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# Working Later in Life: How Research Frames the Challenges and Possibilities of Ageing at Work<sup>1</sup>

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## ABSTRACT

**Objectives:** This study explores how academic literature addresses the professional inclusion of older adults in the workforce. It investigates emerging patterns and proposed solutions to support later-life employment in the context of demographic ageing and the active ageing policy paradigm.

**Methodology:** The paper adopts a Structured Literature Review (SLR) methodology, combining bibliometric and thematic analyses. A total of 161 peer-reviewed journal articles published between 2012 and 2024 were analysed using performance metrics and co-occurrence clustering to identify key themes and intellectual trends.

**Findings:** The analysis identifies five main thematic clusters: policy narratives, digital inclusion, workplace flexibility, emotional well-being, and place-based autonomy. These findings reflect a shift from deficit-based to relational and context-sensitive understandings of ageing at work. However, the literature remains fragmented and limited in intersectional scope.

**Value Added:** This study provides a novel, multidimensional synthesis of the literature on ageing and work by integrating bibliometric and thematic approaches. It bridges conceptual gaps across disciplines and proposes a coherent framework to guide future policies, organisational strategies, and research on age-inclusive employment.

**Recommendations:** Organisations and policymakers should adopt inclusive, age-sensitive strategies. They should promote lifelong learning opportunities, enable flexible and phased retirement options, reduce age-related bias in human resource practices, and design physical and social environments that support autonomy, well-being, and meaningful participation for older adults.

**Key words:** Active Ageing, Older Workers, Age-Inclusive Employment, Structured Literature Review (SLR), Human Resource Management (HRM)

**JEL Codes:** J14, J26, J21

# Introduction

The progressive ageing of the global workforce is reshaping how labour markets, organisations, and policymakers address employment across the life course. In the European Union, the number of employees aged 55 or older rose from 23.8 million in 2010 to nearly 40 million in 2023, driven by higher retirement ages, longer life expectancy, and better health (Eiffe et al., 2025). This demographic shift intensifies the need to understand how professional participation can be sustained and adapted in later life. While the rhetoric of “active ageing” promotes the view of older adults as vital contributors to society, significant discrepancies persist between these aspirations and the organisational, cultural, and policy realities that older workers encounter. For instance, despite policies encouraging extended working lives, many organisations have yet to implement age-inclusive practices effectively, leading to challenges in retaining and supporting older employees.

Research on ageing and work has expanded across multiple disciplines. In gerontology and public policy, the focus has been placed on social inclusion, well-being, and active participation (Foster & Walker, 2015). Human resource management (HRM) and organisational behaviour studies have, in parallel, explored how work systems and practices can be recalibrated to support ageing employees (Kooij et al., 2010). However, despite the growth of scholarship, existing knowledge remains fragmented, with limited integration between policy frameworks, organisational initiatives, and the lived experiences of older workers (Post & Byron, 2015). Moreover, the literature remains compartmentalised across disciplinary and institutional boundaries, limiting the development of unified models of age-inclusive employment.

To address this gap, the paper investigates two research questions:

- RQ1. *What are the main bibliometric and thematic patterns in the literature on support for older workers?***
- RQ2. *What policy, organisational, and managerial solutions are identified to support the professional inclusion of older adults?***

A Structured Literature Review (SLR) methodology was employed, integrating bibliometric and thematic analysis. The selection of this method is justified by the need to systematically organise and critically synthesise a multidisciplinary and evolving body of knowledge, ensuring transparency and replicability (Zupic & Čater, 2015; Massaro et al., 2016). The bibliometric analysis enables the identification of performance trends and intellectual structures, while thematic clustering captures underlying conceptual orientations.

The analysis, based on 161 peer-reviewed journal articles published between 2012 and 2024, reveals a dynamic field structured around five thematic clusters: (1) active ageing and autonomy; (2) societal perceptions of demographic change; (3) agency and place in later life; (4) emotional and social dimensions of ageing; and (5) policy narratives and cross-national perspectives. These findings illustrate a gradual shift from medicalised and deficit-oriented perspectives towards relational, contextual, and socially embedded understandings of ageing and work.

The paper contributes theoretically by advancing a multidimensional conceptualisation of support for older workers that bridges individual, organisational, and societal levels. Methodologically, it demonstrates the efficacy of bibliometric and thematic integration in capturing fragmented scholarly landscapes. Practically, it highlights the need for more coherent, inclusive, and actionable strategies to promote the professional inclusion of older adults.

The structure of the paper is as follows: Section 2 provides the conceptual background; Section 3 details the methodology and data selection process; Section 4 presents the bibliometric and thematic results; Section 5 discusses the findings in relation to the research questions; and Section 6 concludes by outlining theoretical and practical implications, as well as suggesting directions for future research.

## Background

The progressive ageing of the workforce has reshaped the way labour markets, organisations, and policymakers approach employment across the life course.

Following the European Parliament's 2012 Resolution on "Active Ageing and Inter-generational Solidarity", ageing has increasingly been reframed not as a burden but as an opportunity for societal and economic participation (Tymowski, 2015).

However, despite this discursive shift, tensions remain between policy aspirations and workplace realities. Older adults continue to encounter persistent stereotypes regarding their productivity, flexibility, and adaptability (Taylor & Walker, 1998). Although the notion of work ability has offered a valuable conceptual foundation for sustaining employment in later life, translating this into concrete practices has proved complex and uneven across industries and national contexts (Ilmarinen, 2001).

Several studies highlighted that targeted HR strategies, such as flexible working arrangements, continuous learning opportunities, and age-sensitive career pathways, can effectively support older workers (Kooij et al., 2010). Nevertheless, organisational responses often remain fragmented. According to Armstrong-Stassen (2008), post-retirement employment, for example, is frequently treated as a secondary pathway rather than as a structured opportunity for knowledge retention and workforce sustainability.

Cultural barriers further complicate the picture. Institutionalised ageism continues to shape recruitment, promotion, and retention practices (Loretto et al., 2000). Without intentional efforts to transform organisational cultures, policy initiatives risk remaining superficial, failing to address the deeper biases that exclude older workers from meaningful professional participation.

Additional insights emerge from diversity management literature. While demographic diversity, including age diversity, can enhance organisational performance, these gains are not automatic. They require leadership commitment, inclusive practices, and an environment that genuinely values heterogeneous experiences (Post & Byron, 2015).

Collectively, these findings suggest that supporting the professional activity of older adults demands more than isolated initiatives or symbolic policy gestures. It calls for integrated strategies that connect individual capacities, organisational systems, and societal frameworks, fostering environments where ageing is not simply accommodated but actively leveraged as a source of innovation, resilience, and continuity (Truxillo et al., 2015). Table 1 reveals principal concepts

emerging in previous literature on supporting professional activities for older people.

**Table 1.** Key Concepts from Seminal Papers

Paper	Concept	Critical Insight
Ilmarinen (2001)	Work ability	Work ability is dynamic and shaped by lifelong organisational and social investments.
Taylor & Walker (1998)	Stereotypes and HR bias	Age bias persists even amid policy reforms, limiting access to meaningful employment.
Kooij et al. (2010)	Age-specific HRM, Workplace flexibility	Without differentiation, HR policies risk marginalising older workers' motivational needs. Flexibility is necessary but often insufficient without changes to organisational expectations and values.
Armstrong-Stassen (2008)	Post-retirement employment	Organisations undervalue the contribution of retirees without tailored engagement strategies.
Loretto et al. (2000)	Anti-ageism strategies	Structural ageism must be dismantled, not merely compensated through surface interventions.
Post & Byron (2015)	Organisational diversity	Diversity benefits depend critically on leadership practices and inclusive cultures.
Truxillo et al. (2015)	HRM frameworks for ageing	A holistic, proactive HRM approach is essential to counteract exclusionary dynamics in ageing workforces.

Source: Authors' elaboration.

## Materials and Methods

### Research Design

This study adopts an SLR to investigate how academic research addresses support for the professional activity of older adults. SLRs are particularly suitable

for synthesising knowledge in multidisciplinary and evolving domains, offering transparency, replicability, and the capacity to highlight research gaps. According to Massaro et al. (2016), the present research integrates bibliometric and thematic analysis to explore both the structural characteristics and conceptual dynamics of the literature.

Moreover, this study applies a hybrid methodology, which combines performance analysis, including publication trends, citation patterns, with conceptual structure mapping based on keyword co-occurrence (Sadraei et al., 2023; Secinaro et al., 2025). This approach enables a dual perspective: identifying influential sources and tracing thematic developments within the literature (De Bem Machado et al., 2022). The aim is not merely to summarise the existing body of work, but also to provide insights that support theoretical advancement and inform policy and organisational strategies related to age-inclusive employment.

### ***Data Selection***

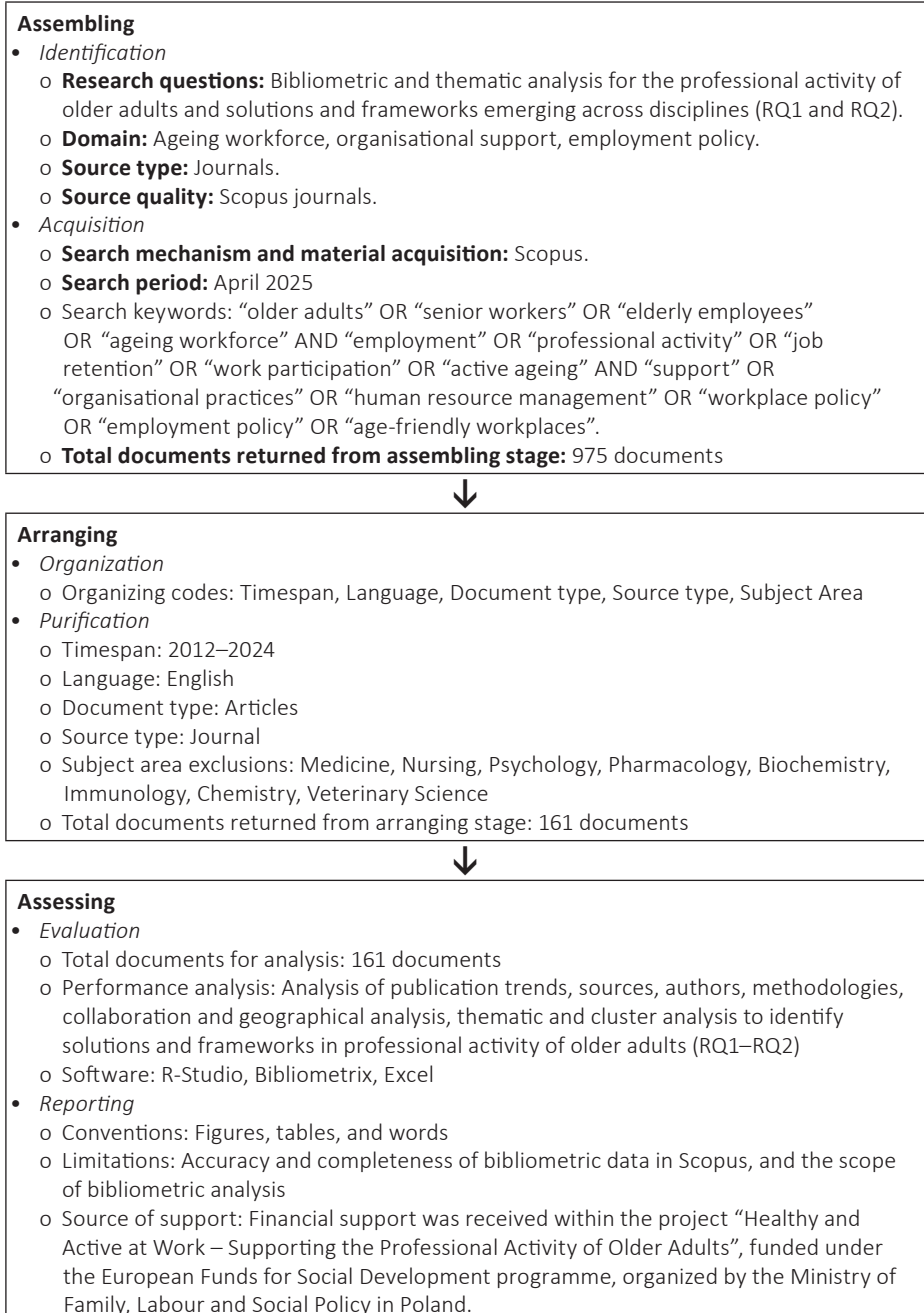
The Scopus database was selected as the sole source for data extraction due to its comprehensive coverage of peer-reviewed journals across relevant disciplines and its high compatibility with bibliometric tools. According to Okoli (2015), Scopus is a multidisciplinary resource that indexes a broader range of journals than Web of Science, making it particularly appropriate for research in management and social sciences. Its use ensures access to relevant and updated contributions, especially for studies focusing on organisational and policy dynamics. Furthermore, relying on Scopus is consistent with bibliometric best practices in business research, which seek to balance coverage, transparency, and analytical robustness (Zupic & Čater, 2015).

The construction of the search string was informed by a preliminary reading of key studies addressing age and employment (Rinsky-Halivni et al., 2022; Salomão Filho et al., 2023). These works helped identify relevant terminology and conceptual dimensions related to older workers, employment dynamics, and organisational or policy support.

The search string was constructed using Boolean logic and applied to the title, abstract and keywords fields. It was structured around three main thematic axes: the target population, the employment-related domain and the support mechanisms:

("older adults" OR "aging workforce" OR "senior workers" OR "elderly employees") AND ("employment" OR "professional activity" OR "job retention" OR "work participation" OR "workforce inclusion" OR "active aging") AND ("support" OR "organizational practices" OR "human resource management" OR "workplace policy" OR "employment policy" OR "age-friendly workplaces").

**Figure 1.** Procedure for review adopting the SPAR-4-SLR protocol.



Source: Authors’ elaboration based on Paul et al. (2021).

The time span was limited to 2012 to capture contemporary literature aligned with the “active ageing” paradigm institutionalised by the European Parliament (2012) European Commission. This marked a policy shift framing ageing not as a burden but as a resource in the labour market. Additional filters were applied to include only peer-reviewed journal articles (Biancone et al., 2022), published in English and in their final publication stage, ensuring thematic relevance and academic quality (Lanzalonga et al., 2023). After applying the initial inclusion criteria, a total of 632 papers were identified. This set was subsequently refined through manual screening, excluding documents not aligned with the analytical focus of the review, specifically those belonging to fields such as medicine, nursing, psychology, pharmacology, and related biomedical sciences. The final sample includes 161 papers in the field of management and social sciences.

To structure and report the review process, the study follows the SPAR-4-SLR framework (Paul et al., 2021). This model organises the SLR in three phases: assembling, arranging, and assessing. Its structured logic enhances the clarity, consistency, and transparency of the review. A visual representation of the SPAR-4-SLR structure as applied in this study is provided in Figure 1.

Analysis was conducted using the Bibliometrix R package, which supports both descriptive and conceptual bibliometric analysis (Aria & Cuccurullo, 2017). By combining bibliometric rigour with a structured review protocol, this methodology offers a robust foundation for understanding the development and orientation of the literature on age-inclusive employment support, while also providing a framework for future research agendas.

## Results

The bibliometric approach enables the exploration of the research questions while simultaneously mapping the core dimensions of the scientific domain (Secinaro et al., 2022). In this section, the descriptive characteristics of the selected corpus are presented through keyword analysis and publication metrics, offering insights into the structure of scientific production and supporting the

response to the first research question. Author-level metrics further contribute to this analysis. Thematic analysis is then introduced to address the second research question, identifying key concepts and recurring frameworks adopted by scholars in examining support for the professional activity of older adults. This thematic classification highlights emerging directions and opportunities for future research in the field of age-inclusive employment.

### ***Descriptive analysis***

The refined dataset includes 161 documents, published between 2012 and 2024, reflecting growing academic interest in the professional inclusion of older adults following the institutionalisation of the “active ageing” paradigm. The analysis of Table 2 shows that the sample comprises 109 peer-reviewed journal sources, with an annual growth rate of 20.81%, indicating a rising trend in scholarly output.

The documents have an average age of 4.35 years and receive 12.69 citations per document, suggesting a moderate impact across the field. A total of 8,727 references were captured, illustrating the breadth of the knowledge base.

The dataset includes 1,003 Keywords Plus and 573 Author Keywords, revealing a rich and diverse thematic landscape. 612 authors contributed to the literature, with only 14 single-authored documents.

**Table 2.** Sample characteristics

Description	Results
<i>Main Information about Data</i>	
Timespan	2012–2024
Sources (Journals, Books, etc)	109
Documents	161
Annual Growth Rate %	20,81
Document Average Age	4,35
Average citations per doc	12,69
References	8.727
<i>Document Contents</i>	
Keywords Plus (ID)	1003
Author's Keywords (DE)	573
<i>Authors</i>	
Authors	612
Authors of single-authored docs	14
<i>Authors Collaboration</i>	
Single-authored docs	14
Co-Authors per Doc	3,89
International co-authorships %	31,06
<i>Document Types</i>	
Article	161

Source: Authors' elaboration using Bibliometrix.

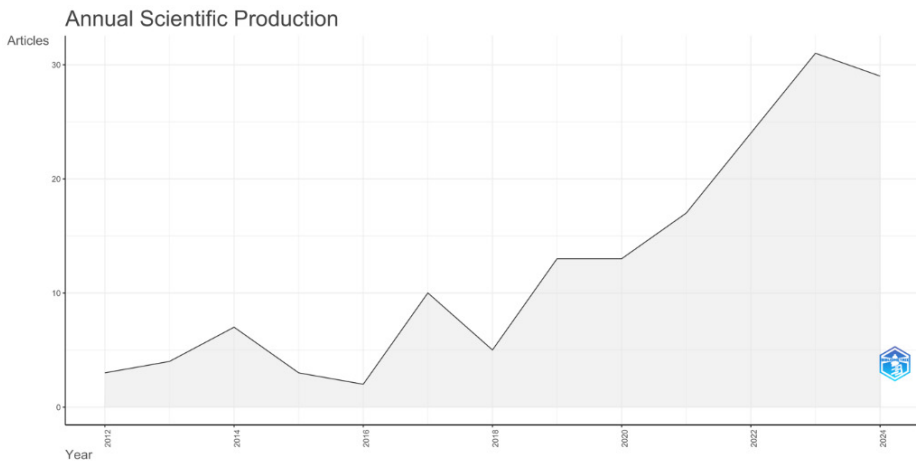
The average number of co-authors per document is 3.89, and 31.06% of the works involve international collaboration, confirming the global nature of the discourse.

All documents are classified as articles, confirming a focus on peer-reviewed academic outputs. These results highlight an active and collaborative research domain with increasing visibility, forming the basis for the performance and thematic analyses presented in the following sections.

As shown in Figure 2, the annual scientific production on the topic has followed a clear upward trajectory, with a notable increase from 2019 onwards. The number of publications peaked in 2023 with over 30 articles, reflecting

a growing academic interest in the professional inclusion of older adults. This trend is consistent with the increasing societal and policy focus on active ageing and extended working lives.

**Figure 2.** Topic development over the years.



Source: Authors' elaboration through Bibliometrix.

### **Source's analysis**

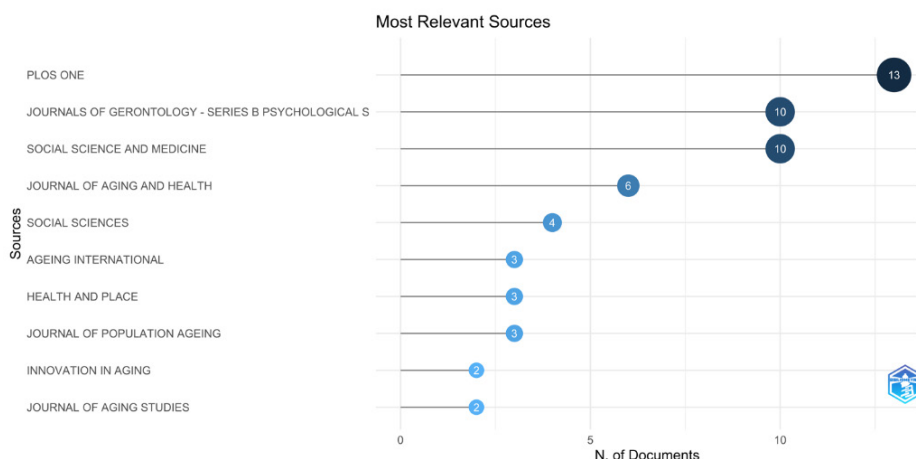
As shown in Figure 3, the most relevant sources contributing to the topic of support for the professional activity of older adults include a mix of interdisciplinary and health-oriented journals. PLOS ONE leads with 13 articles, followed by The Journals of Gerontology: Series B, Social Science & Medicine, and the Journal of Aging and Health, each contributing 10 or more publications.

