

LEADERSHIP AND COMMUNICATION IN SPAIN AND PORTUGAL: THE CATHOLIC CASE

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Abstract

Leadership takes place when a member of a group modifies the motivation or abilities of others or when their attention is directed towards goals or to the path required to accomplish goals (Bass, 2008). Therefore, it would not make sense to limit the scope of leadership to business or politics, where the concept is most commonly referred to. Leadership is a practice that can positively impact many areas, including religion (Campbell, 2021; Díez Bosch, Micó and Sabaté Gauxachs, 2020; Hoover, 2016; Soukup, 2017). Additionally, during this present time of uncertainty and complexity, leadership is necessary for any type of organization. How is leadership approached by religious institutions? What is the role of the digital world in leadership formation? The objective of this study is to map the formation of religious leadership in Spain and Portugal in order to find initiatives and identify current necessities. The selected methodology follows a three-stage process. First, it includes a mapping of online initiatives regarding leadership in Catholic communities. Second, it includes a quantitative survey. Third, is a qualitative focus on groups and in-depth interviews (Busquet and Medina, 2019).

Through the findings of the study, the situation of leadership formation in religious institutions in both countries and the role communication plays in the matter are defined.

Keywords

Leadership; religion; Covid-19; communication; technology

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1. Introduction

1.1. Context

These past years have seen a decrease in Catholic membership in many areas of Europe, including Spain and Portugal. Although these areas have Catholic traditions, numbers have been shrinking, which could cause concerns, especially in light of the downward curve shown by the data. Of the total population, the percentage of those who consider themselves Catholic believers has declined in comparison to former years (INE, 2020). For example, from 2012 to 2017 the percentage of Catholic Christians within the total population has decreased from 88.8% to 60% in Spain, and from 85.6% to 77% in Portugal (The Global Economy, 2013) (Pew Research Center, 2018). It is important to notice the downward trend that could potentially culminate in unfavorable results.

With this context in mind, it is thought that leadership could promote a more favorable environment to stabilize or even increase membership while also complementing and improving perception, performance, attraction and communion (Zsupan-Jerome, 2017).

In addition, the current circumstances brought on by the global Covid-19 pandemic further emphasize this to the extent where leadership has become a necessity to assess during these unprecedented times of uncertainty and ambiguity (Campbell, 2020). With this vulnerability and lack of predictability, a good leader emerges to provide assistance and guidance.

1.2. The Concept

A fundamental step in this study is to describe the concept of leadership. According to Bernard Bass, leadership has more than 350 uses (2008), which serves to acknowledge the field in which this study is developed. Due to this elevated number, leadership can be seen as a notion that is flexible, fluid and very adaptable to particular contexts (Díez Bosch, Micó Sanz and Sabaté Gauxachs, 2020).

¹ Article translated by Diana Clavería.



Nonetheless, it is accurate to say that there is an overarching meaning embedded in the concept, a principal idea that stands to be true in the face of particularities. Bass describes the practice of leading as an interaction between members of a group, involving the structuring or restructuring of situations as well as the perceptions and the expectations of its members. Leadership takes place when a member of a group modifies the motivation or abilities of others or when their attention is directed towards goals or to the path required to accomplish goals (Bass, 2008). Therefore, the comprehensive intention of leadership is directed by individuals who create links between goals, motivations and the members of a group. This direction should provide a change in the actions of group members, making them intensify their contemplation of the achievement of said goals. Hence, leadership requires capability. The ability to motivate, influence and awaken possibilities in individuals in order to fulfill their organizational objectives (House, Hanges, Javidan, Dorfman, Gupta, 2004).

It is important to note that this ability for leadership can be put into practice in a variety of ways. In other words, there are different types and ways to exercise leadership. This classification has been studied by a variety of authors. Daniel Goleman, Richard Boyatzis and Annie McKee, in their book "Primal Leadership", studied six distinct emotional leadership styles (Goleman, Boyatzis, McKee, 2002), which are:

- Visionary: leadership that coordinates the group members to work towards a vision. This approach provides optimal results when guidance or change is necessary.
- Coaching: leadership that develops and trains group members by encouraging them to improve their future. This approach provides optimal results when helping people grow on a long-term basis is necessary.
- Affiliative: leadership that links group members through emotions and harmony, creating strong bonds among them. This approach provides optimal results when it is necessary to mend gaps in teams or motivate members.
- Democratic: leadership that tries to find agreement and consensus by involving group members and creating a favorable environment to participate so their voices can be heard. This approach provides optimal results when creating consensus or getting insights is necessary.
- Pacesetting: leadership that sets high-standard steps in order to achieve excellence. This approach provides optimal results when getting quick results from a highly skilled team is necessary.
- Commanding: leadership that demands an action to be done and calls for immediate compliance. This approach provides optimal results in cases of crisis.

Each leadership style works differently with the aim to meet a goal and each one is suitable in different circumstances. The all-embracing condition that these three authors call attention to is emotion. Effective leaders are emotionally compelling and connect with their group members on a closer and more personal level, which results in a change in action and enhances engagement. (Greenleaf, 1998).



