

РОЗДІЛ VI. ПРОБЛЕМИ МЕНЕДЖМЕНТУ ОСВІТИ

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LEADERSHIP THEORIES IN MODERN SCIENTIFIC DISCOURSE

The article summarizes the scientific works by researchers who have studied the theories of leadership. The aim of the article is to cover the main theories of leadership. The authors of the article have used a variety of research methods to provide a comprehensive overview of leadership theories, including analysis, synthesis, generalization, and systematization.

The authors argue that leadership theories have evolved over time, which is a widely accepted view among scholars. The article provides a useful classification of leadership theories into six main approaches, including great man theory, trait theory, behavioural theory, contingency theory, influence theory, and relational theory.

Further research is needed in specific areas, such as educational leadership, higher education leadership, and teacher leadership, which is a valuable contribution to the field.

Keywords: *leadership; educational leadership; leader; leadership theories; classification of leadership theories; great man theory; trait theory; behavioural theory; contingency theory; scientific discourse.*

Introduction. In a society developing on democratic principles, leadership, relationships, and competition serve as effective and efficient tools for social progress. One area where leadership is rapidly evolving is education.

Educational leadership involves a person with experience and knowledge in education influencing others to promote development and improve the educational process. This leader could be a teacher, school principal, head of an education department in a local authority, or any other individual who influences teaching and the educational process.

An educational leader must understand the needs of students and teachers, manage resources, coordinate processes, and possess teamwork and problem-solving skills. Moreover, a leader should have a clear vision for the future development of education and be able to direct others toward achieving those goals.

To be an effective educational leader, it is necessary to refer to various leadership theories. They are crucial tools for understanding how leadership affects organizations and their members. These theories emerged in response to the question of what makes a leader successful and what characteristics are important for success.

There are many leadership theories. Each theory offers a unique attitude to leadership and provides tools for determining the most effective approach to leadership in specific situations.

Leadership theories can be used to understand how leadership affects organizational behaviour and performance and to develop leadership strategies that help achieve positive results.

Analysis of relevant research. Many researchers have devoted their studies to the issue of the development of leadership theories. Among their contributions, there are M. Agboola, S. Benmira, R. Daft, P. Drucker, S. Flynn, R. Gill, M. Hernandez, M. Johnson, B. Kellerman, E. Mango, G. Stanley, T. Weber, G. Yukl, and others.

The works by Ch. Grint, K. Harrison, O. Uslu, S. Robbins, and others cover a critical review of leadership theories.

A. Chorny, S. Kalashnikova, O. Klochko, K. Kozak, O. Kononenko, T. Modestova, L. Serheyeva, O. Yuzkova, and others are those Ukrainian scientists who discuss the problem of leadership. However, the level of leadership research by domestic scientists is insufficient.

Thus, it allows us to note that the phenomenon of leadership has been of scientific interest and discussion among researchers of various scientific fields in many countries for more than a hundred years. Accumulated empirical and experimental facts, and formulated theories that explain them, still leave many uncertainties and questions about leadership. Therefore, **the aim of the study** is to highlight leadership theories in modern scientific discourse.

Research methods. There are the following research methods that have been applied in the article: analysis, synthesis, generalization, and systematization – to study philosophical, psychological-pedagogical, and methodical references on the research problem; terminological analysis – to characterize the key definitions of the research; structural and logical analysis – to determine the features of leadership theories.

Results. The new reality for today's organizations involves globalization, shifting geopolitical forces, outsourcing, advanced technology, virtual teams, e-business, economic uncertainty, widespread

ethical scandals, and insecurity associated with war and terrorism. People in organizations around the world are feeling the impact of these trends and are forced to adapt to new ways of working.

Consequently, the rapidly changing environment is causing fundamental changes that have a dramatic impact on organizations and create new challenges for leaders. These changes represent a transition from a traditional to a new management paradigm (Daft, 2008); from administration and management to leadership (Kononenko, 2022). There is a shift towards recognizing the importance of human capital and organizational management (Mango, 2018). S. Kalashnikova emphasizes that leadership is not only a higher evolutionary level of management but also a manifestation of a new higher level of management quality (Kalashnikova, 2010). It is also recognized that effective leadership is key to the success of any organization (Benmira, & Agboola, 2021).