Although some of these journals are traditionally associated with medical or health sciences, their scope clearly extends to social, psychological, and policy-oriented dimensions, justifying their inclusion in the thematic core of this review. For instance, PLOS ONE publishes research across disciplines, including public health, policy, and ageing in the workforce. The Journals of Gerontology: Series B explicitly focus on psychological and social aspects of ageing, particularly in relation to functioning in later life. Social Science & Medicine covers a broad

spectrum of societal health determinants, including labour participation and ageing. Similarly, the Journal of Aging and Health centres on the relationship between ageing and functional outcomes in social and institutional contexts, often including employment and retirement transitions.

These sources reflect the interdisciplinary nature of the topic, where health, work, and policy are deeply interconnected. Their prominence supports the idea that contributions to the discourse on ageing and professional inclusion often emerge from fields where medical and social research converge.

**Figure 3.** Ranking of journals by the number of publications



Source: Authors' elaboration through Bibliometrix.

## Author's analysis

As illustrated in Figure 4, the production of the most active authors within the dataset appears fragmented, with a few notable exceptions demonstrating consistency over time. Adam Evans stands out as the most prominent contributor, with two articles and the highest total citations per year. In the co-authored work, the author critically addresses the concept of active ageing from a design

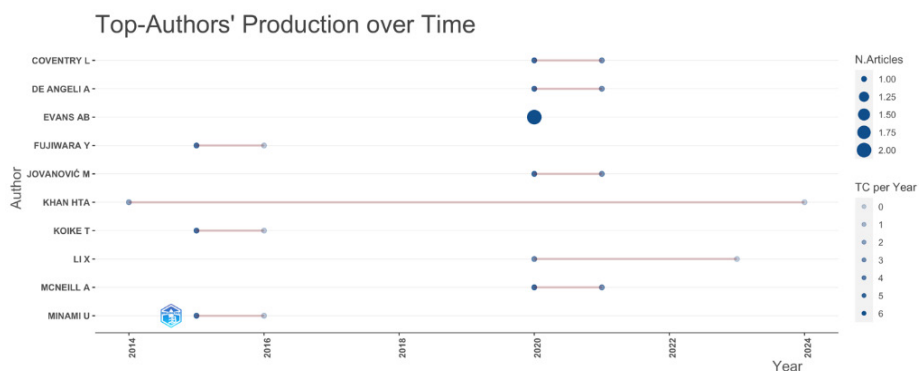
and technology perspective, positioning older adults as central actors in the development of inclusive digital environments (Evans & Nistrup, 2020; Gerling et al., 2020).

Authors such as Jovanović, Coventry, and De Angeli each appear with multiple contributions over consecutive years. Jovanović's work explores digital literacy and its impact on work and participation in later life (Jovanović et al., 2021), while Coventry and De Angeli focus on issues of trust, agency, and privacy in technological contexts involving older users (De Angeli et al., 2020). These authors reflect a growing strand of research that connects ageing with digital and organisational inclusion.

Meanwhile, Fujiwara, Koike and Minami contribute to the field with punctual but meaningful studies in psychosocial well-being and social participation, domains particularly relevant to the cultural and institutional structures that shape older adults' access to work and community life (Minami et al., 2015, 2016).

While the overall volume of individual author production is limited, the thematic contributions of these scholars point to a diversified and multidisciplinary landscape, where technological, psychological, and policy-oriented approaches converge to address the challenges and opportunities of an ageing workforce.

**Figure 4.** Authors' production over time and the number of papers



Source: Authors' elaboration through Bibliometrix.

## ***Geographical and collaboration analysis***

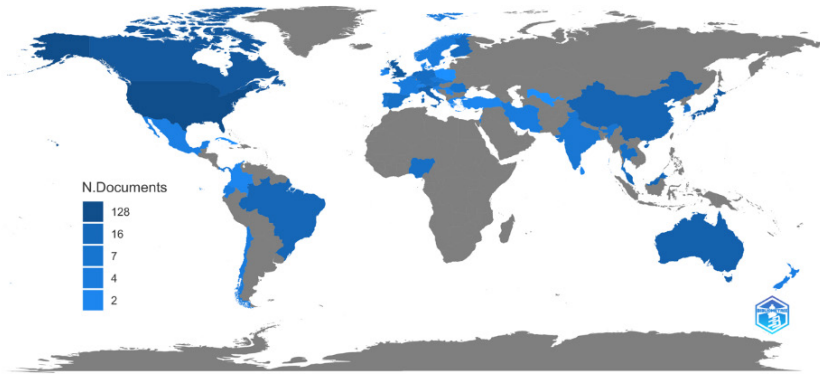
As shown in Figure 5, the scientific production on support for the professional activity of older adults is predominantly concentrated in high-income countries, particularly the United States, the United Kingdom, Australia, Canada, and several European nations. This pattern can be explained by the policy frameworks and demographic dynamics outlined in several articles within the dataset. For instance, multiple studies originating from Australia and the UK explicitly connect active ageing policies and public health agendas to initiatives promoting later-life employment and digital inclusion for older adults (Gerling et al., 2020; Jowsey et al., 2013).

The strong representation of Australian and UK-based research is further justified by the emphasis in these contexts on lifelong learning, digital literacy among seniors, and active ageing strategies embedded in national policies. According to Minami et al. (2016), national-level programmes, particularly in East Asia and Europe, have encouraged empirical studies addressing both psychosocial well-being and professional participation of older adults.

Conversely, there is a relative underrepresentation from low- and middle-income countries, despite some notable contributions from nations such as China and Singapore, where productive ageing and social participation are emerging policy priorities (Aw et al., 2017; Ko & Yeung, 2019).

**Figure 5.** Country map for production

## Country Scientific Production



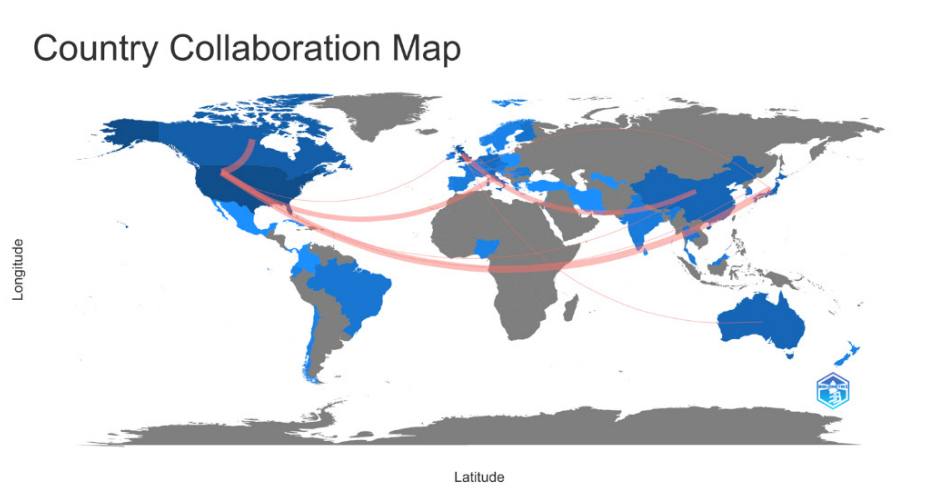
Source: Authors' elaboration through Bibliometrix.

As shown in Figure 6, international collaboration in the field of older adults' professional activity is led by a core group of countries, notably the United States, the United Kingdom, and Australia, which form consistent bilateral and multilateral research ties with European and Asian nations. These collaborations often reflect joint research initiatives, shared policy concerns regarding ageing populations, and the globalised nature of institutional responses to workforce ageing.

The map highlights particularly strong research links between the UK and Australia, as well as between the US and East Asian countries such as Japan, China, and Thailand. This corresponds with several studies in the corpus that emerged from multi-institutional or cross-national projects, often focused on digital inclusion (Weerasombat et al., 2024), workplace adaptation, or comparative policy frameworks (Minami et al., 2016).

In contrast, countries in Africa, Eastern Europe, and parts of Latin America show minimal or no collaboration lines, mirroring the earlier observation on the unequal geographical distribution of scientific production. The absence of structured collaboration from these regions may be linked to disparities in research funding, access to international academic networks, and differing policy priorities regarding ageing and employment.

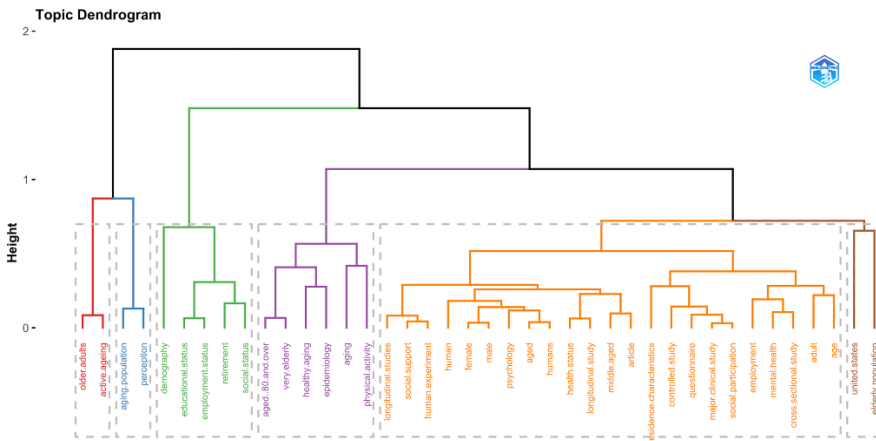
**Figure 6.** Country collaboration map



Source: Authors' elaboration through Bibliometrix.

## Thematic Analysis

This section presents the thematic structure emerging from the bibliometric clustering process. Five distinct clusters were identified (Figure 7), each capturing a core domain of research on ageing and professional activity through shared keywords, conceptual orientations, and methodological patterns.

**Figure 7.** Topic dendrogram via multidimensional scaling

Source: Authors' elaboration through Bibliometrix.

### **Active Ageing and the Construction of Autonomous Older Adults (Red Cluster)**

The Red Cluster revolves around the keywords “older adults” and “active ageing”, capturing a significant conceptual shift in how ageing is addressed across social, policy, and technological domains.

The core theme emerging from this cluster is the transition from deficit-based views of ageing towards asset-based approaches that stress autonomy, participation, and social engagement of older adults.

Gerling et al. (2020) critically assess how active ageing narratives influence the design of assistive technologies, arguing that many interventions risk reinforcing negative stereotypes about ageing rather than fostering genuine inclusivity. Moreover, other authors analyse public policy frameworks, showing how active ageing discourses often impose a moral obligation on older individuals to remain productive and self-reliant (Evans & Nistrup, 2020).

From another perspective, technological innovations can support the emotional and social well-being of older adults, suggesting that the active ageing

paradigm is evolving beyond its traditional focus on physical activity to incorporate digital inclusion and emotional resilience (Alzyoudi & Mazroui, 2024). This cluster illustrates a broadening of the active ageing concept, moving towards a multidimensional understanding that integrates health, technology, social participation, and psychological well-being.

### ***Perceptions and Social Responses to Population Ageing (Blue Cluster)***

This cluster focuses on how the ageing of populations is perceived at societal, institutional, and individual levels. The inclusion of the keywords “aging population” and “perception” suggests a thematic concern with how demographic change is framed and understood, particularly in relation to planning, inclusion, and public space.

One key theme in this cluster is the perceptual experience of ageing in the context of urban environments. According to Lau et al. (2021), older adults’ perceptions of safety, accessibility, and psychological comfort in urban green spaces significantly shape their engagement with public life, suggesting that age-friendly planning must integrate lived experience, not just physical design.

Other authors analyse ageing populations through the lens of intergenerational economic and workforce transitions. This study reveals how perceptions of demographic shifts are tied to concerns about economic dependency and labour market imbalance, which in turn influence policy approaches to older workers (Grenčíková et al., 2023).

This cluster reveals that perception is not a secondary issue, but a central factor influencing how societies respond to ageing demographics. In this perspective, “perception” appears not merely as a reflection of individual or collective opinions, but as an active process of constructing social reality – one that shapes which needs of older adults are recognised, which actions are legitimised, and which remain invisible or marginalised.

## ***Structural Determinants of Ageing: Education, Employment, and Social Status (Green Cluster)***

The green cluster centres on the socio-demographic determinants of the ageing process, such as demography, educational status, employment status, retirement, and social position, which are conceptualised as key factors influencing older adults' ability to participate in professional and social life. At the centre of this cluster are structural variables which shape individual ageing trajectories and determine access to resources and forms of support. The cluster highlights the importance of a life-course perspective in understanding how early-life inequalities influence later-life opportunities and resources.

Many studies in this cluster adopt the life-course framework to emphasise the cumulative nature of disadvantage. Minami et al. (2016), for instance, show that lower-educated individuals often remain in the labour market for financial reasons, indicating how education and social class relate to prolonged work. Burnay and Sanderson (2022) explore the Belgian context, where low participation of older workers is linked to institutional barriers and early retirement culture. Their research addresses employment status and structural factors that hinder prolonged professional activity, including issues related to education and social position. Wickrama et al. (2013) demonstrate that occupational status in later life correlates strongly with health and well-being, while Lasso and Frasser (2015) note that job quality for older workers remains low, underscoring inequalities tied to age and social position.

An important contribution within this cluster is offered by Ko and Yeung (2019), whose study of productive ageing in China shows that childhood conditions – such as family socioeconomic status and neighbourhood cohesion – have long-term effects on work and caregiving in later life. Their use of the pathway and latency models underscores the importance of biographical factors in shaping later-life inclusion.

Overall, the green cluster stresses that promoting active ageing requires policies that go beyond chronological age and consider the long-term impact of earlier educational, occupational, and social experiences.

### ***Rethinking Agency and Place in Later Life (Purple Cluster)***

The Purple Cluster explores the social and experiential dimensions of very old age, centred around the keywords “aged 80 and over”, “very elderly”, “healthy aging”, “aging”, and “physical activity”. Rather than focusing on medicalised interpretations, this body of literature interrogates how autonomy, agency, and place-making evolve in later stages of life.

Exploring the shifting meaning of independence for older adults in the context of weakening intergenerational support, reveal that older individuals are increasingly required to reconfigure their roles and expectations, often embracing self-reliance in response to changing family and community structures (Zhang & Cheng, 2024).

According to Motomura et al. (2024), the proximity to urban green spaces facilitates daily movement and engagement among older adults, framing physical activity not as an outcome of health behaviour, but as a relational practice embedded in place and routine. This perspective emphasises the importance of lived environment in sustaining functional autonomy, especially when formal supports are limited.

Therefore, growing interest in the lived experience of ageing beyond the age of 80, where health and participation are not just biological but entangled with everyday environments, social expectations, and material conditions. The cluster points to the need for more inclusive narratives and infrastructures that recognise the diversity of ageing paths in late life.

### ***Social Participation and the Emotional Politics of Ageing (Orange Cluster)***

The Orange Cluster reveals a multidimensional strand of literature concerned with how older adults navigate identity, participation, and emotional well-being in later life. The presence of keywords such as “social support”, “social participation”, “mental health”, “employment”, and “questionnaire” suggests a thematic fusion of empirical analysis and sociopsychological insight into ageing experiences.

A key focus within this cluster is the continuity of identity and meaning making through post-retirement employment and caregiving roles. Individuals

transitioning into “bridge employment” maintain a sense of purpose while managing age-related and structural constraints (Mazumdar et al., 2021). Similarly, other authors investigate how informal caregivers balance labour responsibilities and emotional strain, shedding light on how ageing individuals are embedded in broader relational economies (Longacre et al., 2017).

Another prominent dimension is the connection between social inclusion and mental health, that show that cultural engagement serves not only as entertainment, but also as a mechanism for preserving emotional well-being and cognitive stimulation in later life (Fancourt & Steptoe, 2019). In particular, loneliness and depressive symptoms among racialised older adults, framing social isolation as a structural issue shaped by intersecting inequalities (Taylor & Nguyen, 2020)

The present cluster provides interesting insights from a methodological point of view. The prevalence of terms like “longitudinal study”, “controlled study”, and “cross-sectional study” indicates a solid empirical foundation underpinning this body of work.

### ***Ageing Populations in different Context (Brown Cluster)***

The Brown Cluster groups together papers that conceptualise “elderly population” not simply as an age-based demographic, but as a socio-political construct shaped by policy environments, geographic contexts, and institutional narratives. The recurring presence of the term “United States” suggests that much of this literature either directly focuses on the U.S. case or implicitly treats it as a benchmark for comparison.

Karlin & Weil (2017) compare frameworks of healthy ageing across countries, revealing how American perspectives tend to emphasise individual responsibility, productivity, and health optimisation, reflecting broader neoliberal ideologies around ageing. This contrasts with more collectivist or rights-based approaches observed elsewhere.

A complementary angle explores how elderly populations perceive the age-friendliness of their environments across various European regions, exposing how U.S.-centred models of active ageing may not fully account for cultural or structural specificities elsewhere (Ivan et al., 2024).

Finally, other papers discuss that ageing in geographically and economically marginal contexts, showing how structural vulnerability is compounded by place-based exclusions, a theme highly relevant in U.S. discussions around ageing in rural or climate-affected areas (Sandra, 2017).

## Discussion

The complexity of supporting older adults in the labour market cannot be effectively addressed through isolated actions or one-dimensional theoretical approaches. As demonstrated in the preceding sections of this report, the academic literature offers a wide range of perspectives – from institutional and organisational frameworks to psychological and social approaches – providing theoretical models, empirical evidence, and practical recommendations. These perspectives reflect, on the one hand, the evolution and deepening of scholarly engagement with the issue of later-life labour market inclusion, and on the other, the considerable fragmentation of the field – both methodologically and institutionally. In light of this diversity of approaches and the inconsistency of practice, the need for integrated strategies becomes particularly urgent – strategies that connect individual, organisational, and systemic factors shaping professional activity in later life.

To respond to the research questions, this discussion section is structured in two parts: first, it examines how the reviewed literature aligns – or diverges – from the theoretical foundations outlined in the background (Section 5.1); second, it explores the range of policy, organisational, and managerial solutions proposed to sustain the professional inclusion of older workers (Section 5.2). Through this structure, the section aims to reconcile conceptual expectations with empirical findings and to assess the extent to which current approaches meet the challenges of an ageing workforce.

## ***Reconciling Theoretical Foundations with Empirical Trends***

The findings confirm and extend the conceptual tensions outlined in the background literature on support for the professional activity of older adults. According to Ilmarinen (2001), the notion of “work ability” remains a central, albeit evolving, reference point. While traditionally rooted in biomedical and ergonomic assessments, current research reveals a broadening of the concept to include psychological well-being, digital inclusion, and place-based autonomy (Motomura et al., 2024; Zhang & Cheng, 2024). This evolution is particularly visible in the Red and Purple Clusters, where ageing is framed not merely in terms of capacity loss, but as a process shaped by context, identity, and design.

The review also confirms the persistence of institutionalised stereotypes and cultural barriers (Taylor and Walker, 1998; Loretto et al., 2000). However, recent studies take a more nuanced approach, addressing how such stereotypes are embedded within specific policy narratives and technological solutions. Gerling et al. (2020) highlight how discourses of “active ageing” can reinforce expectations of productivity and independence, even as they seek to empower older adults. These findings complicate earlier calls for anti-ageist HRM strategies by revealing how empowerment narratives themselves can become exclusionary.

