) and RIs (11) according to the criteria (the number of papers per researcher - C1; number hetero citations per researcher - C2 and the number of hetero citation per published paper and researcher - C3 with the percentage of importance for each of the criteria 20, 30 and 50%, respectively) we can conclude that INN - Vinca, along with the RIs IPNE, IF, IMDI, IBI, AND WE; ICTM, IMGGE, and IE, as well as the following Faculties: Fphy.Che , FTM, FPhys., FM and FCh have the predominant impact (Zivkovic et al., 2017).

The dominant effect of the eleven RIs within the UB on the position of the UB on ARWU list is obvious. The exception is the IFDT. The institutes offer higher scientific performance (number of papers and the number of hetero citations in the journals from SCIE and SSCI lists) compared to the thirty-one faculties. The results obtained in this paper are probably such due to the fact that the scientists in the RIs deal mainly with the scientific work with much better infrastructure conditions, whereas, at the faculties within the UB that is not the case, which can explain better scientific results at the RIs. The researchers at faculties are engaged in the teaching process at all three levels of study and daily activities with the students leave less time for scientific work, which explains the weaker results at the same university (UB).

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