To form a fundamental understanding of the phenomenon of leadership as a key aspect of leadership theories, let's consider the origin of the term. The etymology of the root of the words «lead», «leader», and «leadership» comes from the Anglo-Saxon word «laed», which means «way» or «road». The verb «laeden» meant «to travel». Thus, in a broad sense, a leader is a person who goes ahead, pointing the way to fellow travellers (Kalashnikova, 2010; Yuzkova, 2021). T. Modestova agrees with this definition of the term. She believes that a leader is someone who knows the way, follows it, and shows it (Modestova, 2018). However, the phenomenon of leadership is so multifaceted that there is still no single definition of this concept (Yuzkova, 2021).

W. Bennis considers that «leadership is the most studied and least understood topic in the social sciences, and never before have so many people worked so long to say so little» (Bennis, 2009). R. Daft emphasizes that «the definition of leadership has been a difficult and elusive problem mainly because the nature of leadership itself is complex» (Daft, 2008). He also considers that significant progress has been made in recent years in understanding the essence of leadership as a real and powerful influence on organizations and societies (Daft, 2008).

P. Northouse supports this opinion and suggests that from 1900 to the present, leadership researchers agree on one thing: they cannot come up with a general definition of leadership. Due to such factors as increasing global influence and generational differences, leadership will continue to mean different things to different people (Northouse, 2019).

According to researchers, there are over 1,500 interpretations of the term «leadership» (Kellerman, 2012) and more than 60 theories describing leadership and leadership styles (Mango, 2018). S. Benmira and M. Agboola, among other scholars, claim that there is no universal definition or specific approach to leadership, and efforts continue to determine what makes an effective leader (Benmira, & Agboola, 2021). P. Northouse believes that almost all classifications of leadership have one thing in common: leadership is an influencing process that helps groups of people achieve goals (Northouse, 2019).

To understand leadership as it is viewed and practised today, it is crucial to recognize that the concept of leadership evolves. Leadership reflects wider society, and theories have changed alongside shifting norms, attitudes, and understanding of the world (Daft, 2008).

Even though leadership has been a subject of interest to historians and philosophers dating back to ancient times, it was not until the 20th century that scientific research on leadership commenced (Daft, 2008). Most scientists believe that leadership as a phenomenon arose at the dawn of human civilization because the universally recognized factor that influenced people's actions and the course of events was a specific person – the leader. Each period, country, or community required «its» leader given the place, time, and challenges that had to be overcome. While attempts to research the phenomenon of leadership reach deep into history, the term «leadership» emerged in the English language during the latter half of the 19th century and the early part of the 20th century.. The study of leadership became interdisciplinary, studied in psychology, management, sociology, political science, (Yuzkova, 2021) and education.

P. Northouse outlined the chronological order and analyzed the development of leadership from the beginning of the 20th century to modern times, paying special attention to how each theory can be applied to improve leadership in practice (Northouse, 2019).

R. Daft categorizes leadership theories into six primary approaches, which comprise the great man theory, trait theory, behavior theory, contingency theory, influence theory, and relational theory. He defines four eras of leadership:

- Era 1 – theories of the great man and traits;
- Era 2 – behaviour and contingency theories;
- Era 3 – theories of influence;
- Era 4 – relational theories (Daft, 2008).

In the paper «The Evolution of Leadership Theory», S. Benmira and M. Agboola single out the Trait Era, to which they relate the theory of the great man (1840s) and the theory of traits (1930–1940s), the Behavioral Era, which corresponds to behavioural theory (1940–1950s), the Situational Era (chance and situational theories, 1960s), and the New Era of Leadership, which includes transactional, transformational (1990s), and other theories (2000s) (Benmira, & Agboola, 2021).