From an HRM perspective, the expected emphasis on flexible work arrangements and age-sensitive HR practices is only partially reflected in the dataset (Kooij et al., 2010). While flexibility and post-retirement employment appear as relevant topics in the Orange Cluster, many contributions focus instead on broader dynamics such as emotional well-being, social participation, and informal caregiving (Mazumdar et al., 2021; Longacre et al., 2017). This suggests a growing recognition that older workers’ professional activity is deeply entangled with family, community, and care structures, challenging the idea that organisational solutions alone can address the complexity of ageing in the workforce.

Moreover, while earlier literature advocates for a diversity-sensitive approach to inclusion (Post & Byron, 2015; Truxillo et al., 2015), the bibliometric analysis reveals limited integration between diversity management and ageing studies. Although some work incorporates intersectional considerations, there is a relative lack of

engagement with gender, migration, or class as compounding dimensions of exclusion. This gap points to a potential area for theoretical enrichment and suggests that the current literature may still be operating within siloed disciplinary boundaries.

The geographical patterns identified in the review further reinforce the findings of Armstrong-Stassen (2008), who emphasised the uneven implementation of age-inclusive strategies across contexts. The strong presence of North American, European, and Australian contributions confirms that most empirical insights derive from settings with established policy infrastructures and demographic urgency.

### ***Policy and Organisational Solutions for Supporting Older Workers***

Thematic findings highlight a range of strategies aimed at fostering the professional inclusion of older adults, though these vary in scope and coherence across contexts.

At the policy level, many studies (Red and Brown Clusters) refer to national and international frameworks such as “active ageing” or “productive ageing”. While European approaches tend to promote intergenerational solidarity, U.S.-based policies focus more on personal responsibility and activation (Karlin & Weil, 2017; Ivan et al., 2024). However, authors note that without practical tools, such as pension flexibility or accessible training, these narratives remain largely aspirational (Sandra, 2017).

Organisational strategies, particularly from the Orange Cluster, stress the importance of HR practices such as flexible hours, gradual retirement, and supportive work environments (Kooij et al., 2010; Mazumdar et al., 2021). Yet, these are often inconsistently applied and not well integrated into broader diversity frameworks (Armstrong-Stassen, 2008; Post & Byron, 2015).

Managerial approaches increasingly emphasise relational dynamics over formal processes. Leadership support, inclusive communication, and recognition of older workers’ roles in knowledge sharing are key to fostering sustained engagement (Gerling et al., 2020; Evans & Nistrup, 2020). Studies also underline how emotional and social factors shape participation, especially in caregiving or community contexts (Longacre et al., 2017).

Technology appears as both an enabler and a challenge. Digital tools can promote autonomy and inclusion, but only if designed with attention to trust, accessibility, and user experience (Alzyoudi & Mazroui, 2024; De Angeli et al., 2020).

Finally, place-based factors are emerging as central. Access to public transport, green areas, and age-friendly infrastructure can support continued participation in professional and voluntary roles (Motomura et al., 2024; Zhang & Cheng, 2024).

## Conclusion

This study set out to examine how academic research has addressed support for the professional activity of older adults, with the aim of mapping both bibliometric trends (RQ1) and strategic frameworks (RQ2) to enable age-inclusive employment. The issue gains salience from the demographic ageing of workforces and the paradigm shift formalised by the European Parliament's 2012 Resolution on "Active Ageing and Intergenerational Solidarity", which frames ageing as a resource. However, enduring stereotypes and inconsistent HR practices (Taylor & Walker, 1998; Kooij et al., 2010) underscore persistent tensions between inclusive discourse and practice.

To address this, this research adopted a SLR supported by bibliometric and co-occurrence analysis, a recognised method for clarifying fragmented and multidisciplinary domains (Zupic & Čater, 2015; Massaro et al., 2016). This dual approach allowed to identify dominant themes while uncovering gaps in integration across disciplines and practices.

From a theoretical point of view, the results reflect a clear shift from deficit-based to asset-based approaches to ageing (Gerling et al., 2020; Zhang & Cheng, 2024). While HRM theory has stressed flexible and differentiated practices (Kooij et al., 2010), most contributions concentrate on emotional well-being, informal caregiving, and participation beyond traditional employment, revealing a broader notion of "support" for older workers (Longacre et al., 2017; Mazumdar et al.,

2021). Critical perspectives highlight how activation policies, though framed as empowering, may reinforce expectations of productivity that marginalise more vulnerable ageing trajectories (Evans & Nistrup, 2020; Foster & Walker, 2015). Moreover, although diversity management offers tools to support inclusion (Post & Byron, 2015), intersectional factors remain largely underexplored.

From a practical point of view, active ageing frameworks vary widely: European models emphasise solidarity, while U.S. approaches often focus on individual responsibility (Karlin & Weil, 2017). Yet, without concrete tools, such as flexible pensions or accessible upskilling, these narratives risk superficiality (Sandra, 2017). Organisationally, fragmented HR strategies must evolve into systemic, inclusive models that value older workers as knowledge holders and contributors (Armstrong-Stassen, 2008; Truxillo et al., 2015). Technological tools also play a dual role, as enablers of autonomy, but only if aligned with accessibility and trust (De Angeli et al., 2020; Alzyoudi & Mazroui, 2024). Finally, place-based infrastructures, public transport, green spaces, age-friendly design, emerge as crucial to sustained professional and social engagement (Motomura et al., 2024).

This review offers three main contributions. First, it synthesises dispersed literature into a coherent thematic map. Second, it advances a multidimensional framework that spans individual, organisational, and spatial dimensions. Third, it identifies fragmentation and limited interdisciplinarity as barriers to more inclusive approaches.

Nonetheless, limitations remain. The review's language and database scope exclude non-English and grey literature. Future studies should widen the corpus to include practice-led and Global South perspectives. Second, while conceptually rich, many studies lack empirical validation. Longitudinal and intervention-based designs are needed. Third, the neglect of intersectionality signals the need for more nuanced, equity-focused frameworks. Finally, regional disparities in research call for increased attention to contexts where ageing and labour policy evolve under different structural pressures.

Ultimately, ensuring the professional inclusion of older adults requires rethinking work not as an endpoint but as a dynamic and relational process, shaped by organisational systems, societal narratives, and material infrastructures that either enable or constrain meaningful ageing trajectories.

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# Intellectual Capital as a Strategic Resource of German Public Libraries: Development Conditions, Managerial Implications, and Organizational Consequences

## ABSTRACT

**Objective:** The aim of this article is to analyze intellectual capital as a strategic resource of German public libraries, taking into account its development conditions, managerial implications, and organizational consequences. The article seeks to identify the factors influencing the development of intellectual capital within these institutions and to assess the extent to which this capital forms the basis for their adaptability, operational efficiency, and ability to fulfil their social mission in a changing institutional environment. The discussion is conducted in the context of the specific nature of libraries as non-profit organizations, highlighting the necessity of implementing a conscious and long-term strategy for managing intellectual capital. Particular attention is given to the role of library personnel, planning and recruitment processes, as well as the importance of organizational culture and internal communication in sustaining and enhancing the intellectual value of public libraries.

**Methodology:** This article is based on a critical analysis of the relevant literature and an in-depth interpretation of both domestic and international sources concerning intellectual capital management in non-profit institutions, with particular emphasis on public libraries in Germany. Strategic documents, institutional reports, and scholarly studies on management practices within the library sector were taken into account. The analysis is qualitative and exploratory in nature, aiming to identify key determinants in the development of intellectual capital and translate them into insights into the functioning and organizational effectiveness of public libraries. The research approach also incorporates elements of case study methodology, drawing on observations of institutional practices and the analysis of models implemented in selected entities within the German library system.

**Findings:** Intellectual capital is a crucial factor determining the effectiveness of German public libraries and their capacity to adapt to dynamic social and technological environments. The development of this resource requires systematic planning, alignment with the institution's strategic goals, and a coherent human resources policy. The most effective intellectual capital development strategies identified in the studied institutions are those that are long-term, quality-oriented, and tied to continuous staff education. Conscious and engaged leadership, along with a consistent focus on the development of competencies across the entire team – not just the management – is identified as a key success factor.

**Value Added:** The added value of this article lies in its comprehensive analysis of intellectual capital as a strategic resource of German public libraries, taking into account both developmental conditions and the practical aspects of managing this capital. The article provides new perspectives on the importance of long-term planning and deliberate personnel policy in libraries as non-profit organizations, identifying intellectual capital as a critical factor in ensuring organizational sustainability and institutional advantage. The study also includes specific recommendations for implementing intellectual capital development strategies, offering substantial support for management in enhancing public library performance.

**Recommendations:** It is recommended that German public libraries develop and implement long-term strategies for intellectual capital development, addressing the needs of various staff groups and adapting to changing organizational and societal conditions. Systematic investment in staff competencies, the development of interpersonal skills, and the promotion of an organizational culture that supports collaboration, innovation, and learning are of key importance. It is further recommended to integrate intellectual capital management with the institution's overall strategy, enabling more conscious and effective utilization of human potential as a strategic resource.

**Key words:** intellectual capital, public libraries, non-profit organizations, management strategy, employee competencies, organizational development

**JEL Codes:** D83, I23, J24, M12, L31

# Introduction

Public libraries in Germany are undergoing a significant transformation, driven by rising societal expectations, technological advancements, and changes in cultural and educational policy. Their role is no longer confined to providing information or education; it also encompasses fostering social capital, supporting social integration, and developing civic competencies. In light of this expanding mission, a resource that is difficult to define precisely yet indispensable to the functioning of these institutions, that is, intellectual capital – takes on critical importance (Gross-Gołacka, et al., 2021; Ujwary-Gil, 2010). It constitutes not only the foundation of libraries' operational effectiveness but also a condition for their strategic resilience and capacity for innovative development (Blankenburg, 2023). This article focuses on analyzing intellectual capital as a strategic resource within German public libraries. The analysis addresses both the internal structure of this capital (human, structural, and relational capital) and its functions in the context of fulfilling social and institutional responsibilities. Particular attention is paid to the conditions underpinning its development, the managerial mechanisms involved, and the resulting implications for organizational practices in libraries. The article aims to demonstrate how intellectual capital – understood as a set of intangible organizational resources – can be effectively shaped and leveraged by non-profit institutions operating in a complex social environment (Becker & Flicker, 2012). The research approach is based on a critical analysis of the literature, as well as an in-depth interpretation of strategic documents, institutional reports, and management practices in the library sector. The analysis is qualitative and exploratory, incorporating case study elements derived from observations of selected institutions within the German library system. Its goal is to identify the key determinants of intellectual capital development and to translate them into insights relevant to the sustainability and organizational effectiveness of public libraries (Friedl, 2002).

**Table 1.** Components of intellectual capital in public libraries

<b>Component of intellectual capital</b>	<b>Description</b>	<b>Examples of application in the library</b>
Human Capital	Knowledge, skills, experience, and engagement of library staff	Training programs, mentoring, professional development, and innovative service approaches
Structural Capital	Procedures, regulations, databases, information infrastructure, and knowledge management systems	Cataloguing systems, digital platforms, work instructions, and knowledge repositories
Relational Capital	Relationships with users, partner institutions, local communities, and external stakeholders	Collaboration with social organizations, programs for seniors and youth, participatory activities

Source: own elaboration.

The tripartite structure of intellectual capital – human, structural, and relational – constitutes the foundation of a systemic approach to managing the intangible potential of public libraries. Human capital, which underpins the quality of user services and the development of institutional offerings, requires continuous attention to staff education, motivation, and retention. Structural capital, on the other hand, ensures the stability and functionality of internal processes, thereby determining the operational efficiency of library units. Relational capital is particularly vital for libraries as open, community-oriented institutions – its development translates into increased trust, participation, and social integration. Recognizing the synergy among these three dimensions enables the deliberate formation of development strategies for intellectual capital as a strategic resource. The above framework establishes the theoretical and analytical foundation for examining intellectual capital in German public libraries, acknowledging this resource as a key component of institutional sustainability and social effectiveness. It is demonstrated that the redefinition of libraries’ roles toward institutions of knowledge and social integration necessitates a paradigm shift in management – from a focus on material resources toward a concentration on intangible assets, including knowledge, relationships, and management systems (Table 1).

The introduction organizes the problem structure by distinguishing the three dimensions of intellectual capital (human, structural, and relational)

and embedding them within the organizational context specific to non-profit institutions. It also highlights the need to develop appropriate management strategies in which staff and organizational culture are not merely carriers of operational competence but essential determinants of institutional success. The need to integrate human resource policies with the institution's mission and the importance of long-term, systemic planning for the development of intellectual capital is identified. This forms the foundation for the subsequent empirical and diagnostic analysis, allowing a transition from recognizing the importance of intellectual capital to assessing its developmental conditions, managerial implications, and social outcomes. Its key value lies in presenting intellectual capital not as an abstract concept but as an operational and measurable resource of strategic significance for the future of public libraries.

## Literature Review

Public libraries, as institutions deeply rooted in the local environment, are significant in the social and cultural infrastructure, actively participating in the processes of strengthening social, cultural, and symbolic capital. Their functioning extends far beyond the traditional framework of institutions providing knowledge – they currently constitute spaces of cooperation, social mediation, intergenerational transfer, and the building of institutional trust. In the German library system, characterized by a high level of decentralization and strong links with educational and social policy, public libraries carry out an expanded mission. This includes not only providing access to knowledge and information resources but also facilitating lifelong learning, counteracting informational, digital, and cultural exclusion, supporting intercultural integration, and preventing the marginalization of disadvantaged groups (Jungbluth, 2015). In this context, the library is perceived not merely as a service-oriented institution but as a complex social organization in which intangible resources – particularly the knowledge, competences, and engagement of employees; the quality of interpersonal relationships; established norms of cooperation; and organizational culture – form the primary

determinants of operational sustainability and adaptive capacity. These intangible assets constitute the core of a library's intellectual capital, conditioning its ability to respond to the complex needs of local communities and to adapt to dynamic external changes. As noted by Vogenschow (2020), learning organizations – of which next-generation public libraries may be considered a model – are characterized by their ability to mobilize resources of knowledge, reflection, and collective action, which translates into strategic resilience and institutional durability.

The development of intellectual capital in German public libraries is shaped by a complex set of dynamically evolving institutional, social, and technological conditions that define the operational framework of these institutions as entities of public trust. In the face of accelerating digitalization, the growing complexity of user needs, and the increasing multiculturalism of local communities, it becomes necessary not only to preserve intangible resources but also to actively shape, update, and reinvest them into new forms of knowledge and relationships (Blankenburg, 2023). Intellectual capital in libraries – understood as an integrated structure of human, structural, and relational capital – remains dependent on the systemic conditions in which the institution operates: from access to funding and educational-cultural policies, through the quality of institutional management, to the capacity for relationship-building and fostering social trust.

Human capital, encompassing the knowledge, skills, attitudes, and engagement of personnel, is particularly susceptible to the influence of recruitment systems, training strategies, and organizational culture. Its development requires sustainable mechanisms supporting lifelong learning as well as structural motivation for knowledge sharing (Korthals et. al., 2021). Structural capital – referring to procedures, systems, knowledge repositories, and information technologies – is dependent on the level of investment in infrastructure, the coherence of management systems, and the operational flexibility of the institution. Conversely, relational capital – based on trust, communication, and collaboration with the external environment – is particularly strongly influenced by external factors such as demographics, cultural diversity, and inclusive policies. The interaction among these components, their adaptability, and their capacity for integration within the organizational structure of the library determine its ability to achieve both social objectives (integration, inclusion, education) and operational

goals (efficient service delivery, program development, institutional stability) (Wojciechowska, 2021).

Among the fundamental institutional conditions influencing the development of intellectual capital in public libraries are the organizational structure of these institutions, the degree of their decision-making autonomy, the nature of adopted funding models, and the availability and quality of human resources. In the German public library system, which is deeply embedded within local government structures, there is considerable variation in organizational level and strategic management, which directly affects the capacity to develop and sustain intangible assets. Libraries operating under conditions of high autonomy, possessing separate budgets and strategic political support, are better positioned to effectively implement staff development programs, introduce innovative solutions, and plan investments in knowledge management infrastructure (Knoche, 2024). Conversely, units subject to stringent administrative control, burdened by bureaucratic procedures and financial constraints, face barriers in flexibly shaping personnel policies, initiating programmatic activities, and investing in structural development. Lack of access to flexible financing forms and a low standing within the hierarchy of local government institutions often lead to competency stagnation and curtailment of development initiatives (Wagner, 2017). Existing inequalities in institutional structure also result in discrepancies in libraries' capacity to accumulate and reproduce relational capital. Structurally weakened institutions less frequently establish enduring and partnership-based relationships with their local environment, which adversely affects their social legitimacy (Brandtner, 2013). At the same time, institutional stability – understood as the predictability of local government policies, coherence of internal regulations, and access to stable funding sources – creates favorable conditions for the accumulation of organizational knowledge, the development of a culture of collaboration, and the professionalization of staff. Only libraries rooted in long-term local development strategies and integrated within networks of local and regional partnerships are able to consistently develop their intellectual capital as a strategic and socially valuable resource. From this perspective, the ability of libraries to engage in dialogue with the institutional environment and to proactively participate in shaping

cultural and educational policy – as equal partners rather than mere executors of assigned tasks – acquires particular significance.

Another significant factor involves technological conditions. The processes of digitization, automation of information workflows, and the proliferation of online services are transforming not only the nature of library operations but also the competency requirements for staff. Digital transformation can strengthen structural capital through the development of knowledge management tools, databases, and communication systems; however, it simultaneously demands substantial investments in developing digital skills and adapting internal procedures to new standards (Dugall, 2015). Social conditions encompass demographic changes, increasing cultural and linguistic diversity of local communities, as well as the evolving expectations of users regarding the role of libraries in society. In this context, relational capital assumes particular importance, since the effectiveness of institutions largely depends on the quality of their interaction with the environment and their ability to initiate relationships based on trust, accessibility, and responsiveness. Consequently, library staff must possess not only appropriate subject-matter expertise but also communication and intercultural skills.

**Table 2.** Conditions influencing the development of intellectual capital

Type of Condition	Description of Influence	Recommended Actions
Institutional	Organizational structure, decision-making autonomy, and financial stability affect the capacity for strategic planning.	Strengthening strategic management and making long-term investments in intangible assets.
Technological	Advances in digitization and technological requirements necessitate updating competencies and reorganizing processes.	Continuous staff training and integration of digital tools with management practices.
Social	Demographic changes, cultural diversity, and user expectations condition the development of relational and intercultural competencies.	Intercultural competency development programs and active collaboration with communities.

Source: own elaboration.

The conditions influencing the development of intellectual capital generate a multidimensional structure in which three interrelated spheres have a dominant role: institutional, technological, and social. Each sphere constitutes not only an independent field of influence but also an element of a broader ecosystem for managing intangible assets of knowledge, relationships, and organizational culture. Effective management of intellectual capital in public libraries cannot be limited solely to internal human resources strategies; it requires a systemic approach that also takes into account the institutional environment, digital transformation processes, and the socio-demographic structures within which libraries are embedded (Bubel, 2017). The identification of key developmental barriers – such as low decision-making autonomy in certain units, infrastructural underinvestment, staffing shortages, and limited flexibility in adapting offerings to the needs of diverse local communities – also highlighted the potential for growth of intellectual capital. This potential arises, among other factors, from the increasing recognition of the role of libraries in integration policies, the development of information technologies, and opportunities to create networks of cooperation with social, educational, and cultural organizations (Wojciechowska, 2009). The conducted analysis demonstrates that only an approach based on the synergy of internal resources and external conditions can lead to the effective strengthening of libraries' potential as institutions of public trust. Table 2 enables a synthetic presentation of the relationships between different types of conditions and practical management actions, which should be implemented in an integrated, flexible manner oriented toward institutional sustainability. In particular, the importance of adapting institutional policies to the rapidly advancing technological and demographic changes is emphasized, as these redefine both societal expectations of libraries and their potential functions in the realms of integration, education, and innovation (Gołda & Łakomy-Chłosta, 2022). The necessity to integrate libraries into a multisectoral dialogue about the future of public services – especially regarding the shaping of social capital and civic competencies – emerges as a key challenge for policymakers and management staff.