It can also be argued that values and integrity in leadership are needed in order to achieve group goals. To determine the values needed requires specificity. In some cases, values could even be dismissed. Nonetheless, one of the main reason's values are necessary is because the group members themselves often require it. For the Spanish and Portuguese Catholic Church, it is clear that it is essential for an effective leader to have values of faith that are shared within the religious community. These values can then be combined with emotions in order to lead.

In addition, in the Catholic Church there is another concept of leadership that is useful to analyze. Robert Greenleaf's servant-leadership is a popular theory among organizations that can be applied to this study. Servant-leadership is explained in the framework of two roles that are often seen as antithetical in our culture. There is the servant who, by acting with integrity and spirit, builds trust and lifts people up and helps them grow, and there is the leader who is trusted and who shapes others' destinies and leads by example (1970). The emphasis is on the combination of these two roles, which create an environment of trust and engagement while at the same time giving direction so the goals can be met.

Leadership involves direction, interaction, behavior and goals on a broader scale and specific emotions and values for each particular circumstance. If required, the practice of leading can also be combined with that of serving in order to be more effective in accomplishing the objectives.

Finally, it is important to consider the substantial association with authority in leadership. The status of leading implies a position of superiority in which an institution or an organization establishes hegemony within its domain, sector, or product. (Díez, Soukup, Micó, Zsupan-Jerome, 2017). This superiority is the power to direct and is an essential part of leadership.

In the Catholic Church, Paul A. Soukup S.J. relates the idea of *soft authority*. He explains that soft authority in religious groups may depend more on personal charisma, professional qualifications, individual knowledge, the practice of ministry, and personal witnesses (2017). To this he adds that authority not only depends on who has a position of authority, but on who has a voice, the ways in which people craft messages, the ways in which those messages fit into the environment, the frequency of relaying messages, and horizontal communication, which is how people interact with those around them, independently of how they interact with those at higher levels within the organization (Soukup, 2017). In this regard, the idea of directive power, whether it is authority, soft authority or leadership, must be accompanied by effective techniques of a leader.

Ultimately, authority in churches and religions is deeply connected with the kind of leadership used (Scharer, 2017) and engagement and directness highly depends on the practice of leading.

1.3. The Digital Approach

As mentioned earlier, the Covid-19 pandemic brought uncertainty and ambiguity, which are circumstances in which leadership has become necessary for guidance and directing.



Moreover, the pandemic regulations called for solutions to counterbalance the prohibition of gatherings and the closing of churches. As a result, technology and digital tools have been seen as a new way to interact and gather. Hence, religion has adapted to the pandemic in innovative ways (Campbell, 2020).

The role of communication is a core area in the matter. The challenges that this digital culture (Campbell, 2020, Hoover, 2016) brings to new leaderships and a redefinition of the concept of authority are very present in this study. The authority ascribed in digital practice is one earned in the process of interaction on specific topics or issues, a type of authority that is more common in oral-dominant communities than in the aloof, institution-based authority that most churches have carried into the third millennium (Horsfield, 2015). This actively demonstrates that, although leadership is needed in the current times, the digital world might become an obstacle in terms of the challenges the leader and the group face with interaction and perception.

1.4. Purpose and Objectives

These terms cause a critical question to emerge. Who are the Catholic figures that are leading in Spain and Portugal? In other words, who are the leaders of the Catholic Church in these two countries and how are they promoting their values? The concept inferred by these questions constitute both the genesis and the backbone of this study. Hence, the main objective is to better understand and map the formation of religious leadership in Spain and Portugal in order to detect initiatives and identify current necessities in the matter of leadership and recognize how they affect communication.

This serves as an initial exploration on the specific field of leadership in Catholic communities within Spain and Portugal. The purpose, therefore, of this study is an initial approach for further research on the topic.

An additional aspect of the study regards the impact of Covid-19 and the consequent pandemic and lockdown. As a necessity, has Catholic leadership been able to adapt to the digital world? This is also a topic of further research.

2. Design and Method

The design and method selected and developed for this study were chosen because this study is exploratory. Leadership initiatives that may be used to enhance communication with Catholic believers in Spain and Portugal is a premise that is introduced in order to be tested. As explained in the purpose and objectives, this study is a way to analyze and identify the current state of the issue in order to become the focus of further research.

The formal object to be studied is the leadership scenario of the Catholic Church within the Iberian Peninsula of Spain and Portugal. This phenomenon includes leadership initiatives, leadership formation courses and a variety of different leadership practices, some of them related to communication, management, and even coaching. These aid in understanding what is being done and where efforts are allocated in religious leadership.

A limited field of study was designed in order to provide clarity for the research. The groups researched were divided into the existing dioceses of Spain and Portugal. For



practical purposes, the territories were divided into smaller regions according to the jurisdiction of specific bishops. Spain has 70 dioceses and Portugal has 20. Hence, the study used these as a source of knowledge and included related organizations such as universities and foundations. The study began in August 2020 and finished five months later in December.