According to R. Daft (2008), leadership theories trace back to the theory of great people, which he calls the forefather of leadership concepts (Daft, 2008). Historian Th. Carlyle was a pioneer of the theory of great men. In the book «On Heroes», which he wrote in 1841, Carlyle considered great men who lead a life in all spheres such as government, politics, and religion (Uslu, 2019).

According to the great man theory, which has traditionally associated leaders with men, effective leaders possess inherent and distinctive traits from birth that enable them to achieve greatness as a result of divine intervention (Benmira, & Agboola, 2021). However, the theory has been criticized for its gender bias (Spector, 2016) and its failure to emphasize the harmonization of people in organizations or businesses (Grint, 2011). It is worth noting that women were not at the forefront of fields such as business, politics, religion, and public administration at the time when the theory was developed (Kirkpatrick, & Locke, 1991). Another criticism of the theory is that it suggests leadership qualities are genetic and cannot be learned or acquired later, which may not be entirely accurate (Uslu, 2019).

The theory of traits emerged in the 1930s – 1940s and focused on identifying the personality traits and characteristics that distinguish leaders from non-leaders. Trait theorists believed that certain innate traits, such as intelligence, confidence, and assertiveness, were necessary for effective leadership (Daft, 2008).

This theory neither claims that leaders are born nor made; rather, it suggests that leadership potential is influenced by both innate and acquired characteristics. While some traits may be inherited, others can be developed through experience, education, and training (Uslu, 2019).

Although research on leadership traits has not been able to identify a definitive list of characteristics that guarantee leadership success, interest in the topic continues. Trait theory is still considered a relevant approach to understanding leadership, and many organizations use personality tests and assessments to identify potential leaders (Daft, 2008).

In the 1940s and 1950s, global organizations grew so much that they required new rules and standard procedures to ensure efficient and effective performance of activities. During this period, the concept of a «rational manager» emerged, who managed and supervised others using an impersonal approach. Employees were not expected to think for themselves; instead, they were supposed to follow rules, and procedures, and complete specific tasks as instructed (Daft, 2008).

Consequently, a new theory of leadership was needed, which led to the development of behavioural theory. This theory was based on a critical rethinking of trait theory and focused on studying the behaviour and actions of leaders, their interactions with followers, and their influence on followers' motivation. Leaders are mostly made, not born, and specific behaviours can be learned to enable effective leadership. According to A. Klochko (2021), the focus is placed on the leader's actions and behaviors rather than their personal traits or characteristics. However, the theory does not give much consideration to the circumstances and context in which the leader is operating.

Major studies in behavioural theory include the University of Iowa research by K. Lewin, the Ohio University research, and the University of Michigan research, as well as contributions from other scholars such as Th. Boydel, R. Blake, and J. Mouton (Uslu, 2019). These studies grouped different patterns of behaviour and labelled them as styles, an approach that has become common in management education. R. Daft notes that the Blake and Mouton Managerial Grid is possibly the most renowned instance of this concept. The theory suggests that a leader's conduct usually comprises a task or job orientation, an employee or relationship orientation, and a variety of behaviours that fall between these two. (Daft, 2008). The theory posits that behaviours that lead to group success also lead to leader success. In this respect, a leader is not seen as a unique individual, as in great people and trait theories. O. Uslu (2019) argues that a leader's effectiveness is not separate from the group they lead, and it relies heavily on their conduct and relationships with the group members.

The present-day demonstration of the behavioural theory can be seen in various leadership training programs that concentrate on cultivating leadership abilities and behaviours. This reinforces the notion that leadership is mainly acquired through learning (Benmira, & Agboola, 2021).

O. Uslu (2019) notes that the primary criticism of the behavioural theory is that it disregards the situational factors that contribute to

leadership. The effectiveness of leadership can be impacted by various environmental factors, such as the level of employees' maturity, the degree of leader acceptance among followers, the nature of the task, and the cultural values of the employees (Yukl, 2002; Uslu, 2019).