Managing intellectual capital in public libraries requires transforming traditional organizational models toward reflective and learning structures in which

intangible assets – knowledge, experience, relationships, and values – form the foundation of institutional effectiveness and sustainability. Conventional administrative and clerical functions give way to tasks related to cultivating an organizational culture based on trust, communication, and continuous improvement (Sühl-Strohmenger & Tappenbeck, 2024).

One of the key managerial challenges is the integration of the institution's strategic objectives with human capital development policies. This entails the necessity to plan recruitment, onboarding, and professional development processes in a manner aligned with the library's mission and long-term goals. Only a coherent personnel policy – combining competency development, motivation, and staff retention – enables the building of organizational advantage within the non-profit sector, where financial remuneration rarely competes with the commercial market (Stefańska et al., 2019). Moreover, managing intellectual capital requires the development of organizational learning mechanisms that facilitate the flow of both formal knowledge (e.g., procedures, documentation, knowledge management systems) and informal knowledge (tacit knowledge, know-how, practical reflections). The role of management in this context is to create an environment conducive to knowledge sharing, mutual mentoring, and building trust within the team.

Another key managerial aspect in the context of intellectual capital development is the systematic strengthening of communication and leadership competencies among managerial staff. In conditions of increasing institutional complexity and dynamic changes in the social, political, and technological environment, public libraries require leaders capable not only of efficiently administering organizational structures but, above all, of inspiring teams, initiating innovative processes, managing knowledge, and resolving interpersonal and systemic conflicts (Bubel, 2016). The growing significance of the relational dimension of intellectual capital means that the leadership of library institutions must be equipped with competencies that enable the shaping of an organizational culture based on trust, shared responsibility, and openness to dialogue (El Emery et al., 2020). In this context, transformational leadership is particularly important, characterized by a lasting focus on values, institutional mission, and the development of human potential as the primary carrier of organizational quality. This type of leadership extends

beyond standard administrative functions, concentrating on creating meaning in action, strengthening cultural coherence within the organization, and inspiring personnel to engage in efforts beyond their basic duties (Hörtemöller & Nickisch, 2025). Transformational leaders do not merely manage resources – they act as architects of change who shape developmental visions based on long-term goals, while simultaneously embedding these visions in the institution’s daily practice. A key competence in this leadership model is the ability to motivate employees by appealing to higher values and shared organizational objectives. In the context of public libraries – as socially responsible institutions operating within a complex stakeholder environment – skillfully integrating teams around the educational and cultural mission, flexibly responding to changing community needs, and initiating innovative actions becomes particularly crucial (Jensen, 2022). Transformational leaders stimulate organizational development not through control but by strengthening responsibility, creativity, and the capacity for self-organization. This model finds particular application in public libraries, where a vital element of institutional identity is the ability to mediate between the demands of public policy and the evolving expectations of local communities. Libraries, as institutions of public trust, increasingly operate at the intersection of various interests: administrative, educational, civic, and cultural. In this context, transformational leadership proves not merely an optional management style, but a prerequisite for ensuring institutional continuity and the capacity for innovative transformation of the library’s role within the knowledge society.

By supporting the development of human capital – through inspiring, enhancing responsibility, and creating spaces for learning – transformational leaders simultaneously activate synergistic processes with the structural and relational components. As a result, the institution gains not only greater internal coherence but also increases its capacity to operate within a complex and multidimensional environment. Knowledge management, building relational networks, and maintaining high operational standards become possible only when leaders act not as supervisors but as integrators of developmental processes. Ultimately, it is the attitude, vision, and competencies of leaders that determine whether a public library will transcend routine service delivery and transform into an institution capable of conscious, long-term development.

Transformational leadership, grounded in trust, reflection, and mission, does not merely react to environmental changes but anticipates them, formulating new directions for development and mobilizing the team to jointly shape the organization's future (Schulz et al., 2021). In this way, it not only creates conditions for the development of intellectual capital but also strengthens institutional resilience, readiness for innovation, and the ability to generate lasting public value. This is why this leadership model finds justification in organizations – such as public libraries – that perform not only service functions but also cultural and civic roles. In non-profit organizations like public libraries, which combine service, educational, and integrative functions, the ability to lead in a transformative way gains particular importance. It becomes a decisive factor for internal cohesion, readiness to implement innovations, and effectiveness in achieving social objectives. The development of this type of leadership requires not only the individual predispositions of leaders but also systemic support in the form of training, mentoring, and an organizational culture conducive to knowledge exchange and learning.

An indispensable element of effective intellectual capital management in public libraries is the ability to conduct strategic assessment and multi-level evaluation. Managing this resource cannot rely solely on intuition or general declarations; it requires the application of formalized analytical tools that enable systematic monitoring of changes in the capital structure and measurement of development outcomes. Of key importance is the development of diverse evaluation indicators covering both the individual level (e.g., employee competency growth, engagement, pro-innovation attitudes) and the organizational level (e.g., efficiency of procedures, quality of stakeholder relationships, durability and currency of knowledge management systems) (Kirchhoff-Kestel, 2012). The process of measuring intellectual capital should not only focus on assessing its current state but also serve as a tool for forecasting directions and opportunities for further organizational development. This is particularly relevant for institutions operating in conditions of heightened social and political environmental volatility, such as public libraries, which must adapt their activities to new forms of civic participation, dynamic educational needs, and rapidly advancing digital transformation. Under such conditions, regular and

systematic diagnosis of intangible resources – including employee competencies, quality of external relations, and internal system functioning – ceases to be merely an analytical tool and becomes a crucial component of strategic management. The ability to measure and interpret intellectual capital resources allows libraries not only to retrospectively evaluate the effectiveness of implemented personnel policies, educational strategies, and innovation initiatives but also to proactively identify organizational weaknesses. This analysis facilitates the recognition of untapped knowledge potential, informational asymmetries, competency gaps, and procedural bottlenecks, thereby enabling corrective actions and enhancing organizational coherence (Blankenburg, 2023). Thanks to such mechanisms, intellectual capital management becomes an iterative process embodied in everyday managerial practice rather than a one-time evaluative operation.

In the long-term perspective, the ability to systematically monitor intangible resources determines whether a public library can maintain its current level of service or transcend operational routine to become an organization capable of generating sustainable social, institutional, and cultural value. This capability entails not only the continuity of evaluation processes but also the competence to transform data into strategic knowledge, which is then utilized in managerial decision-making, resource optimization, and the design of adaptive operational models. Ultimately, it is not the scale of material resources but the quality of reflective intellectual capital management that differentiates static organizations from those that are deeply embedded in the development of local communities and public spaces. The capacity for accurate and in-depth evaluation of intellectual capital also fosters the systemic cultivation of an organizational culture grounded in learning, responsibility, and transparency. Evaluation – understood not as a one-time audit but as a continuous process of recognizing an organization's potential and limitations – becomes a tool that strengthens internal cohesion and enhances the ability to adaptively respond to changing environmental conditions. In this framework, evaluation ceases to be a mere technical control procedure and transforms into a mechanism supporting institutional self-reflection, enabling management to make decisions rooted in up-to-date data and oriented toward long-term objectives.

The library as a learning organization ceases to be a passive recipient of external impulses for change and becomes an active co-creator of these processes. In the context of a dynamically changing social and technological environment, the institution's ability to generate knowledge from its own practice and subsequently interpret it in strategic terms constitutes a key condition for both survival and development. Using the measurement of intellectual capital as an analytical and decision-making tool enables the library not only to improve operational structures and management processes but also to formulate conscious and targeted development policies aimed at building lasting public and cultural value. Conscious management of intellectual capital in public libraries generates multifaceted organizational consequences that extend beyond mere operational efficiency. It involves a profound redefinition of functions, structures, and institutional relationships. This process requires a shift from the traditional management paradigm focused on control and stability to a flexible, reflective, and developmental model. In this context, the library as a learning organization must undergo significant internal transformations: strengthening participatory mechanisms, reorganizing decision-making systems, and integrating human resources policies with strategic goals of a social and cultural nature.

One of the key organizational consequences is the transition from a functional structure to a network structure, where the flow of knowledge, competencies, and responsibilities occurs horizontally (Seefeldt, 2015). In such a model, cross-team collaboration, communication transparency, and the ability to create interdisciplinary development projects have a central role. This change requires not only modifications of formal procedures but, above all, a transformation of organizational culture – so that it supports experimentation, knowledge sharing, and acceptance of risk as an indispensable element of innovation.

The development of intellectual capital in public libraries is systemic in nature and translates not only into the efficiency of the organization's functioning but also into its social legitimacy, visibility in the public space, and ability to generate shared value. The quality and dynamics of intangible organizational resources – such as knowledge, relationships, and cultural norms – directly influence the perception of the library as an open, responsible, and integrative institution (Becker & Flicker, 2012). From a social perspective, the library's

intellectual capital functions not only as an internal resource but also as an active mechanism supporting the building of institutional trust, the consolidation of local community identity, and counteracting various forms of exclusion – informational, educational, cultural, and digital. As an open and public institution, the library becomes a space of accessibility, dialogue, and participation, and its social impact increasingly depends not on the size of its collections but on the quality of relationships created with users and the ability to respond to the diverse needs of groups at risk of marginalization. In this context, a special role is attributed to library staff, who no longer perform solely traditional service functions but increasingly become educators, advisors, and mediators in social and intercultural relations (Berghaus-Sprengel & Söllner, 2022). Their task is not only to provide information or manage resources but primarily to create an inclusive environment that encourages active citizen participation in public, cultural, and educational life. In this understanding, the role of librarians requires not only professional knowledge but, above all, well-developed soft skills – interpersonal, communicative, intercultural – which become crucial when working with users from diverse social, linguistic, and cultural backgrounds.

Librarians, positioned at the intersection of the institution and the community, take on the role of “cultural translators” and moderators of social interactions. Their activities not only support the integration of groups at risk of exclusion but also foster the creation of spaces for dialogue, co-presence, and symbolic belonging. In the context of increasing cultural diversity and social challenges, the library becomes an institution where employees’ soft skills – including empathy, mediation ability, and cultural awareness – gain the status of strategic organizational resources. The level of social inclusion of users and the durability of trust-based relationships largely depend on the quality of interpersonal contacts cultivated in everyday library practice, as well as on librarians’ ability to recognize, understand, and respect the complex, individualized needs of those using the institution’s resources and services. Crucial here are communication, empathy, and intercultural competencies, which enable staff not only to provide services but also to serve as companions in the process of social and cultural participation. However, the effectiveness of this work cannot rely solely

on personal initiative or individual ethos – it requires systemic embedding within an organizational culture that promotes shared responsibility, knowledge sharing, and the building of relationships based on mutual respect and trust.

As Flämig et al. aptly observe (2023), the development of relational and human capital in public sector institutions, including libraries, cannot take place in an organizational vacuum nor be left solely to individual initiative. This process is closely linked to the existence of durable, multi-layered support structures: clear training strategies, integrated mentoring systems, self-assessment tools for competencies, and formal institutional mechanisms promoting inclusion, diversity, and openness. These elements create an organizational environment where human capital can not only be developed but also effectively utilized to fulfil the social mission. It is precisely within this institutional framework that attitudes conducive to active social inclusion and the building of long-term, partnership-based, and empowered relationships are rooted. The librarian – liberated from the reductionist role of an information service operator – becomes a moderator of social relations, a cultural guide, and an initiator of processes of symbolic transformation. Their role is not limited to providing access to resources but involves supporting communities in developing competencies related to participation, co-responsibility, and civic self-awareness. The quality of this relationship is not a random variable or dependent on external, circumstantial conditions; it is the result of a consciously shaped work environment where professionalization goes hand in hand with a public service ethos, and management and operational relationships are based on trust, participation, and recognition of diversity. In such a model, management processes do not neutralize social bonds through bureaucratization; on the contrary, they actively support them, making the library organization a structure founded on relational capital and internalized responsibility. Consequently, the library emerges as an institution capable not only of providing informational services but also of genuinely co-creating the social fabric of the local community – through durable, intentional, and culturally embedded relationships, grounded in intellectual capital understood not technically but axiology-wise. It is precisely the infrastructure supporting the development of intellectual capital – understood not as an abstract construct

but as a dynamic network of relationships, competencies, and values – that becomes the foundation of the long-term effectiveness of the library as a democratic and inclusive institution.

As a result, it is not only individual competencies but the overall organizational climate – based on transparency, dialogue, and learning – that becomes the condition for the library's effective fulfilment of its social function. Only in such an environment is a lasting transformation of the institution toward a participatory and democratizing model possible in which intellectual capital is not an internal resource but a social potential developed through action. Only then does the role of the librarian gain not only an operational dimension but also an axiological one – as an agent shaping the social fabric and supporting long-term processes of democratization of knowledge, culture, and interpersonal relations. Thus, library staff become not only implementers of social policies but also co-creators of local social and symbolic capital. Their role takes on a strategic dimension, especially in the context of culturally diverse societies, where the library ceases to be merely a place for access to information and becomes a space of active coexistence and negotiation of shared meanings. The effectiveness of these efforts does not depend solely on personal predispositions but on being embedded in a stable and reflectively managed organizational system that supports the development of soft skills, promotes the ethos of public service, and unites employees around the values of inclusion, equality, and cultural openness. It is precisely from this perspective that intellectual capital takes on a social dimension – it becomes a tool of change that transcends organizational boundaries and impacts the quality of citizens' lives as well as the durability of community bonds. At the organizational level, intellectual capital shapes how the institution's mission and goals are formulated, influences the structure of undertaken activities, and intensifies innovation processes. An institution with a high level of human and relational capital is capable not only of efficiently delivering services but also of designing developmental activities: educational, participatory, and community-engaging. The organizational culture also shifts – from a culture of control and hierarchy to a culture of dialogue, collaboration, and collective learning (Krebber & Hitschfeld, 2021).

## Research Methodology

The study is based on a qualitative approach and has an exploratory-diagnostic character embedded in the interpretative research paradigm. Its primary aim is to identify and interpret the factors determining the development of intellectual capital in German public libraries and to present the relationships between human, structural, and relational capital within the context of non-profit organizational practice. The research material consisted of:

- strategic documents and institutional reports, including the cyclical reports of the Deutscher Bibliotheksverband (Deutscher Bibliotheksverband, 2018–2023), which define development priorities and highlight key challenges for German public libraries,
- scholarly studies and empirical research on intellectual capital management in non-profit organizations,
- comparative publications concerning German libraries and other European systems,
- internal and reporting materials from selected libraries, such as organizational statutes, staff development plans, and annual reports.

This diverse selection allowed for the inclusion of both the strategic-institutional perspective and the everyday practices of management. The analysis encompassed documents and studies from the period 2013-2024, which made it possible to:

- capture changes occurring before and after the Covid-19 pandemic,
- identify accelerated processes of digitalization and their impact on the structural and intellectual dimensions of human capital,
- trace long-term trends in the mission and vision of German public libraries.

A set of qualitative methods was employed in the research process. Critical literature analysis was conducted with the aim of identifying theoretical models of intellectual capital management and comparing approaches applied in different contexts (public sector, non-profit organizations, academic and public libraries).

Content analysis of strategic documents and reports was carried out by mapping institutional priorities, developmental objectives, and performance indicators, and then relating them to the dimensions of intellectual capital: human, structural, and relational.

The case study of selected German public libraries included the examination of implemented solutions in the areas of human resources policy, recruitment and training programs, community engagement initiatives, and digitalization projects. The study adopted a multi-faceted perspective, focusing on a comparison of diverse models of intellectual capital management without attempting to homogenize them. Another applied research method was the triangulation of sources and interpretations, through the juxtaposition of literature, documents, and institutional data, with the aim of capturing both areas of convergence and divergence in intellectual capital management practices.

The research process concentrated on the selection of materials according to three criteria: timeliness (2013-2024), thematic relevance (intellectual capital management, public libraries, non-profit institutions), and source reliability. Thematic coding was applied by categorizing content from documents and publications into the three dimensions of intellectual capital. Comparative analysis of practices in selected libraries enabled the identification of similarities and differences in institutional approaches, and the synthesis of findings from individual stages in the form of a dependency map illustrating relationships between institutional, social, and technological factors.

A key assumption of the study was to move away from the search for a single common denominator. The objective was not to propose a universal model but rather to demonstrate the diversity of factor combinations influencing the development of intellectual capital. The adopted methodology thus enables a multi-level examination of the issue, ranging from theoretical models through strategic documents to the practical experiences of individual institutions.

The analysis of sources is intended to yield both theoretical insights concerning the development of the concept of intellectual capital in non-profit organizations and practical conclusions that may serve as recommendations for the management of public libraries in Germany.

## Intellectual capital in institutional practice: a document analysis and case study

The conducted analysis encompasses key strategic documents and institutional reports that outline the development trajectories of the German public library system and define the assumptions underpinning cultural and educational policy. Among the most significant are the *Bibliotheksentwicklungsplan 2025* developed by Bibliothek & Information Deutschland (Erwachsenenbildungsforum Oberösterreich, 2021), reports by the Deutscher Bibliotheksverband (Deutscher Bibliotheksverband, 2021), and regional strategies such as the *Fachinformationen der Fachstelle für Öffentliche Bibliotheken NRW* (Fachstelle Öffentliche Bibliotheken NRW, 2023). These documents consistently emphasize the importance of intangible organizational resources, including staff competencies, the sustainability of external relations, and institutional capacity for adaptive change management. Particular attention is drawn to the alignment between organizational goals and the needs of local communities, as well as the identified necessity for developing innovative managerial practices in response to the social and technological challenges of the twenty-first century. The role of libraries is notably underscored as spaces for social integration, educational support, and the mitigation of information exclusion. Content analysis of these documents reveals a conceptualization of the library as a strategic and mission-driven institution, wherein intellectual capital – understood as a system of interrelated competencies, values, and relationships – constitutes the foundation of effective and sustainable operations (Deutscher Bibliotheksverband, 2021; Erwachsenenbildungsforum Oberösterreich, 2021).

The analysis also incorporated a case study component, focusing on selected library institutions operating within the German public system. The subjects of observation included Stadtbibliothek Köln, Zentral- und Landesbibliothek Berlin, and Stadtbibliothek Bremen – libraries widely regarded as among the most dynamic and institutionally advanced in the country. The selection criteria extended beyond operational scale to encompass a high degree of organizational innovation, the application of contemporary knowledge management solutions, and a consistent policy of supporting staff competency development. Particular

attention was paid to initiatives aimed at systematically strengthening organizational culture, developing information management structures, and fostering partnership-based relationships with local communities and external stakeholders. The data collected provided detailed insights into the operational logic of these institutions, revealing both their strengths and areas in need of further optimization. The case study also offered an empirical foundation for identifying best practices that may be replicable in other public libraries across Germany (Stadtbibliothek Köln, 2023).

A common denominator across the analyzed institutions proved to be the presence of a coherent and consistently implemented organizational vision, which integrates the development of human and relational capital with the overarching strategic objectives of the institution. A central element of this vision is the conviction that staff development and the cultivation of external networks are not supplementary to library operations but rather constitute their core foundation. Notable observations included the existence of extensive mentoring systems, regular competency-based training programs, and advanced tools for self-assessment and internal evaluation – tools designed not only to measure effectiveness but also to inform future development planning. Of particular significance was the openness to external partnerships – both inter-institutional and cross-sectoral – involving collaboration with educational institutions, non-governmental organizations, cultural bodies, and municipal structures. Such cooperative efforts contributed not only to the expansion and accessibility of library services but also to the deepening of libraries' embeddedness within local community structures. The case study thus confirmed that the development of intellectual capital in public libraries requires more than managerial vision alone; it also necessitates well-designed support structures, a coherent institutional policy, and an organizational culture oriented toward continuous development, shared responsibility, and participatory practices. It is precisely this synergistic combination of factors that determines the institutional resilience of public libraries and their capacity to act as social integrators amid an increasingly complex and unpredictable environment (Deutscher Bibliotheksverband, 2021; Freie Hansestadt Bremen, 2023).