Also, as G. Yukl rightly points out, most theories of effective leadership focus on behaviour used to directly influence direct subordinates, but a leader can also influence other people within the organization, including peers, superiors, and people at lower levels who do not report to the leader (Yukl, 2002).

According to S. Benmira and M. Agboola, the situational era of leadership began in the 1960s, the main theories of which are random and situational (Benmira, & Agboola, 2021). It should be noted that during this time, as A. Klochko notes, the study of the phenomenon of education leadership began (Klochko, 2021).

The situational era is centred on leadership within specific circumstances, rather than the characteristics or behaviours of leaders. As a result, leaders must possess the ability to evaluate their environment and determine the most appropriate style that will «fit» the situation. The contingency theory of leadership, as described by Benmira and Agboola (2021), recognizes that the most suitable leadership style is contingent upon the specific circumstances. Incidental and situational theories claim that leadership cannot be understood in a vacuum, apart from various elements of a group or organizational situation (Daft, 2008).

The emergence of the theory of contingency leadership can be attributed to various factors, including the lack of emphasis on the impact of conditions and environment on leadership (Harrison, 2018), the insufficiency of universal leadership theories, and the recognition that leadership cannot be fully explained by traits and behaviours alone. Contingency theory asserts that an individual may be effective as a leader in particular conditions or environments, but may not be successful in other situations (Uslu, 2019).

Thus, for effective leadership, both leadership behaviours and conditions are crucial elements of the equation. Numerous research studies, methodologies, and models have contributed to the development of contingency leadership theory, with prominent examples being Fielder's contingency theory, path-goal theory, and Hersey-Blanchard's situational leadership model (Uslu, 2019).

F. Fiedler was a pioneer in developing contingency theories of leadership. His theory highlights the importance of contextual factors in

effective leadership and dismisses the idea that there is a single ideal set of leadership traits or behaviors. Despite this, F. Fiedler maintains that a leader's style is inherent and should be matched with situations that are most suitable for their style. Ultimately, the effectiveness of a leader is determined by the extent to which their leadership style is aligned with a particular context (Benmira, & Agboola, 2021).

The path-goal theory is one of the situational leadership theories proposed by R. House in 1971. The author claims that leadership effectiveness depends on how well the leader can help subordinates achieve their goals and satisfy their needs. According to the theory, the leader should establish ways that will lead to the achievement of the set goal and help subordinates understand the necessary actions to achieve this goal. This can include providing support and taking a positive approach to subordinates to help them maintain motivation and confidence in their abilities.

The situational leadership model was developed by K. Blanchard and P. Hersey. The effectiveness of leadership depends on how well a leader can adapt to the needs of subordinates and the characteristics of the situation he has to face (Blanchard, n.d.).

Contingency and situational theories have also faced criticisms. The non-acceptance of the contingency theory of leadership is because this theory does not provide a clear enough methodology for a leader to improve their skills and abilities. One of the main criticisms of this theory is that it does not offer specific advice on how a leader can change their actions to become more effective. Additionally, the contingency theory of leadership believes that a leader can determine their leadership style without considering the situation, which can lead to wrong decisions. Critics also argue that it does not include account the role of the leader's personality traits and abilities, in particular, the ability to manage difficult situations, motivation, and confidence in their abilities. Another criticism of contingency theory is that it focuses on leadership effectiveness rather than ethics and moral principles. Some argue that this can lead to leaders solving problems without considering the ethical aspects and the consequences for subordinates and the organization as a whole (Cherry, 2018; Harrison, 2018; Uslu, 2019).

Critics of the situational leadership theory argue that there is insufficient research to support its effectiveness. Furthermore, some studies have suggested that the methodology utilized in this theory may

be subject to bias and interpretation. Additionally, the theory's complexity and heterogeneity, which encompasses various leadership styles and scenarios, have also been called into question. Some critics believe that this complexity can lead to the misuse of the theory and a misunderstanding of its basic principles. The situational theory of leadership does not take into account the personal characteristics of the leader, such as motivation, character, and other factors that affect their effectiveness. Some critics believe that this may lead to an underestimation of the importance of the leader's personality and the impact of their leadership style on the team.