The analysis of intellectual capital in German public libraries highlights its critical importance to the contemporary operational model of cultural and educational institutions. In an era marked by increasing environmental complexity, financial resource volatility, and growing societal expectations, intangible assets – such as knowledge, competencies, values, and relationships – emerge as the foundation not only of operational efficiency but also of the long-term legitimacy of public institutions. Intellectual capital, as a resource that is difficult to replicate and deeply embedded within the organizational context, enables libraries not only to maintain continuity of service but also to be active in shaping local knowledge communities.

## Discussion

The intellectual capital of public libraries consists of three interrelated components: human capital (the competences, experience, and attitudes of staff), structural capital (procedures, systems, knowledge bases, and informational infrastructure), and relational capital (relations with users, partner institutions, and local communities). Their synergistic interaction determines the institution's ability to adapt under conditions of uncertainty and to fulfill its educational and cultural mission. The specificity of public libraries as non-profit organizations further intensifies the importance of intangible resources. Limited external funding opportunities, the absence of profit orientation, and high expectations from local communities mean that the institution's effectiveness largely depends on the quality of its internal organizational potential. In this light, intellectual capital becomes not only a functional resource but also a foundation of social legitimacy and an instrument for building trust in public institutions.

In the context of German public libraries, particular importance is attached to the relational component, which is reflected in partnership-based forms of cooperation with social institutions, schools, non-governmental organizations, and representatives of minority groups. Strengthening this dimension of intellectual capital supports processes of social inclusion and the building of

institutional trust. At the same time, maintaining a high level of human capital requires a consistent training policy, incentives for professional development, and working conditions that foster creativity and engagement. Libraries thus function as learning organizations in which intellectual capital not only shapes current activities but also forms the basis of their future capacity to generate public value. Well-designed strategies for managing this capital have the potential to contribute to the long-term strengthening of the libraries' position within the sphere of public services and to the development of local communities.

Public libraries as natural environments for the development of intellectual capital highlight their multidimensional role in the knowledge society. The analysis presented confirms that the institutional strength of libraries does not stem from material or infrastructural resources, but from human and relational potential embedded in coherent organizational structures. Intellectual capital serves to integrate various aspects of library operations – from operational to normative – and significantly influences their ability to respond to changing social needs. Conditions that support its development have also been identified, particularly in the context of non-profit institutions. Special emphasis is placed on the importance of relationships with the external environment and organizational culture as factors that enable the lasting embedding of intangible capital within the organizational framework. This provides the foundation for the next part of the study, which analyzes the determinants of intellectual capital development, management implications, as well as the social and organizational consequences of its deliberate shaping.

In conditions of unstable funding and growing social expectations, libraries must operate in a hybrid mode – combining internal resources with the potential of external partners. This kind of institutional relationality becomes the foundation not only for relational capital but also for systemic resilience: enabling rapid response to changes, joint value creation, and the development of innovative public services. Finally, one of the most significant organizational effects of managing intellectual capital is the transformation of the very concept of efficiency. Instead of classic quantitative indicators (e.g., number of loans or users), increasing importance is given to qualitative and strategic measures – such as the level of employee engagement, durability of relationships with the

environment, capacity to generate knowledge, and the social impact of conducted activities. This shift in perspective forces a revision of evaluation systems, redefinition of operational goals, and adaptation of management models to the logic of development based on intangible resources. In this approach, evaluation loses its traditional, audit-like character and becomes a tool of organizational self-awareness – a dynamic process of institutional reflection that does not end with the diagnosis but opens space for planning, change, and creative adaptation. As a catalyst for development, the measurement of intellectual capital enables the library to move beyond a reactive logic toward the environment and enter a phase of active, intentional shaping of its own identity, functions, and place in the knowledge society. It is precisely this dimension that makes the library not only a public utility institution but a truly strategic organization.

Intellectual capital, as an internal axis of strategic management in public libraries, redefines the role of managerial staff from operational managers to knowledge leaders and agents of organizational transformation. The effectiveness of the institution depends not only on formal structures and procedures but decisively on the quality of relationships, organizational culture, and the ability to manage tacit knowledge. The process of shaping and consolidating intellectual capital must be embedded in the overall institutional strategy, encompassing coherent actions in recruitment, training, leadership, and change management. A key challenge for public libraries remains the implementation of mechanisms for evaluating intangible assets, which requires both technical competencies and a culture of reflection. The above content introduces an organizational perspective on managing intellectual capital, representing a crucial stage in the transition from identifying intangible resources to their practical utilization in designing modern models of library functioning.

A high level of relational capital enables public libraries to serve as intermediary institutions between the individual and the system – integrating the efforts of local government, NGOs, and local communities. Structural capital – in the form of information systems, procedures, and digital resources – supports the durability and transparency of activities, and its integration with knowledge and relationships makes the library a learning, resilient, and proactive organization.

**Table 3.** The impact of intellectual capital on public value

<b>Dimension of Intellectual Capital</b>	<b>Internal Effects (Organizational)</b>	<b>External Effects (Social)</b>
Human Capital	Increased operational efficiency, better service quality, greater organizational flexibility	Better adaptation of offerings to social needs, development of user competencies
Structural Capital	Process standardization, easier access to knowledge, improved management	Increased accessibility of knowledge, transparency of institutional actions
Relational Capital	Better communication, higher level of internal cooperation, employee loyalty	Increased public trust, social integration, local partnerships

Source: own elaboration.

The above content demonstrates that intellectual capital in public libraries is not merely a resource supporting their internal operations but becomes a factor generating public value – measured by the level of social integration, access to knowledge, and the capacity to include and build community. The effectiveness of libraries is thus expressed not only through organizational efficiency but also through the strength of their social impact. The analysis emphasizes the significance of the synergy between the three dimensions of intellectual capital – human, structural, and relational – as the foundation for the institution’s durability and adaptability. The presented effects are divided into internal and external categories, allowing an objective assessment of the impact of intangible capital on various levels of library functioning. This serves as a basis for concluding that intellectual capital must be treated as a key element of the management strategy for public institutions, especially in the culture and education sectors. It also highlights the need to design tools for evaluating public value based on qualitative and relational variables (Table 3).

The social dimension of intellectual capital in public libraries constitutes a key element of their institutional identity and their integrative function within the local community. The analysis shows that the relational and human components – anchored in a stable organizational system – determine not only the quality of services provided but also the extent of social inclusion, the level of trust in public institutions, and the durability of community bonds. In this

perspective, the library functions as a space for encounter and dialogue, and the librarian acts as an agent of social change who not only transfers knowledge but also co-creates conditions for cultural participation and civic agency. It is identified that the effectiveness of the library's social functions depends on the conscious embedding of staff competencies within organizational structures that support training policies, mentoring systems, evaluation tools, and management practices oriented toward inclusion, participation, and openness. Institutionalizing these elements enables the lasting anchoring of relational practices in the library's daily operations. At the same time, it is demonstrated that the social potential of intellectual capital does not arise merely from the number of interactions but from their quality – defined by the level of trust, partnership in relationships, and their sustainability over time. The ability to recognize user needs, mediate intercultural relations, and support informational agency forms the foundation for a modern library model as an institution that democratizes public space and fosters social cohesion. Thus, intellectual capital – understood in its social dimension – ceases to be solely an internal organizational resource and becomes a tool for the systemic co-creation of community. Its development should be treated as a priority investment for public institutions, one that not only strengthens their operational resilience but also redefines their role within the knowledge society and civic culture.

## Conclusion

The analysis of intellectual capital in German public libraries clearly demonstrates its pivotal role in shaping the contemporary model of cultural and educational institutions. In the context of growing environmental complexity, financial instability, and rising societal expectations, intangible resources – such as knowledge, competencies, values, and relationships – have become the cornerstone not only of operational efficiency but also of the long-term legitimacy of public institutions. Intellectual capital, as a resource that is difficult to replicate and deeply embedded within the organizational context, enables libraries not only to maintain

continuity of service but also to actively contribute to the development of local knowledge communities. Understood as a dynamic configuration of knowledge, competencies, relationships, and values embedded within organizational structures, intellectual capital not only facilitates the fulfilment of libraries' core mission but also conditions their capacity for adaptation, innovation, and the creation of long-term public value. It represents a strategic resource of which development requires a deliberate and integrated approach: one that combines a strategic perspective with a developmental orientation, supports a coherent organizational culture, and ensures the full engagement of all levels of the institutional structure – from senior management to operational staff. Only under such conditions is it possible to sustainably strengthen organizational capacity and respond effectively to changing external conditions.

The findings of the analysis indicate that the development of intellectual capital should be understood as a systemic and iterative process, grounded in long-term planning and participatory mechanisms. Of particular importance are policies that support the enhancement of communication competencies, institutional learning capacity, and the willingness to establish partnerships that transcend the cultural sector. In a context of increasing adaptive pressure, the systematic cultivation of human and relational capital enables libraries to perform a stabilizing and integrative role within local communities. German public libraries that recognize intellectual capital as a strategic asset gain the opportunity to redefine their place within the social fabric – from service-oriented information providers to institutions that foster social cohesion, civic inclusion, and participatory engagement. Their future will depend on the ability to manage intangible resources in a planned, integrated, and reflective manner – resources that determine their capacity for renewal, innovation, and effective response to evolving socio-cultural challenges. This concluding synthesis serves both a summarizing and applicative function. It brings together the core insights presented throughout the study and positions intellectual capital not as a supportive asset but as a foundational component of the institutional architecture of public libraries. It is emphasized that organizational success in the non-profit sector requires a redefinition of prevailing management models: moving away from a dominant focus on material resources and

formal processes toward a logic centered on knowledge, relationality, and shared cultural responsibility.

This study underscores the necessity of recognizing intellectual capital not as a supplementary aspect of institutional functioning, but as its structural core – shaping not only the identity of public libraries but also their capacity to endure and evolve as institutions of public trust. This perspective aligns with contemporary paradigms of public sector management, in which the strategic integration of knowledge, relationships, and values with community development goals and systemic resilience is increasingly prioritized. The analysis also advocates for the cultivation of reflective leadership and the investment in organizational learning mechanisms, which are essential for transforming libraries into proactive, adaptive, and genuinely community-oriented institutions. From a long-term perspective, these characteristics will determine the sustainability, regenerative capacity, and strategic relevance of public libraries within the architecture of a democratic knowledge society.

Final conclusions and organizational implications:

1. Intellectual capital must be recognized as the institutional core of which development determines the resilience and effectiveness of public libraries in a dynamic social environment. Managing this form of capital cannot remain a peripheral aspect of organizational policy; rather, it must be fully integrated into the institution's overarching mission and vision.
2. The sustainable development of intellectual capital demands coherent human resource strategies, stable organizational frameworks, access to knowledge, and leadership that fosters innovation, collaboration, and reflexivity. Institutions should prioritize mechanisms for knowledge transfer, mentoring, and collective learning.
3. Only an organizational culture rooted in trust, transparency, engagement, and participation can ensure the long-term development of human and relational capital. Strengthening a culture of shared responsibility directly enhances operational effectiveness and the institution's ability to respond to the needs of local communities.

4. A modern library is not merely a service provider but a reflective environment where staff continuously develop their skills and the institution adapts proactively to emerging challenges. Organizational learning should be embedded in the institutional structure as an ongoing process, supported by tools for evaluation and internal dialogue.
5. Library leaders must move beyond the role of resource managers to act as visionaries and integrators of values, strategies, and competencies. Transformational leadership promotes institutions that are mission-driven, development-oriented, and socially impactful.

The future of German public libraries will to an increasing extent depend on how effectively they are able to manage their intellectual capital. Institutions that perceive it not as a cost but as a strategic investment will gain the ability not only to survive but also to create real public, educational, and cultural value.

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# The Recruitment and Selection Process as a Key Component of Human Resource Acquisition Strategy

## ABSTRACT

**Objectives:** The main objective of the study is to comprehensively assess the level of satisfaction of candidates participating in recruitment processes at Company X and to identify key factors determining their satisfaction.

**Methodology:** The study used a diagnostic survey method with a survey technique. The research tool was a proprietary survey questionnaire containing both closed-ended questions and a sociodemographic metric. The study was conducted in March 2025 on a group of 53 people who participated in recruitment for various positions at Company X. Candidates received invitations to participate in the study by email.

**Findings:** Key factors influencing candidate satisfaction include the attractiveness of the terms and conditions of employment, the length and transparency of the recruitment process, the respect shown by recruiters and receiving constructive feedback after the recruitment process. An efficient and transparent process reduces candidates' stress levels, reinforcing their positive feelings toward the organization, which is conducive to building loyalty and promoting the company as an employer.

**Value Added:** This study underscores the key role of the recruitment process, which is an important part of business strategies, with increasing importance being given to candidate satisfaction levels. A positive recruitment experience significantly influences both the decision of candidates to accept an offer of employment and the perception of the company as an attractive employer.

**Recommendations:** Respondents rated their satisfaction with the recruitment process mostly positively, but areas for further improvement were nevertheless identified. Satisfaction with recruitment is determined not only by the specifics of a particular job offer, but also by the overall perception of the organization, including its organizational culture and corporate values. The results of the study indicate that candidate satisfaction is influenced by the quality of recruitment materials, the preferred form of recruitment and the way feedback is provided, as well as other factors.

**Key words:** recruitment, employee selection, human resource management, recruitment tools, recruitment process, factors influencing satisfaction

**JEL Codes:** M12, M51, M53

## Introduction

Recruitment is one of the fundamental processes in human resource management, having a direct impact on the effectiveness of an organization's operations and its long-term development. In the context of dynamic changes in the market environment, the effective recruitment of suitably qualified candidates who fit the organizational culture is becoming a key factor in building a competitive advantage for companies (Armstrong, 2016; Poczowski, 2007). The contemporary approach to recruitment extends beyond the traditional understanding of this process as a mechanism for selecting candidates with the required competencies. Currently, there is an increasing emphasis on the compatibility of the values, attitudes, and goals of potential employees with the mission and organizational culture of the company, which translates into a higher level of employee engagement and retention (Ployhart, 2006).

At the same time, technological developments and demographic and social changes are influencing the evolution of recruitment methods. Organizations are increasingly using innovative tools such as ATS (Applicant Tracking Systems), HR analytics, online recruitment platforms, social media, and artificial intelligence elements to support candidate selection (Chamorro-Premuzic et al., 2016). These solutions not only make it possible to reach a wider group of candidates, but also increase the efficiency of the entire recruitment process and improve the candidate experience.

This article focuses on the analysis of selected recruitment tools and factors influencing candidate satisfaction with participation in the recruitment process. The first part of the paper presents theoretical issues concerning the essence and importance of recruitment in the context of human capital management. It

also discusses contemporary methods and tools used in recruitment activities, drawing attention to their practical application in a changing labor market.

The next part of the article is devoted to the characteristics of recruitment processes at Company X. The company's activities are described, the recruitment strategies used are presented, and the recruitment tools and techniques used are discussed. The rest of the article describes the methodological basis of the author's own research, which aimed to identify the factors influencing the level of satisfaction of candidates with their participation in the recruitment process at Company X. The research method used was a diagnostic survey, using the questionnaire technique, and the research tool was an original questionnaire. The study covered a group of 53 employees who had previously participated in the recruitment process for the company in question.

The last part of the article presents an analysis of the results of the empirical research. The results allowed us to identify key factors influencing the positive or negative experiences of candidates, such as the quality of communication with the recruiter, the transparency of the process, the speed of feedback, and the consistency of the job offer with reality. Based on the analysis, practical conclusions were also formulated regarding the optimization of recruitment processes, which may contribute to increasing candidate satisfaction and improving the effectiveness of HR activities in the organization.

### ***Recruitment as a strategic tool for human capital management in the context of contemporary organizational challenges***

Recruitment is one of the key elements of human resources management of which goal is to attract individuals with the appropriate qualifications, professional experience, and personal competencies that correspond to the specific nature of a given job position. In the literature on the subject, recruitment is defined as a complex, systematic, and strategic process of acquiring candidates in which not only competence matching is important but so is compatibility with the organizational culture and values represented by the organization (Szałkowski, 2000).

From the organization's point of view, effective recruitment is the foundation for building competitive advantage, enabling the effective achievement of

strategic goals by attracting and retaining talent that is key to the company's development (Masibigiri & Nienaber, 2011). A properly conducted recruitment process affects not only the current functioning of the organization, but also its long-term effectiveness, innovation, and adaptability in the face of dynamic market changes.

The candidate selection process is another important stage of recruitment, consisting of analyzing applications in the context of the requirements of a given position. To this end, modern organizations use automated systems such as Applicant Tracking Systems (ATS), which allow for effective filtering of candidates according to predefined criteria (Kostera, 2000). An important element of the selection process are also interviews, which take the form of face-to-face, telephone, or remote (video) interviews, using structured methods that enable the comparability of responses and objectivity of assessment (Golnau et al., 2017).

The final stage of the recruitment process involves making a decision to hire a specific candidate. To this end, a number of assessment methods are used, such as reference checks, psychometric tests, and assessment center techniques, which provide a comprehensive assessment of competencies and cultural fit.

Recruitment also has a strategic role in shaping the employer's image (employer branding). As the first point of contact between the candidate and the organization, it influences the perception of the company as a workplace. Transparency, professionalism, and responsiveness in contact with candidates determine their perception of the company and influence future loyalty and commitment.

Technological developments and changing market expectations have led to an evolution in recruitment methods. The most commonly used practices today include:

- Recruitment platforms and online recruitment, enabling quick access to a wide range of candidates (e.g., LinkedIn, Indeed, Glassdoor);
- The use of artificial intelligence (AI) in CV analysis, automation of the initial stages of selection, and conducting video interviews using tools such as HireVue or Pymetrics;
- Video recruitment, which saves time and offers greater flexibility for both candidates and recruiters;

- Psychometric and competency tests, which provide an objective assessment of candidates' personality traits, cognitive abilities, and technical skills (e.g., Hogan Assessments, Thomas International);
- Gamification, which allows for an innovative assessment of candidates' behavior and competencies through simulations of professional situations;
- Social media and employer branding, used to build a positive image of the organization as an attractive employer;
- Data-driven recruitment, enabling decisions to be made based on an analysis of the effectiveness of individual candidate sources and stages of the process;
- Recruitment chatbots, streamlining communication with candidates and automating administrative tasks;
- Recruitment in line with the organizational culture, where the alignment of the candidate's personal values with the company's values is analyzed.

In summary, modern recruitment is a multidimensional process whose effectiveness determines both the current operational efficiency of the organization and its long-term competitiveness. The use of advanced tools and the integration of employer branding strategies with HR processes helps to attract high-potential candidates, which is becoming crucial in the face of growing competition in the labor market.

### ***Characteristics of Company X's operations and recruitment strategy***

Company X is a modern enterprise located in the Mazovia Province, specializing in the production of innovative food storage solutions. The company's product range includes a wide variety of plastic and glass containers, as well as thermoses, lunchboxes, and kitchen accessories for organizing space. The key objective of the company's activity is to provide functional and aesthetic products that meet high safety standards in terms of contact with food and support healthy and sustainable consumer habits (Griffin, 2017).

The organization employs approximately 550 people, making it a significant employer in the region and an active participant in local social and economic life. Through its participation in social and cultural initiatives, the company strengthens its role in corporate social responsibility (CSR).

The company's mission is to design and deliver high-quality solutions that support a healthy lifestyle while caring for the environment. To this end, environmentally-friendly technologies and recyclable materials are implemented, which is in line with current trends in sustainable development in the packaging industry. The company's vision is to become a leader in the production of food containers and to build long-term relationships with customers based on trust, quality, and innovation.

In terms of human capital management, Company X implements a recruitment strategy that ensures a multifaceted approach to attracting and retaining talent. Particular emphasis is placed on attracting candidates with experience in the food production sector and technical and operational skills in line with the company's business profile.

As part of its recruitment activities, the company is actively involved in local labor market initiatives – it participates in industry fairs, conducts information campaigns in schools and universities, and develops relationships with educational institutions. Another element of the strategy is the consistent development of employer branding through social media (LinkedIn, Facebook, Instagram, TikTok), which helps to build a positive image of the employer and increases the attractiveness of job offers in the eyes of potential candidates (Backhaus & Tikoo, 2004; Kuchеров & Zavyalova, 2012).

The company uses a range of modern recruitment tools, including:

- ATS (Applicant Tracking Systems) – enabling the automation and optimization of the candidate selection process, contributing to a reduction in recruitment time (Stone et al., 2015);
- Video interviews – used in particular at the pre-selection stage, ensuring flexibility and cost savings;
- Recruitment platforms and social media – enabling precise targeting of job offers and promotion of organizational culture;
- Assessment Center – used for an in-depth assessment of competencies through simulations and practical tasks, especially for specialist and

managerial positions. Due to the increased competitiveness of the labor market and the growing expectations of candidates in terms of flexibility, professional development, and quality of the work environment, Company X strives to maintain staff stability through internal development. It offers its employees training programs, mentoring, and career paths, which translates into reduced turnover and increased engagement.

## Research methodology and description of the respondent group

### *Purpose and scope of the research*

The purpose of this study is to comprehensively assess the level of satisfaction of candidates participating in recruitment processes at Company X and to identify the key factors determining their satisfaction. The study aims to explore candidates' perceptions of the individual stages of the recruitment process, from the moment of application to the final recruitment decision. Based on the analysis, it will be possible to formulate practical recommendations for optimizing recruitment activities, which may contribute to increasing the attractiveness of Company X as an employer. In addition, the study will make it possible to determine the extent to which positive recruitment experiences influence candidates' decisions to accept job offers.

According to W. Zaczyński, the purpose of the research should be understood as "a more precise definition of what the researcher is aiming for, what he wants to achieve in his work", and this purpose should be characterized by "concreteness, clarity, and realism" (Zaczyński, 1995, p. 86).

### **Subject and scope of the study**

The subject of the study is the experiences and opinions of candidates participating in recruitment processes at Company X. According to J. Sztumski, the subject

of the study may cover various aspects of social reality, including communities, institutions, processes, and social phenomena (Sztumski, 1995, p. 7).

The study was carried out using the diagnostic survey method, a questionnaire technique, and a survey questionnaire addressed to people who had participated in recruiting for various positions at Company X was used as the research tool. The group of respondents was carefully selected to ensure high accuracy of the data obtained. The questionnaire also included a form enabling the identification of the basic demographic and social characteristics of the respondents, such as gender, age, level of education, and job position.

A total of 53 responses were collected – 36 from women (67.9%) and 17 from men (32.1%). Respondents were classified into six age categories: under 18 (1 person, 1.9%), 18–25 years old (34 people, 64.2%), 26–35 years old (7 people, 13.2%), 36–45 years old (5 people, 9.4%), 46–55 years old (6 people, 11.3%), and over 55 years old (no respondents). The level of education was as follows: primary – 3 people (5.7%), vocational – 6 people (11.3%), secondary – 27 people (50.9%), higher – 17 people (32.1%).

In terms of job positions, the majority of respondents were line employees – 34 people (64.2%), 10 people (18.9%) were specialists, 6 people (11.3%) held managerial positions, and 3 people (5.7%) declared other positions, such as: team coordinator (1 person), intern (1 person), while one person did not specify a specific position. Data analysis revealed a predominance of women in the research sample and a predominance of respondents aged 18–25. Among women, those with secondary and higher education predominated, while among men, secondary education was most frequently indicated. Regardless of gender, most of the respondents were line employees.

## **Research problem and research questions**

According to T. Pilch's definition, a research problem is "a question about the nature of the phenomenon under study, about the essence of the relationships between events or characteristics of processes" (Pilch & Bauman, 2001, p. 43). The main research problem of this study was to determine what factors determine the level of candidate satisfaction with the recruitment process.

The following research questions were asked as part of the study:

- Does the quality of recruitment materials affect the level of candidate satisfaction?
- What form of recruitment do candidates prefer – traditional or remote?
- Does feedback after a recruitment interview, regardless of its outcome, affect candidate satisfaction?
- How does the level of satisfaction with the recruitment process affect the candidate's final decision to accept a job offer?

## Research hypotheses

The main research hypothesis assumes that the level of candidate satisfaction with the recruitment process at Company X is significantly dependent on the quality of communication, the transparency of the individual stages of recruitment, and the waiting time for a decision.

The following specific hypotheses were formulated for the research questions posed:

- High-quality recruitment materials (job advertisement, website, job description) have a positive impact on candidate satisfaction.
- Candidates prefer the traditional form of recruitment because it provides them with a greater sense of security, trust, and direct contact with the employer.
- Receiving feedback after the recruitment interview, regardless of the outcome, increases candidate satisfaction.
- Satisfaction with the recruitment process influences the candidate's decision to accept the job offer by building a positive image of the employer and strengthening trust in the organization.

## Research methodology

The study used a diagnostic survey method with a questionnaire technique. The research tool was a proprietary questionnaire containing both closed questions and sociodemographic data. The study was conducted in March 2024 in electronic

form. Candidates received invitations to participate in the study by email, along with instructions and information about its purpose and nature.

The questionnaire was designed to obtain reliable and complete data, allowing for a multidimensional analysis of the factors influencing candidates' experiences and their attitudes towards the company as a potential employer.

Analysis of empirical data on the identification of factors determining the level of satisfaction of participants in the recruitment process at Company X.

The results of the survey were presented in descriptive form, taking into account both percentages and absolute numbers of responses, which allows a detailed analysis of the collected empirical material.

The first question of the survey concerned the respondents' overall level of satisfaction with participation in the recruitment process. The respondents could indicate one of six responses: "very good", "rather good", "don't know", "rather bad", and "very bad". The largest percentage, 43.4%, indicated a response of "rather good", and 37.7% rated the process as "very good". Undecided was expressed by 11.3% of the respondents ("don't know"), while 5.7% described the process as "rather bad" and 1.9% as "very bad". These data indicate that the overwhelming majority of the participants (81.1%) viewed the recruitment process positively. At the same time, it is worth noting the existence of a group of those who were undecided and critical of the experience (a total of 13.2%), which may indicate the need for improvements in some areas.

The second question asked respondents to rate the availability of information on job openings, salaries and requirements for candidates. 62.3% of respondents described this information as "rather available" and 18.9% as "very available". Negative answers ("rather unavailable" and "very unavailable") received 15.1% and 3.8%, respectively. A total of 81.2% of the respondents rated the availability of information as sufficient, which can be interpreted as a positive signal regarding the transparency of offer communication. At the same time, almost one in five respondents indicated difficulties in accessing these data, which may affect application decisions.

The next question examined the impact of the quality of recruitment materials (such as advertisements, job descriptions and handouts) on the decision to participate in the recruitment process. 81.1% of the respondents agreed that

well-prepared materials encourage them to participate in recruitment. Only 13.2% said they did not pay attention to their quality, and 5.7% had no opinion. These results clearly indicate the high importance of the quality of the recruitment message. Among those downplaying the quality of materials, young people (18–25 years old) predominated, which may be due to limited experience or lower awareness of HR processes.

Another question concerned the impact of the length of the recruitment process on candidate satisfaction. 83% of the respondents declared that the length of time was important to their evaluation of the process. A further question specified the preferred length of the process, with 79.2% of the respondents indicating a response of “rather short” and 7.5% indicating “very short”. Only 13.2% of respondents felt that a longer process could have a positive impact on satisfaction. This means that for most candidates, it is important that the recruitment process is efficient and not prolonged beyond the need.

Respondents were also asked about their preferred form of implementing the recruitment process – traditional or online. 66% of the respondents preferred face-to-face meetings, while 34% preferred the remote formula. The preferences vary by demographics – the online form was most often chosen by younger respondents (18–25 years old), especially women.

The importance of feedback after a recruitment interview was rated very highly, with as many as 81.1% of the respondents considering it to be definitely important to satisfaction levels, and another 9.4% expressing moderate agreement. Despite this, another question showed that only 26.4% of the respondents said they always receive feedback. As many as 52.8% admitted that they do not receive it at all, indicating a significant inconsistency between candidate expectations and recruitment practices.

One question asked about the relationship between satisfaction with the recruitment process and the decision to accept a job offer. 49.1% of the respondents indicated a “definitely yes” answer, while 41.5% indicated a “rather yes” answer. A total of 90.6% of the respondents admitted that the quality of the recruitment process influenced their decision to accept employment, highlighting the strategic importance of this stage for the employer’s image.

With regard to communication during the recruitment process, 58.5% of the respondents said they were satisfied, while 41.5% expressed some reservations (“not always”). No one indicated the “no” option, which may indicate a generally positive, though not uncritical, perception of communication on the part of the employer.

In the next question, the respondents were able to indicate the factors that had the greatest impact on their satisfaction with the recruitment process (multiple choice option). The most common choices were: attractive terms of employment and salary (58.5%), empathy and respect from recruiters (49.1%), duration of the process (50.9%), quality of feedback (49.1%), and quality of the interview (41.5%). Aspects such as ease of application (18.9%), form of recruitment (13.2%), and regular contact during the process (18.9%) were less important, although still important.

The survey also included an assessment of fairness and equal opportunity in recruitment processes. 54.7% of respondents rated them as rather favorable to equal opportunities, and 20.8% as definitely favorable. However, 17% of respondents expressed doubts (“rather not”) and 3.8% indicated “definitely not”, signaling that some candidates perceive potential areas of unequal treatment.

The last three questions were open-ended and allowed the respondents to freely express their opinions.

In the question on the preferred form of recruitment, 13 people indicated online recruitment as more convenient – mainly due to convenience, time savings and the opportunity to participate in a familiar environment. In contrast, 26 people opted for the traditional form, arguing for the possibility of direct contact, getting to know the company and prospective team better, and assessing the atmosphere in the workplace.

The second open-ended question concerned the impact of satisfaction with the recruitment process on the decision to accept an offer. Respondents indicated that the clarity of communication, the professional approach and the respect shown to candidates translate into a positive assessment of the company and a desire to be associated with it professionally. Thus, the recruitment process represents, for many, the first key experience with a prospective employer.

In the last open-ended question, respondents provided their suggestions for possible improvements to Company X's recruitment process. Among the suggestions, the most frequently mentioned were: the need for systematic feedback, reducing the length of the process, increasing transparency about responsibilities and financial terms, and improving the quality of communication and the interview atmosphere. These suggestions underscore the need to build a recruitment process based on respect, transparency, and professionalism.

## Conclusion

Recruitment is now a key element of business strategies, with increasing importance attributed to candidate satisfaction levels. Respondents rated their satisfaction with the recruitment process mostly positively, but areas for further improvement were nevertheless identified. Satisfaction with recruitment is determined not only by the specifics of a particular job offer, but also by the overall perception of the organization, including its organizational culture and corporate values. A positive recruitment experience significantly influences both the candidates' decision to accept a job offer and the perception of the company as an attractive employer.

Important factors influencing candidate satisfaction include the attractiveness of the terms and conditions of employment, the length and transparency of the recruitment process, the respect shown by recruiters and receiving constructive feedback after the recruitment process. An efficient and transparent process reduces candidates' stress levels, reinforcing their positive feelings toward the organization, which is conducive to building loyalty and promoting the company as an employer. Professionally prepared recruitment materials and their readability are an important factor in determining candidates' interest in an offer. Precise communication of the requirements of the position motivates candidates to apply.

In addition, receiving constructive feedback, regardless of the outcome of the recruitment, is fundamental to building a positive corporate image. Timely

and clear communication minimizes uncertainty and stress, emphasizing the professionalism of the organization.

The impact of satisfaction with the recruitment process on the decision to accept an offer is significant. A positive recruitment experience increases candidates' motivation to work with you, and a well-organized process contributes to attracting highly qualified employees. Satisfied candidates often act as brand ambassadors, promoting the company in social settings and on social media.

The results of the survey indicate that the level of candidate satisfaction is influenced, among other things, by the quality of recruitment materials, the preferred form of recruitment, and the way feedback is provided. The level of satisfaction is important for the decision to continue working together, especially when the recruitment process is effective and conducted in a friendly atmosphere. Clear communication and consistent messages about the organizational culture increase candidates' willingness to hire. Despite the limited size of the research sample, the results provide a valuable basis for further in-depth analysis in this area.

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# CSR In The Service Of The Brand Image Of Globalized Companies

## ABSTRACT

**Objectives:** The main objective of this study was to examine the role of CSR as a strategic lever in shaping the diplomatic efforts of globalized companies operating in Algeria's mining sector. It focuses on analyzing how CSR can contribute to the enhancement and reinforcement of the brand image of these globalized companies.

**Methodology:** A qualitative research approach was adopted within an entrepreneurial framework. A total of 43 in-depth interviews were conducted, involving various stakeholders associated with Lafarge-Algeria, a prominent MNC recognized as one of the country's leading non-oil exporters. The collected data were systematically organized, analyzed, and validated.

**Findings:** The results showed that CSR constitutes a crucial lever of CD. They emphasize a significant correlation between CSR and the enhancement of the image of MNCs. CSR practices were found to be deeply rooted in the integration of the local socio-economic and cultural context into corporate strategic development. This connection becomes especially clear in how businesses shape their identity and participate in CSR initiatives.

**Value Added:** This study makes a significant contribution to the existing literature on CSR by providing empirical evidence on the link between the adoption of a CSR approach, diplomatic practices, and the enhancement of corporate image within Algeria's mining sector—a subject that remains largely unexplored in the context of emerging economies. In doing so, it adds meaningful value to a body of literature that has predominantly focused on developed economies.

**Recommendations:** Based on the results, it is recommended that MNCs consider CSR as an essential component of CD, serving as a driver of competitiveness and corporate image. To further strengthen their reputation, companies should integrate ethical and sustainable standards into their strategies, ensure transparency by informing and communicating about their actions and impacts, and actively engage with local stakeholders. This includes improving working conditions and contributing to the overall quality of life within the communities in which they operate.

**Key words:** corporate diplomacy, sustainable development, CSR, competitiveness, brand image, MNCs, projects

**JEL Codes:** D6, E2, F5, L1

## Introduction

In today's changing international context, where different agents, groups, and even nations frequently oppose one another, only a diplomatic approach has a chance of leading to consensus-based solutions that are acceptable to all stakeholders. As a result, diplomacy has become universal and omnipresent.

When a multinational corporation (MNC) decides to expand or establish itself in a country or region, its international commitment exposes it to a variety of political, geopolitical, and socioeconomic risks, while also opening the door to unexpected economic opportunities. In this context, it is imperative for MNEs to discern the main geopolitical trends, anticipate risks, and effectively manage all stakeholders, whether internal or external. The ultimate goal is twofold: to defend their interests while generating profits and strengthening their image. Thus, developing a corporate diplomacy (CD) strategy becomes essential. This strategy enables interaction with stakeholders, whether local or international, within a coherent and integrated framework. It helps build lasting and mutually beneficial relationships while helping the company influence its global and local environment in its favor. Furthermore, adopting such an approach provides the company the ability to gather the information necessary to support and optimize its internationalization process.

In this perspective, as was the objective of this study, it is essential to consider the role of corporate social responsibility (CSR) as a potential lever for corporate diplomacy in a globalized context. CSR contributes significantly to the creation of a positive and sustainable image, thereby promoting the strategic and international success of companies.

## ***Research problem***

That being said, this study examined, more specifically, the importance of companies taking CSR into account as a powerful lever that could enable them to participate in multilateral sustainable development (SD) programs, as well as the conditions for responsible SD, while placing the issues inherent in corporate governance at the heart of the analysis. Thus, its objective is to respond to the following questions: What is the link between CSR and CD? Is CD an important component of CSR? How does CSR contribute to the development and improvement of the brand image of multinational companies? These are the questions we attempted to answer in this research, by studying the interest shown in CSR by globalized companies operating in Algeria in order to better measure the impact of their actions both on stakeholders and in terms of promoting and strengthening their brand image.

## ***Hypotheses***

Given the research questions posed, a working hypothesis was formulated in order to try to explain the link that exist between CSR, CD, and brand image enhancement. Thus, we support the idea that CSR is an important diplomatic lever available to companies to defend and improve their reputation and image (legitimacy) with their internal and external stakeholders.

## ***Study objectives***

The effectiveness of a CSR policy in enabling globalized companies to achieve the diplomatic objectives of their international development strategy aimed at strengthening their brand image is undeniable. It can indeed fill the gap regarding the effect of the work context and the attractiveness of the offer on legitimacy, project acceptability, and competitiveness. Thus, the objective of the study was to understand the issue of CSR in a multinational company operating in the mining sector in Algeria, namely Lafarge-Algeria. In recent years, this company, which is considered one of the leading non-oil exporting multinationals in the

country, has taken initiatives in the area of CSR by creating structures to carry out this mission. In doing so, we first tried to identify the actions taken with regard to local stakeholders in diplomatic events related in particular to the management and development of local staff, and secondly, we highlighted the impact of these actions in terms of their contribution to the company's development and competitiveness. Furthermore, this analysis also explores how their actions complement SD goals and contribute to circularity, all of which are essential aspects for aligning their practices with current global priorities.

### ***Research methodology***

In our research, we adopted a diplomatic approach in the entrepreneurial environment. The data collection tools used were designed based on the research objectives and questions. The study combined conceptual and theoretical aspects tracing the importance of companies as major actors in development and their policies, CSR in particular, with empirical aspects analyzing the latter practice in the case of globalized companies in Algeria. In order to identify existing definitions and theories on CD and CSR, a systematic review was conducted. This method allowed us to address multiple specific questions and to carry out an in-depth analysis of the literature examined and increasingly used in the field. This study adopted a qualitative approach that aimed to analyze the socially responsible aspects of Lafarge-Algeria's activities. It was also based on a data collection approach.

### ***Study structure***

In order to answer our questions and ensure that all aspects of the subject were taken into consideration, we have structured our study around three main areas, in line with the research objectives set:

- Theoretical framework: debate,
- Field of investigation and research methodology,
- Empirical study: case of the Lafarge-Algeria Company.

## Theoretical framework: debate

The concept of SD is now an important part of the social environment of businesses. This notion was introduced into the political arena (at the end of 1987) by Norwegian Minister G.H. Brundtland, with the aim of remedying ecological damage. The central idea is based on meeting present needs without compromising the ability of future generations to meet theirs, thus reconciling environmental protection, social progress, and economic development (Brundtland, 1987).

SD gained international status as a paradigm in 1992 at the Earth Summit in Rio, which defined its legal basis through founding texts such as Agenda 21 and the Framework Convention on Climate Change. This momentum was reinforced in 2002 with the World Summit on SD in Johannesburg. At the same time, Kofi Annan launched the “Global Compact project”<sup>1</sup> on the sidelines of the World Economic Forum in Davos in 1999, aiming to establish a partnership between the UN and the private sector to promote more humane globalization within global society.

In this context, MNEs, as social actors, have an obligation to integrate sustainable practices. They must collaborate with their stakeholders and optimize their eco-efficiency: producing more while reducing their consumption of resources, thereby limiting waste and reducing their environmental impact (Boualam, 2008).

Although initially multinational corporations sought to circumvent their responsibilities by relocating their polluting activities to countries with less stringent environmental and social standards, today they are increasingly inclined to fully assume their responsibilities and adopt an SD’s approach. This shift is taking place in a context marked by growing power struggles between

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1 This is a commitment defined with trade union, development, and human rights organizations and confederations (Amnesty International, Human Rights Watch, etc.), through which companies undertake to implement actions to advance the values of the United Nations system (Universal Declaration of Human Rights, Covenant on Economic and Social Rights, ILO Core Principles, etc.) (World Economic Forum, n.d.).

civil society and locally based MNEs, with local populations now more aware of the impacts of their activities and responding firmly.