Moreover, contingency and situational theories also do not consider the cultural differences between organizations and different countries (Harrison, 2018; Uslu, 2019).

In the late 1970s, the emphasis on leadership shifted towards the relational aspect – the way leaders and followers interact and impact each other. Rather than viewing leadership as a one-sided action by a leader towards a follower, it is now perceived as a relational process that actively involves all participants and enables each individual to contribute towards achieving a shared vision (Daft, 2008).

The next phase of leadership development began in the 1980s and continues to the present, placing more emphasis on emotional intelligence, ethics, intuition, and social skills. Leadership has become more flexible and adaptive to change, focusing on creating network structures and ensuring employee development. According to S. Benmira and M. Agboola, this marks the beginning of a new era and theory of leadership that emerged in the 1990s (Benmira, & Agboola, 2021).

This stage is characterized by the development of new approaches and concepts that have become relevant in the face of increasing complexity and uncertainty in the modern world. One of the key directions is the theory of transformational leadership (Bass, & Riggio, 2006), which distinguishes between two types of leaders: transactional and transformational. Transactional leaders focus on accomplishing tasks and controlling their subordinates, using positive and negative incentives. They establish «transactions» with their subordinates, which involve the performance of certain tasks on both sides. The terms of these transactions are usually negotiated, and if one party does not fulfil its part of the bargain, the other party can take steps to restore balance.

Transformational leaders aim to inspire their subordinates to achieve higher goals and bring about positive changes in the organization and society. They look beyond self-interest and act for the good of the organization. These leaders motivate their followers by explaining work roles and task requirements and trying to change the value system and introducing new ideas. They set themselves the task of developing and training their subordinates, maintaining high standards of moral behaviour, and creating an open and protected atmosphere in the team (Flynn, 2019). However, as pointed out by T. Ahmed and co-authors, leaders should focus not only on empowering leadership training but also on providing livelihoods, reorganizing participative decision-making, and taking on new responsibilities while leading a team (Ahmed et al., 2021).

This theory is typically used when an organization requires renewal, is undergoing significant changes, or needs a new direction (Benmira, & Agboola, 2021).

T. Son et al. (2020) suggest that transformational leadership can influence employees' positive attitudes towards knowledge sharing and ultimately improve organizational performance. This finding is consistent with previous research on the relationship between leadership and knowledge-sharing, which suggests that transformational leadership can create a supportive organizational culture that encourages knowledge-sharing behaviours among employees (Hsu et al., 2007).

Therefore, the study by T. Son et al. (2020) may have important implications for organizations seeking to improve their knowledge management practices. However, more research is needed to replicate and extend these findings to different contexts and settings. It may be advantageous to explore the underlying mechanisms by which transformational leadership impacts knowledge-sharing behaviors, as well as identify potential moderators that could impact this connection.

However, the transformational theory also has its critics. Some researchers believe that this theory is too idealistic and impractical. Critics also point out that the transformational theory focuses too much on the leader and can ignore the importance of teamwork and interaction between the leader and subordinates. Some studies have shown that not every leader who seeks to transform their organization will be effective in achieving this. Moreover, this theory does not provide specific instructions on how a leader should transform their organization. In addition, some studies show that transformational leaders can be too dependent on their

position and status, which can hinder the achievement of the higher goals of the organization (Benmira, & Agboola, 2021).

Critics also point to its limitations in understanding and predicting unforeseen situations. Since this theory is based on a predictable exchange between a leader and a subordinate, it does not ponder unexpected circumstances or unpredictable factors that can affect their interaction (Flynn, 2019).