### ***CSR, a microeconomic perspective on sustainable development***

Howard Bowen undoubtedly marked a key milestone in the development of CSR with his 1953 book, *Social Responsibilities of the Businessman*. In it, he highlights the practices and statements of American managers in the 1950s, thus opening the debate on CSR while establishing a distinction between ownership and management. In 1978, Bowen revisited his initial reflections, acknowledging the idealistic nature of his concept of voluntary social responsibility, and insisted on the need for a more structured and formal approach to operationalize CSR.

According to Bowen (1953), the notion of CSR for business people “refers to their obligations to follow policies, make decisions, or follow guidelines that are desirable in terms of our society’s goals and values (...) they must not disregard socially accepted values or place their own values above those of society”. Thus, CSR is often perceived as a vague concept, but its objective is fundamental: to contribute to the humanization of globalization and regulate the functioning of the capitalist economic model.

Furthermore, in 1975, Preston highlighted the lack of boundaries in the concept of social responsibility and the difficulty of measuring the impact of initiatives in this area. During the 1970s, the concept of “responsiveness” became central to studies conducted in the United States, as evidenced by the work of researchers such as Ackerman (1973), Ackerman & Bauer (1976), Frederick (1978), and Sethi (1979). In addition, Bowen’s proposals concerning social auditing were taken up and further developed by other authors, notably Blum (1958); Bauer & Fenn (1973); Votaw (1973); Carroll & Beiler (1975); and Waddock & Smith (2000).

In 1975, Carroll highlighted three essential dimensions of CSR: the level of CSR, the commitment to finding solutions to social issues, and the fundamental values that guide the meaning of this responsibility. He also distinguished four main types of obligations associated with CSR: economic, legal, ethical, and philanthropic.

## ***CSR, an evolving and multidimensional concept***

Although the concept of CSR is frequently mentioned in contemporary discussions, its definition remains complex due to the multiplicity of existing perspectives and interpretations. Numerous institutions, both regional and international, as well as many authors, have attempted to define the concept. In its third communication on CSR (2011), the European Commission characterizes CSR as “a responsibility of firms for the effects of their activities on society” (cited in Mignon & Sarant, 2016). In a complementary vein, the International Organization for Standardization (ISO) (ISO 2010) also emphasizes the role of companies in managing their impact on society and the environment, while advocating ethical and transparent conduct. This framework also includes the need to take into account the expectations of stakeholders.

According to Imbs and Ramboarison-Lalao (2013), CSR corresponds to a company’s integration of the social and environmental expectations of its various stakeholders into the definition of its strategic objectives. Pestre (2011) highlights the increased complexity for globalized companies, which operate in a broader international context. They are subject to pressure from a greater number of stakeholders, whose expectations are more varied and diverse than in a strictly domestic context. Consequently, the process of building a CSR strategy takes into account a high degree of interaction between the three main pillars of a multinational company: headquarters, geographic areas, and subsidiaries.

## ***CSR approach and promoting of the company’s image<sup>2</sup>: interaction between two concepts***

The growing interest in CSR and corporate reputation does not seem to have been clearly identified until now. Indeed, for some authors, CSR is perceived as

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2 According to LeBlanc and Nguyen (1995), a company’s image is based on five key elements: corporate identity, physical environment, personality, service offering, and staff in direct contact with customers. Wei (2002), meanwhile, considers that a company’s image corresponds to the perception that stakeholders have of it,

an upstream lever that contributes to building a good reputation for the company. An effective CSR strategy is also synonymous with a healthy and successful company (Binninger & Robert, 2011).

Sprinkle and Maines (2010) identify four main reasons why organizations engage in CSR initiatives. The organizations may have altruistic intentions; they may use CSR activities as a showcase to appease various stakeholder groups; for the potential benefits of recruitment, employee motivation, and retention; and for customer related motivations, as CSR can encourage consumers to buy the company's products and services.

Adopting a CSR approach is therefore a major strategic issue for a company. Not only does it improve its image and reputation (legitimacy), but it also strengthens its relationships with stakeholders (suppliers, subcontractors, and consumers) (Binninger & Robert, 2011). As a result, CSR is a key tool in what could be described as "business diplomacy", an aspect that we will explore in more detail below.

Despite its initial costs for the company, CSR proves to be a crucial lever both operationally (short term) and strategically (long term). It enables companies to increase their competitive advantage and competitiveness. For globalized companies operating in developing or emerging countries, which often face complex challenges (corruption, social inequality, power struggles, deforestation...), CSR offers an opportunity to respond effectively to these challenges. Rather than exploiting the institutional weaknesses inherent in these environments, some companies have been able to use CSR as a solution to address and overcome these challenges (Cezarino et al., 2022).

In the context of developing countries, several obstacles hinder the widespread adoption of a CSR approach. These challenges include the lack of a clear regulatory framework for social and environmental reporting; unfair competition fostered by counterfeiting and the informal economy; the high costs associated with adopting international standards and certifications; an imbalance in government policies on worker and environmental protection; low unionization rates;

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while corporate identity refers to the fundamental characteristics that define the organization, its objectives, and its culture.

and a corporate culture that is not conducive to stakeholder engagement. Faced with this reality, it is essential for companies to establish a genuine culture of social responsibility and SD at the heart of their activities.

### ***Corporate diplomacy, a concept in search of a definition***

Although globalized companies frequently engage in actions requiring diplomatic behavior in their interactions with stakeholders, the scientific literature on CD remains underdeveloped. Furthermore, no consensus definition has emerged to date, and researchers tend to refer to the same concept using a variety of terms.

Diplomacy, in its traditional political sense, encompasses the management of international relations, the methods used to conduct them, and the skills of the individuals responsible for these interactions, taking into account their associated profession. It can be defined as an art aimed at safeguarding or promoting one's interests while presenting them in a manner acceptable to stakeholders. Today, diplomacy relies on a variety of instruments and extends to several dimensions of public life, particularly those related to the economic sphere. Economic diplomacy has established itself as an essential and common component of the diplomatic functions and activities carried out by various institutions, such as embassies. The latter help companies in their countries to find business opportunities abroad and to pursue their interests there, either through political channels or in the form of professional assistance. In short, economic diplomacy is characterized by the deep integration of economic issues into the diplomatic missions of states (Guesmia, 2022).

Economic diplomacy and CD have a close and complementary relationship, offering a double advantage: on the one hand, they help to strengthen a country's reputation, and on the other, they highlight the products and services offered by its companies. Diplomacy in the business world, known as CD, can be characterized as a strategic function of the company that is inspired by that of states and includes design, representation, negotiation, and forecasting, processes that resemble, particularly in supranational companies, the activities of the Ministry of Foreign Affairs (Simonneau & Cersa, 2015). Steger (2003) perceives CD as the professional and methodical management of the entrepreneurial environment,

aimed at streamlining interactions and aligning the company's activities with societal expectations. The author draws attention to the fact that contemporary companies are facing the disappearance of geographical boundaries, but also of those between themselves and society. These complex relationships often lead to a lack of clarity in terms of responsibilities and a weakening of mutual trust. From this perspective, CD is similar to an advanced approach to public relations, emphasizing intensive communication between all stakeholders. Lucas (2012) emphasizes that reflecting on the best synergies between the public and private sectors is now a crucial issue.

Mirvis et al. (2014) emphasize the importance of transparent (institutional) communication on the part of the company, pointing out that managers (and senior staff) have a role similar to that of diplomats. They must be attentive to the expectations of their stakeholders and seek to find mutually acceptable solutions. The concept of CD thus represents a form of interface management, a shared space between the company and its partners where it becomes crucial to take different perspectives into account, discuss differences, and use them to reach compromises (Ruël et al., 2013). This approach helps to build trust, which Goodman (2006) identifies as the main objective of CD. Saner et al. (2000) also identifies other objectives associated with this diplomacy in the entrepreneurial environment: influencing economic and social actors to generate new business opportunities; collaborating with supranational organizations to develop international standards governing entrepreneurship; preventing conflicts between stakeholders; and exploiting international forums and communication channels to improve the company's image. For Lucas (2012), CD encompasses a strategic vision and helps to strengthen the company's competitive capabilities by improving its performance.

The role of diplomats has been examined by numerous authors. According to London (1999), diplomats assume responsibility for their own actions, those of their colleagues, and those of others. They are dedicated to defending the entrepreneurial interests of their company while seeking to cooperate with stakeholders whose perspectives may differ or even be opposing. Saner and Yiu (2014) consider that "CD concerns the management of interfaces between an MNC and its external non-commercial counterparts (NGOs, local governments, etc.) that have an impact on the multinational's reputation capital and its

ability to shape and influence its operating environment". Alammam et al (2016) define CD as "establishing and maintaining positive relationships with internal and external, professional and non-professional stakeholders, including employees, businesses, governments, and civil society actors, in order to create and maintain legitimacy and a social license to operate, build alliances, and shape and influence the environment". Today, it could be argued that it is no longer enough to simply defend one's company's positions. It is now necessary to adopt a proactive stance, moving from a defensive strategy to an offensive approach marked by a diplomatic spirit, as suggested by De Raymond (2015).

In general, economic and political literature offers various approaches to analyzing a concept as seemingly broad and vague as that of CD or strategic diplomacy. According to Gomez (2014), it is defined as an entity's ability to mobilize its internal and external networks in order to develop and protect its strategic assets. This implies that companies must forge and maintain strong links with their external environment, as Steger (2003) also points out. Wolters (2012), cited by Attarça (2019), expands on this definition by describing strategic CD as "the establishment, by executives or their representatives, of lasting and positive relationships with foreign governments and non-governmental stakeholders (economic and non-economic) with the aim of creating and developing legitimacy in an international business environment". Fundamentally, CD enables companies to position themselves both in debates and in the realities of international politics, economics, and markets. It is therefore an approach that can be adapted to all types of companies, whether multinational or local, large or small. Furthermore, many authors point out that companies have gradually integrated diplomatic activities into their practices. This innovation is particularly visible in the emergence of new specialized profiles, such as corporate diplomats (Henisz, 2014), who act as intermediaries, facilitators (Saner et al., 2000), or strategic pivots (Dahan et al., 2015) between the organization, its environment, and civil societies.

### ***Company diplomacy and CSR: what is the connection?***

In scientific literature, previous studies have explored the conceptual link between CD and CSR (Westermann-Behaylo et al., 2015; White et al., 2011),

while suggesting the integration of CD into a CSR framework. In this vein, the study of White et al. (2011) highlights “the power of companies in society and their responsible use in the political arena”. Extending this line of thinking, Mogensen (2017) and Ordeix-Rigo and Duarte (2009) confirm that “social power and political responsibilities are essential dimensions of CD”. At the same time, other authors, such as Ordeix-Rigo and Duarte (2009) and Weber and Larsson-Olaison (2017), have highlighted that the main challenges related to SD lie in the ability to respond to social pressures exerted by external stakeholders, while reconciling the expectations of the company’s foreign stakeholders in order to strengthen its legitimacy.

Among the strategies identified to address these external pressures in a host country is engagement on social, political, and environmental issues. This approach allows the internationalizing company to participate in global regulation, a process often equated in the literature with CSR policy (Scherer & Palazzo, 2011).

However, although Westermann-Behaylo et al. (2015) acknowledge that research on CSR policy enriches the concept of CD by “highlighting the influence of non-financial values (...) and the types of public responsibilities that companies can assume by practicing CD”, the theoretical implications related to the interconnection between CD, CSR, and public diplomacy are not sufficiently discussed. The latter is considered a corporate governance activity (Scherer & Palazzo, 2011) and defined as the company’s participation in political decision-making in the country where the company is based (Westermann-Behaylo et al., 2015). However, it must be admitted that the ways in which CSR policy theory could develop the understanding and theoretical foundations of CD are rarely explored.

Although in recent years many studies have begun to address this topic—focusing, it is important to note, on developed countries—there is still no consensus on a definition. Nevertheless, it is crucial to continue and intensify efforts to further develop the theory of CD. It is important to note that the work of Westermann-Behaylo et al. (2015), as well as that of White et al. (2011), already integrates the concept of CD into the theoretical frameworks of CSR policies. These studies show that applying CSR principles promotes “the enrichment of the concept of CD and allows for a more comprehensive perspective on it” (Westermann-Behaylo et al., 2015). Furthermore, Molleda (2011)

highlights the role that CD have in relation to CSR, the latter being viewed as a political practice guided by the principles of social responsibility policies. These policies are sometimes described as corporate governance activities (Scherer & Palazzo, 2011) and reflect, in particular, companies' involvement in the decision-making processes of the host country (Westermann-Behaylo et al., 2015).

Nevertheless, it is undeniable that the mechanisms enabling theoretical approaches to CSR policies to further deepen the understanding and conceptual foundations of CD remain largely unexplored. This study aimed to address this gap by delving deeper into the subject, with a specific focus on globalized companies operating within an emerging economy – namely Algeria. These companies are active in the mining sector, an industry known for its substantial environmental and social impacts. As such, the need to establish robust social responsibility policies becomes critical, both to enhance their brand reputation and to ensure the legitimacy and acceptance of their projects, among other factors.

### ***Corporate diplomacy tools in CSR***

Beyond the involvement of local managers in the administration of subsidiaries in their host territories, globalized companies use various diplomatic mechanisms to strengthen their legitimacy and promote their products. Several levers can be identified among these initiatives. First, training is a key strategy. The training centers developed by these companies prepare their employees to become true ambassadors, both for organizational practices and for the products they sell. Participation in these training programs generates personal fulfillment among employees, which have a decisive role in strengthening their commitment to the values and identity of the organization. In addition, this approach helps improve interpersonal relationships within the company. Second, normalization and standards, which are the pillars of economic development, have a central role. Companies strive to disseminate their norms and standards beyond local borders. The more territories that adopt these standards, the more feasible it becomes to expand their market through an approach based on economic and strategic intelligence. Thirdly, promoting shared values is also a major objective

in an integrative economic approach. The consideration of environmental and social issues, reinforced by the advent of the concept of SD, particularly through the rise of renewable energies and energy efficiency solutions, etc., reflects this strategic orientation. In this context, the promotion of diplomatic dynamics through multilateral agreements is part of the desire for diplomacy oriented towards SD. In conclusion, it can be said, in line with the work of Asquer (2012), that both CD and CSR approaches are strategic tools for managing interactions with stakeholders and preserving corporate reputation.

In conclusion, and based on the points developed above, within the framework of the approach that considers CD as an integral component of CSR, this study aimed to contribute to research on these two concepts and to enhance the brand image of globalized companies by developing a clear definition that is particularly suited to the context of emerging economies, especially rentier states. We are thus laying the foundations for future empirical analyses on the use and effects of CSR and CD. After exploring various definitions, it was essential to propose a formula that met the requirements of our research: a professional and intelligent approach to managing the socio-economic and political environment, aimed at ensuring optimal conduct of activities while promoting constructive and sustainable interaction between the company and its various stakeholders.

## Field of Investigation and Research Methodology

### *Research design*

This study adopts a qualitative approach in the entrepreneurial environment to examine the impact of CSR on the brand image of Lafarge-Algeria as a globalized company. Qualitative interviews were conducted with around forty-three (43) participants (most of whom had higher education) in order to better understand perceptions of CSR practices and the importance of having a good CSR policy. The

participants were selected using purposive sampling (a non-probabilistic method) to ensure that stakeholders from different departments of the company and civil society were represented (see Table 1 below). The period analyzed covers the years 2012 to 2023<sup>3</sup>.

This method was chosen in order to gather different points of view (perceptions of stakeholders) on the issue of CSR within the company. The interviews were conducted either face-to-face (in person) or via email, depending on the availability of the participants. Each interview lasted approximately 25 to 40 minutes and was conducted in French or Arabic, depending on the participants’ preferred language. All interviews were recorded with the consent of the interviewees, and the data were sorted, analyzed, and verified. A thematic analysis was also used to examine and interpret the themes and trends that emerged from the various responses.

**Table 1.** Methodology and Study Sample Characteristic

Nature of interviewees	General information about the field study	Quality of respondents	Number of people
Internal stakeholders	<ul style="list-style-type: none"><li>- Qualitative data</li><li>- Semi-structured interviews: main tool used</li></ul>	Employees, Managers	14
External stakeholders	<ul style="list-style-type: none"><li>- Objective: to identify stakeholders’ views on CSR practices at Lafarge subsidiaries</li></ul>	communities, customers, suppliers, government agencies	29

Source: developed by the author.

3 This choice is motivated, on the one hand, by the gradual opening up of the Algerian economy to international investors, which has created a need to adapt the legal and regulatory framework. On the other hand, this choice is explained by the growing importance of integrating CSR strategies observed in many developed countries. Furthermore, the relatively recent presence of Lafarge in Algeria, since 2008, as well as its rapid expansion in the local market and its commitment to social and environmental issues, particularly due to the polluting impact of its activities (construction materials), also justify this study period.

## Research approach

Based on existing theoretical and conceptual support, available resources from the business community, our own interviews with employees, managers, and certain civil society actors in the regions where Lafarge operates, and an analysis of the content (reading and accounting analysis of the company's cash flow and social spending), we have sought to identify the company's social and environmental actions and achievements, as well as its diplomatic practices in its relations with the various stakeholders, their strengths and weaknesses, and their prospects. Lafarge Holcim<sup>4</sup> is a multinational corporation that has been internationally oriented since its creation, and therefore has considerable experience operating in different sociocultural environments, with the resulting advantages and difficulties.

The objective of our interviews with several people (employees, citizens, managers, in particular) was to identify progressive trends in stakeholder involvement in the implementation of socially responsible actions, including CD, and the trends conveyed and developed by Lafarge subsidiaries. At first glance, we observed that the latter sometimes more or less automatically integrate their current practices into the process of social and environmental protection in Algerian companies, where neither the mindset nor the institutional framework was ready for this. Consequently, it would be interesting to study how socially responsible practices contribute to the development, competitiveness, and acceptability of Lafarge's projects (and their adaptation to the local social and cultural context).

Thus, to better understand the importance of CSR as an important component of CD, we focused on the relationships between the company and its stakeholders in the context of the actions taken and the impact of these actions on the image and reputation of Lafarge and its products, and to understand the extent to which the company's diplomatic attitude toward stakeholders

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4 In Algeria, following the acquisition of the Orascom Group in 2008, Lafarge created a new subsidiary, Lafarge Algeria. This provided it with access to markets in the Middle East and Africa. This strategic decision enabled Lafarge to establish a presence in Algeria as a producer and exporter to African countries (LafargeHolcim, 2016).

encourages the involvement of local actors in the management and implementation of projects.

These are the reasons why we chose the Lafarge Group<sup>5</sup> for this study: Lafarge ranks as one of the leading private entities in Algeria, alongside Tosyali in the textile/steel sectors and Intradis Agricole Group. It is also a prominent non-hydrocarbon exporter in the country. The company operates in a strategic sector, but one with significant social and environmental impacts. In this case, the adoption of a CSR approach in this company represents a new area of control for its stakeholders. Internationally, Lafarge has taken an important position, benefiting from complementarity and synergy between its global and local activities. From this perspective, Lafarge must adapt to its environment in Algeria in terms of CSR.

Lafarge Algeria staff were asked about the following topics: their knowledge of CSR and the actions taken in this regard; corporate identity and values, their societal practices (relations with customers, suppliers, civil society); their social practices (combating discrimination within the company and social dialogue); their environmental practices (prudent management of resources and energy, preservation of the natural environment); their governance practices and internal organization.

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- 5 LafargeHolcim has positioned itself in global and national markets thanks to its various competitive advantages. This has enabled it to become a leader in the construction materials sector, namely through the quality of its product range, its service, its compliance with standards, and the quality of its management.

In accordance with international standards, all Lafarge cements are certified NA442-2013 according to Algerian standards and EN197-1 according to European standards (LafargeHolcim, 2017). A high level of service quality, supporting wholesalers in product sales, thanks to field agents known as FSOs, hired by Lafarge Algeria to strengthen customer loyalty and relationships (LafargeHolcim, 2018). In addition to these advantages, LafargeHolcim adopts commercial strategies that generally depend on the nature of the target market, the environment, and the competition. Its strengths include its reputation as a global market leader; its availability to serve customers; the development of employee skills; an international working environment with teams of various nationalities; diversification of its product offering; high-level innovation capacity; and respect for its social and environmental commitments.

Furthermore, as the main objective of our study was to effectively analyze the brand image of Lafarge Algeria and better understand how it is perceived by various stakeholders, it is essential that we conduct an in-depth study based on a range of specific indicators. These include, among other things, stakeholder perceptions, reputation indices, distinctions, or awards obtained, as well as environmental, social, and governance parameters. As illustrated in the summary table below, these elements provide a comprehensive and nuanced view of how the company is perceived. In addition, it is crucial to take into account indicators related to the acceptability of projects. These measures are based directly on the concerns expressed by stakeholders. The assessment can be approached from two distinct angles: from a quantitative perspective, it evaluates the overall level of acceptance, the interest generated by economic benefits such as job creation, and the perception of any associated risks; as well as from a qualitative perspective, it examines stakeholder's perception, the company's reputation and brand, consistency between discourse and actions, a responsible corporate culture, social innovation, and the strengthening of trust. These two angles of analysis are essential for obtaining a comprehensive and balanced understanding of the company's brand image.

To complete the analysis, we include an in-depth assessment of perceived value, asking whether the socio-economic benefits generated outweigh or offset any negative impacts. In doing so, the selection of criteria to be examined must be carefully tailored to the objectives of the study and the chosen scope of analysis, whether it concerns the company's product or a given geographical area. This methodology helps to ensure transparent and objective communication of the results obtained. However, it is essential to recognize certain limitations inherent in this approach. The qualitative variables used may be influenced by the behavior of the respondents. For example, a reluctance to speak freely or a requirement for anonymity can sometimes hinder the collection of reliable information and affect the accuracy of the conclusions. Therefore, as in any research, it is necessary to take into account the existence of reasonable margins of error related to these methodological constraints. Despite these limitations, the results remain highly relevant and make a significant contribution to understanding Lafarge's brand image.

**Table 2.** Process for evaluating the brand image of a globalized company

Brand image assessment	Measurement indicators	Assessment criteria		
	<b>Indicator 1:</b> CSR (qualitative and quantitative criteria)*	Environmental pillar	Social pillar	Economic/ governance pillar
	<b>Indicator 2:</b> CD	Communication strategy	Alignment of actions and discourse	
	<b>Indicator 3:</b> Perception and impact	Stakeholder perception (reputation and acceptability of projects)	Brand image performance and credibility	

\* Quantitative criteria (CO2 emissions, recycled waste, employee productivity, etc.) and qualitative criteria (customer satisfaction, employee engagement and involvement, stakeholder perception, etc.)

Source: prepared by the author.

## Empirical study: case of the Lafarge-Algeria Company

Before moving on to discuss, as is the objective of this article, certain diplomatic initiatives and achievements at the socio-economic and environmental levels at Lafarge, as well as their impact on the company’s image (competitiveness and acceptability of projects), we believe it is very useful to first understand how the concepts of CSR, corporate value (corporate identity), and communication are perceived by stakeholders.

## ***Definition of CSR, corporate value and diplomatic communication***

### ***Definition of CSR***

According to the results of our survey, we observe that managers perceive CSR as a set of social and environmental activities offered by the company to the local community. For them, CSR toward stakeholders consists of seeking to maximize profits and additional financial income in proportion to the volume of investment in social responsibility. Employees, on the other hand, see the need to consider employee capabilities and social conditions by offering them bonuses, rewards, and training. When it comes to the projects assigned to them, they state that it is the company's obligation to take quality and innovation into account by complying with standards and taking responsibility from production to product marketing. On the environmental side, they assert that it is mandatory for the company to dispose of existing waste on its sites, otherwise their work becomes incomplete and of poor quality.

Furthermore, with regard to CSR, we observe that the majority of executives interviewed see CSR as an opportunity that allows Lafarge to take socially responsible actions and to build closer ties with the community, thereby improving its image and legitimacy in the eyes of its partners and potential competitors. Meanwhile, the rest of those interviewed see CSR as much as a conviction, considering it a communication focus as well as a constraint.

Regarding the focus of CSR, the survey shows that the highest frequency is for environmental issues (50%), followed by human issues (35%), and finally economic issues with a frequency of 15%.

Finally, the main interests of CSR can be classified as follows: improving the value of the company, increasing turnover, attracting customers, attracting the best talent, and improving corporate communication. Moreover, the majority of the respondents confirm the implementation of ISO 26000 and ISO 14001 procedures.

Company values

The survey revealed that, among Lafarge’s main corporate values, people are often the most important, followed by quality and compliance, ethics and transparency, long-term vision, innovation and leadership, and commitment.

(Diplomatic) communication between the company and its stakeholders

From our literature review, we can see that Lafarge takes into consideration the principles and core issues of ISO 26000 and ISO 14 001, as well as the adaptation of these operational objectives in the areas of CSR. As shown in Table 3 below, the company feels concerned by:

**Table 3.** Key principles and issues for Lafarge from a stakeholder perspective

Stakeholders	CSR Objectives
Employees	Labor relations and working conditions; Freedom of association and bargaining rights; Guaranteeing non-discrimination and a gender approach
Customers and consumers	Product safety; Right to consumer information
Professional community and value chain	Developing practices and lobbying for the development of CSR best practices; Influencing the product value chain
Environment	Discharges and waste; Packaging recycling; Financing green projects
Local community	Youth and education

Source: compiled by the author from the survey.

Unquestionably, Lafarge’s Algerian managers, imbued in particular with diplomatic approaches, have won the trust of management by adopting more or less intuitively the same attitude (headquarters) toward other stakeholders. In terms of personal and professional commitment, they focus on staff motivation and mobilization, and on internal and external communication. In terms of communication, Lafarge communicates with all its stakeholders, which is an important act of diplomacy on its part (social and environmental reporting, CSR results, etc.).

Internally, the company communicates with its internal stakeholders using information technology and paper posters, and regularly issues reports. Externally, by way of example, on Wednesday, April 04, 2018, Lafarge organized an “Open Day” exclusively dedicated to informing and raising the awareness of civil society on the theme of the environment, associating their activities and structuring projects in progress, bearing the label “preservation of the environment and CD”.

On Tuesday April 12, 2016 at the Hotel El Aurassi in Algiers, it also organized the 12th edition of the technical seminar on construction under the theme “Building locally, Building sustainably”, dedicated to the presentation of new construction techniques and processes using local building materials, solutions that are more environmentally friendly, more economical, more sustainable, more aesthetically pleasing while favoring the use of locally available materials.

Notwithstanding the above-mentioned initiatives to involve stakeholders, according to many of those interviewed, certain decisions or operations are carried out without the knowledge of the players concerned (unilateral decisions), in addition to the fact that certain factors (private and personal) are not taken into consideration in the staff motivation system, and that there is an absence of institutional communication on the results and actions of subsidiaries toward local people. However, it must be emphasized that Lafarge managers often have no difficulty in presenting their ideas and communicating their vision of the company’s development to their teams or other interested parties. We can therefore confirm that communication is an important lever of governance and motivation.

### ***Concrete manifestations of socially responsible actions, achievements and diplomatic management***

In terms of relations/relationships between the company and its stakeholders, CD as part of a CSR approach can be achieved by providing the local staff with room to maneuver, both in their decision-making processes and management practices, and in the operationalization of decisions. Such an approach is based, on the one hand, on trust in local players (managers, employees, etc.) and their skills and, on the other hand, on respect for the economic, social and cultural

context that they know well and know how to exploit to the benefit of the company's efficient operation in Algeria.

Overall, in our case study, the results of Lafarge's diplomatic management can be seen in the company's identity, motivation policy (management), communication policy and its commitment to CSR. But it's worth mentioning that it's on this last point that our analysis is centered, as is the title of this article, which basically aimed to analyze the CSR approach as an important lever serving the company's development and image.

In what follows, we will first highlight the company's main socio-economic and environmental actions and achievements, and then outline their contribution to improving the image, competitiveness and acceptance of Lafarge projects in Algeria.

### **Lafarge's CSR actions**

Aware that any industrial activity can have an impact on the environment, Lafarge Algeria is committed to taking charge of aspects linked to the rehabilitation of industrial sites, in accordance with the provisions of the Algerian mining law (Law 01-10 of 03/07/2001) and its own commitments in terms of SD.

To this end, Lafarge Algeria relies on the Group's international standards. Environmental impact and management studies are carried out for all quarries currently in operation. As soon as they are opened, they have a redevelopment plan integrated into the operating plan, which includes environmental protection (preservation of biodiversity, water, soil and landscape) and taking into account the views of stakeholders (local authorities, environmental agencies, etc.). To this end, partnerships and agreements have been signed with a number of partners<sup>6</sup>.

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6 Lafarge Algeria has signed a partnership agreement with the Tosyali Algeria group to recycle metallurgical industry waste in Lafarge's cement production process in Oggaz, through a sustainable development and natural resource conservation approach, in line with their environmental and social values. Since its creation, the cement plant has placed SD at the heart of its activities (ISO 26000).

## **Environmental responsibility at the service of corporate identity**

In addition to environmental protection actions, Lafarge's responsible behavior toward civil society is another component of its identity. Since the beginning of the third millennium, the concept of CSR has been the subject of much interest in the literature, and many companies are beginning to adopt it.

It goes without saying that Lafarge Algeria's adherence to the CSR concept would inevitably contribute to reinforcing its identity and values. This can be seen on both the parent company's website and that of its Algerian subsidiary. In this way the company's managers always set out to support the most appropriate activities from the point of view of the needs of its stakeholders (employees, customers, etc.).

Looking at the three pillars of CSR, we can see that Lafarge's environmental pillar is directly linked to its business activities. The company invests heavily in energy-efficient technologies and innovation, and contributes to the development of the circular economy. Lafarge's cement plant (Oggaz) is the first in Algeria to adopt a circular economy approach through the treatment and recovery of industrial residues (recycling). In 2015, an initial "Geochute" investment was launched to process expired pharmaceutical products and other packaged waste, such as chemicals, and to recover sludge from dams for use in cement production as a substitute for natural materials<sup>7</sup>.

On a social level, Lafarge seeks to reduce the monotony of certain jobs through job rotation, job sharing, and efforts to balance employees' personal

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<sup>7</sup> The National Center for Cleaner Production Technologies and Lafarge Algeria have signed a scientific and technical cooperation agreement as part of an SD initiative. Lafarge Algeria has been working for several years to adapt the Holcim Group's green growth strategy in Algeria. This includes the launch (in 2019) of CHAMIL™ ECOPlanet cement, the first green cement in Algeria, which offers the same performance but with a 40% lower carbon footprint than conventional cement, thanks to innovative industrial processes and the preservation of local resources. These initiatives also include the renewal of a new fleet with newer, less polluting trucks and the launch of studies to develop solar energy at its sites (Algerieinvest, 2020).

and professional lives. It is also committed to investing in human resources and transferring know-how through a range of practical training courses<sup>8</sup>, partnerships with various universities<sup>9</sup>, intensive training programs for its employees in Algeria and abroad, as well as developing first-class health and safety<sup>10</sup> conditions for its employees and those who interact with its activities, and promoting local economic development around the sites where it operates. Lafarge Algeria employs more than 2,600 people and is committed to developing civic initiatives for its communities. It also has more than 3,000 subcontractors.

These examples of CSR further confirm that in order to improve the company's image and identity, particularly among stakeholders, it is important to remember that each party has a role to perform in developing mutually beneficial relationships.

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- 8 For example, the agreement signed between ANGEM and Lafarge (2014) aimed to train young artisans benefiting from the National agency of the management of microcredit (ANGEM) program in the application of decorative concrete at Lafarge Algeria's Applied Research Laboratory (CDL Rouïba), encouraging the creation of micro-enterprises specializing in the application of innovative concrete and products, and integrating these micro-enterprises into a network of applicators, subcontractors, and partners of Lafarge Algeria.
  - 9 For example, Lafarge Algeria and University of science and Technology of Oran (USTO) are launching a specialized master's degree program entitled "Manufacturing and Quality Control of Construction Materials". This two-year specialized program is part of the Academic Partnership Agreement signed at the end of 2011 by Lafarge Algeria and USTO, under which Lafarge has already welcomed students from various programs to its concrete plants, cement factories, and offices for discovery visits and internships. Under this agreement, Lafarge has also sponsored national and international seminars and attracted experts who have regularly given lectures at universities that have benefited from Academic Partnership agreements.
  - 10 In the area of health and safety, Lafarge organized the first conference on road safety (the objectives and rules of Health & Safety at LafargeHolcim Algeria, with workshops on topics such as driver training and behavior, load management, and vehicle equipment).

### **Involving local stakeholders in investment decisions and implementation strengthens the company's identity and image**

With regard to perceptions of Lafarge's identity, a sense of belonging to a company with its own culture, values, and reputation was clearly evident during the interviews. The company's identity is well known to stakeholders (managers, employees, civil society, local officials, etc.). It is perceived not only through its status as a global company (logo) but above all through its business activities (socially responsible), technologies, technical processes and constantly evolving expertise. A sense of pride (and even confidence) was identified among the interviewees. In any case, the corporate identity lends credibility to its products and services, creates links among stakeholders (employees, customers), and leaves its mark on the reputation of Lafarge Algeria.

Admittedly, as it is a large, globally known company, its identity preceded its arrival in Algeria (through its history, culture, and principles). However, if this identity (reputation) was not constantly reinforced by the involvement of local actors in the decision-making process and the operationalization of activities within the company operating in Algeria, it would not remain so present in the minds of the various stakeholders (positioning). Lafarge Algeria's identity bears the mark of diplomacy because it is presented by the parent company and perceived by stakeholders more as an opportunity than as an imperative or a necessity to be respected.

### **CSR promoting competitiveness and business development**

A company operating in a given territory that does not take its social and environmental responsibilities seriously may find its development seriously hampered (which can damage its reputation).

CSR is included in the annual reports required by shareholders and investors. It is generally accepted that CSR contributes, on the one hand, to improving competitiveness and, on the other hand, to the acceptability of certain projects. This is what we observed in the company studied during our interviews and in our documentary analysis.

## **Improving Lafarge's competitiveness in the Algerian market**

In order to be competitive and stand out from its competitors, a company must highlight its CSR actions. CSR contributes to improving its overall performance, to concrete improvements in innovation, and to strengthening its attractiveness.

That being said, as our survey shows, in terms of Lafarge's performance, its SD commitments were not only positive in terms of the production process (water and energy savings), but also in the long term, in terms of taking into account relationships with stakeholders and protecting and preserving the environment in which the company operates.

In terms of innovation, although environmental and social aspects are most often seen as costs (constraints) by Lafarge, this has nonetheless led the company to innovate in many cases (adapting its production lines to a highly energy- and water-efficient model; repositioning its products on greener lines; complying with social and environmental standards; using advanced technologies (digitization of personnel, etc.). These are all initiatives and commitments that have led to further innovation and adaptation to new societal and environmental challenges.

In terms of attractiveness, it should be noted that, according to those interviewed, Lafarge's CSR strategy has made it highly visible and attractive to external stakeholders (by retaining employees who value their work, as well as to its customers and other local players who place greater trust in Lafarge, especially as a socially responsible company).

## **CSR, a lever for the acceptability of company projects**

CSR is not only a factor in competitiveness, it is also a means of making certain projects, which would otherwise have been controversial, acceptable. This is the case for the company we studied, which is committed to developing a social environment in the areas where it operates, by building gardens and supporting local associations. This was a real lever for reassuring local stakeholders (civil society) and involving them, or even associating them, with infrastructure investment projects that could have been a danger to the environment (reducing dust

emissions, preserving fossil and non-renewable natural resources through substitutes derived from waste and/or industrial residues, and local waste recovery).

It should also be emphasized that taking social and environmental issues into account (in addition to job creation and economic growth) is an important factor in winning projects by gaining the support of local stakeholders, who are now extremely well informed and well organized (associations, NGOs, etc.). Lafarge Algeria's product is also attractive and highly prized for its quality, durability, and environmental friendliness. We can therefore confirm based on the above conclusions, the main hypothesis of this study: CSR enhances the legitimacy, competitiveness, and acceptability of projects, functioning as a diplomatic tool capable of aligning local interests with the strategy of Lafarge Algeria. Therefore, it can be argued that CSR, as an important component of CD, is a significant lever for the brand image of the company studied, namely "Lafarge-Algeria".

CSR is intrinsically tied to globalization and serves as a formidable instrument for MNC, which often command resources comparable to or even surpassing those of national governments. As companies deepen their understanding of CSR and implement its components more effectively, they develop enhanced mechanisms for identifying, measuring, evaluating, and managing the impacts of their operations. In this context, the SD objectives exemplify the diplomatic and strategic dimensions of CSR. It can be inferred that Lafarge-Algeria aligns its initiatives with the SD goals to guide its commitments. For instance, the company has established a fund to provide health coverage for its employees, advancing the realization of target 3.8. Similarly, it has increased internship opportunities to address youth unemployment and meet the objectives of goal 8.6. Additionally, efforts to create more green spaces around their facilities reflect a contribution toward achieving goal 11.7.

## Conclusion

This study aimed to examine the link between the adoption of a CSR approach, diplomatic practices, and the brand image of globalized companies. More

specifically, it sought to examine the impact of CSR policy on strengthening the brand image of globalized companies operating in the non-hydrocarbon production sector in Algeria (the mining industry). In doing so, conceptual and theoretical aspects were integrated into an empirical analysis (case study of Lafarge-Algeria) based on a sample of 43 participants. The research provided several key conclusions:

We observe that Lafarge Algeria's commitment, like that of certain multinational companies (particularly in the oil sector) in Algeria, to adopting CSR principles is based on the principles and guidelines of the United Nations SD's objectives. We observe that this has enabled the company to improve its image and reputation among its various stakeholders at the local and national levels. It is clear that, in order to ensure the success of its CSR approach, the company often combines social and environmental dimensions with its activities, such as improving working conditions, ensuring health and safety, and engaging in dialogue with stakeholders to promote local and SD. In the area of ethics, training for all staff has helped to strengthen their sense of belonging (corporate identity and values) and provides meaning to what they do. Lafarge continues to develop a clear corporate communications policy (towards stakeholders) that incorporates a CSR policy enabling them to maintain a positive brand image.

We conclude that Lafarge Algeria's adoption of a CSR approach is an important lever for its development and performance improvement and for facing its local competitors (competitiveness and project acceptability), especially since the company is already well positioned thanks to its international reputation and competitive advantage. CSR even functions as a diplomatic tool capable of aligning local interests with corporate strategy. We conclude that CSR is an important component of Lafarge Algeria's diplomacy (better image, improved performance, and a significant role in addressing the country's SD challenges). Consequently, all of this confirms our main hypothesis, which posits CSR as an important lever for enhancing the brand image of multinational companies (MNC).

Practically, although our study was based on the interview method and used some of its techniques, we must admit that we would have liked to supplement it with participant observation. However, this approach would have been difficult to implement for several reasons. It is not easy for a researcher to gain access to

all departments within a company, as some prefer to avoid becoming the subject of study. However, this step remains essential in order to enrich and deepen the analysis. In addition, we often encountered difficulties in approaching senior executives, due to their unavailability or personal constraints; some even declined to participate altogether. This is why we believe that future research would benefit from further developing this dimension. The absence of participant observation could, in our case, negatively affect the scope of the results, insofar as our analysis could not be limited solely to the opinions gathered from participants. However, it is essential for researchers to immerse themselves in the company's various departments, as well as in trade unions and citizen associations: talking to managers (in particular the head office), trade unionists, and suppliers, but also observing the daily lives of staff, would provide a better understanding of their involvement, particularly in decision-making processes. Nevertheless, despite these limitations and shortcomings, our study highlights compelling and useful results for assessing the impact of CSR on the image of globalized companies operating in the mining sector, particularly through the prism of developing economies and the intersection of CSR policy and corporate diplomacy.

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