Another direction is the theory of sequential leadership developed by P. Hersey and K. Blanchard, which emphasizes cooperation and interaction between leaders and subordinates (Blanchard, n.d.). This theory suggests that there is not one ideal leadership style and that the best leadership style depends on the specific situation and the level of development of subordinates. According to this theory, there are four types of leadership behaviours: directive, supportive, standard-setting, and delegating. Each of these leadership styles can be effective in certain situations depending on the level of development of subordinates. Therefore, leaders should help their subordinates become leaders in their fields, which allows expanding the circle of influence and the strengthening of collectivity (Kellerman, 2008). Regarding leadership and followership, R. Daft notes that followers are an important part of the leadership process, and all leaders are followers at times. In his opinion, good leaders know how to follow, and they set an example for others. He emphasizes that effective leaders and effective followers can sometimes be the same people who play different roles at different times (Daft, 2008).

Conclusions. Modern organizations and institutions are facing a range of complex challenges brought about by factors such as globalization, technology, and economic uncertainty. These changes require leaders to recognize the importance of human capital and organizational management, which poses new challenges for them. However, the concept of leadership is not straightforward and there is no single definition of it. In fact, there are over 1,500 interpretations of leadership and more than 60 theories that describe it.

Leadership is a process that involves influencing groups of people to achieve specific goals. The study of leadership is interdisciplinary and has been studied in psychology, management, sociology, political science, and education. Leadership theories have undergone transformation over time, influenced by changing attitudes, norms, and perceptions of the world. These theories can be categorized into six distinct approaches, namely the

great man theory, trait theory, behavior theory, contingency theory, influence theory, and relational theory. The areas of educational leadership, leadership in higher education, teacher leadership, and others warrant further additional research.

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АНОТАЦІЯ

Порада Оксана. Куліченко Алла. Теорії лідерства у сучасному науковому дискурсі.

Сучасні організації та інституції стикаються зі складними викликами, що виникають внаслідок глобалізації, технологічного прогресу та економічної невизначеності. Ці зміни ставлять перед лідерами нові завдання, які вимагають уваги до людського капіталу та організаційного менеджменту. Однак, концепція лідерства має багато відтінків, і не існує однозначного визначення. Існує понад 1500 інтерпретацій та більш ніж 60 теорій, що описують лідерство.

У статті описано загальний огляд наукових робіт вчених, які проводили дослідження теорій лідерства. Метою дослідження є висвітлення теорій лідерства в сучасному науковому дискурсі.

У статті застосовано такі методи дослідження: аналіз, синтез, узагальнення та систематизація – для вивчення філософських, психолого-педагогічних та методичних джерел з проблеми дослідження; термінологічний аналіз – для характеристики ключових понять дослідження; структурно-логічний аналіз – для визначення особливостей теорій лідерства.

Оскільки у розвідці було проведено аналіз теорій лідерства, то з'ясовано, що лідерство – це процес впливу на групи людей з метою досягнення певних цілей. Визначено, що теорії лідерства розвивалися з часом в залежності від змін норм, ставлень і розуміння світу, і можуть бути згруповані в шість основних

підходів: теорія великої людини, теорія рис, теорія поведінки, теорія непередбачуваних обставин, теорія впливу та теорія відносин.

Констатовано, що теорії лідерства сходять до теорії великої людини, яка припускає, що ефективні лідери мають вроджені та відмінні риси від народження. Однак цю теорію критикували за гендерну упередженість і нездатність підкреслити важливість гармонізації в організаціях. У 1930-1940-х роках була розроблена теорія рис, що сфокусовано на ідентифікації характерних особливостей особистості, які відрізняють лідерів від тих, хто не є лідерами, тоді як поведінкова теорія, що виникла в 1940-1950-х рр., була зосереджена на вивченні поведінки та дій лідерів. Ситуаційна ера лідерства виникла в 1960-х рр. і зосереджена на лідерстві в конкретних обставинах, при цьому теорія непередбачених ситуацій наголошує на важливості як лідерської поведінки, так і умов для ефективного лідерства.

Дослідження в галузі освітнього лідерства, лідерства вищої освіти, лідерства вчителів та інших сфер потребують подальшого аналізу.

Ключові слова: *лідерство; освітнє лідерство; лідер; теорії лідерства; класифікація теорій лідерства; теорія великої людини; теорія рис; поведінкова теорія; теорія непередбачуваних ситуацій; науковий дискурс.*