In order to gain the explanatory knowledge needed for this study, a specific methodology was used. The development stage, or phase zero, required a thorough and comprehensive understanding of the field of leadership itself and religion. A literature review was carried out and was a main contributor to the study. This stage was highly important to acquire the necessary underlying knowledge for the other methodological stages to be built upon. With this as the base, a three-step process followed. It began with a netnography (Kozinets, 2010) to objectively map and list existing leadership related initiatives of Spanish and Portuguese dioceses and similar organizations that could be found online. This provided a general idea on what is being done. Secondly, quantitative data was compiled using a survey that was sent to all 90 dioceses and related organizations found in the netnography. This survey was translated into Spanish and Portuguese. Thirdly, it ended with a qualitative analysis with 21 individual interviews and two focus groups, one for each country and language.

3. Field Work and Data Analysis

The field work commenced with a literature review on leadership. The main authors and publications analyzed were, Bernard Bass' "The Bass Handbook of Leadership: Theory, Research, and Management Applications" (Cambridge Free Press, 2008) and Robert House, Paul Hanges, Mansour Javidan, Peter Dorfman and Vipin Gupta's "Culture, Leadership, and Organizations: The GLOBE Study of 62 Societies" (Sage, 2004) were used to understand the concept of leadership. Daniel Goleman, Richard Boyatzis, and Annie McKee's "Primal Leadership" was used to comprehend different leadership styles and their connection to emotions. Robert Greenleaf's "The Servant as Leader" (Center for Applied Studies, 1970) provided a useful theory to apply to religious leadership. Míriam Díez, Paul Soukup, Josep Lluís Micó and Daniella Zsupan-Jerome's "Authority and Leadership. Values, Religion, Media" (Blanquerna Observatory, 2017) was helpful in grasping the foundation of authority in leadership. In addition, other authors and publications concerning the pandemic and religions moving into the digital world were examined. These included Heidi Campbell's "Digital Creatives and the Rethinking of Religious Authority" (Routledge, 2021), David Hoover's "The Media and Religious Authority" (Penn State Press, 2016) and Peter Horsfield's "From Jesus to the Internet: A History of Christianity and Media" (Wiley-Blackwell, 2015). These served to gain the base knowledge explained in the introduction and aided in creating the survey and conducting the interviews.

To map the scenario of what is being done in terms of leadership, a list of initiatives was compiled through netnographic research. The list shows the initiatives found along with information regarding their typology, whether they were formation courses, publications, spiritual retreats, personal accompaniment actions or others, how there are implemented, offline or online, pre or post Covid-19 as well as other relevant information including which dioceses or organization carried out the initiative. All in all, 285 initiatives



from Spain and 33 from Portugal were compiled. It is important to note that all initiatives that were somehow related to leadership were included.

For the quantitative survey, the questions used related to the existence of leadership formation initiatives, the skills required to be a good religious leader and the type of leadership needed in the Spanish and Portuguese Catholic Church. For this last question, it was useful to refer to Daniel Goleman, Richard Boyatzis, and Annie McKee's description of leadership styles, which have a different effect on people's emotions. These styles are visionary, coaching, affiliative, democratic, pacesetter, and commanding (Goleman, Boyatzis, McKee, 2002). Moreover, other questions focused on the reality of each survey-taker in his or her organization, together with personal opinions and perceptions. It is important to understand that the survey included both open and closed questions. This gave the survey-takers the opportunity to give their opinions and explain and clarify their answers, as well as their doubts when it was considered relevant.

All Spanish and Portuguese dioceses were contacted and each was given the survey in their respective language. In addition to these 90 entities, other related organizations that provide leadership initiatives found in the netnography were contacted as well. Close to 100 surveys were sent and 58 completed surveys were received: 31 from Spain and 27 from Portugal.

For the qualitative approach, interviews of 10 relevant actors in the field of leadership and religion who are impacting and contributing to the growth of leadership were planned. There were five interviews from Spain and five from Portugal. In light of the small amount of completed surveys received, the total number of interviews increased from 10 to 21, 12 from Spain and 9 from Portugal. These personal encounters provided in-depth and more developed answers to similar questions from our initial survey. The people interviewed are representatives from exemplary dioceses in terms of leadership formation, institutes and universities that motivate the knowledge and practice in the field as well as members from related foundations and key institutions in the religious scenario in both countries. Contributing to this, two focus groups were created with 11 people from Spain and 8 from Portugal. Some of the people in the focus groups had previously been interviewed individually. This was done as a way to discuss the topic simultaneously and in conjunction. The flow of the discussion brought critical topics to the table such as the concept that should be used to address leadership in the Church, the type of leadership needed in the Spanish and Portuguese Catholic Church, how this should take place, and the opportunities that this type of leadership represents.

4. Results

This study has provided key results that should be taken into consideration in order to understand the final conclusions of the research.

On the one hand, within the Spanish context and in terms of the survey, the initial element to understand is that the 73.3% of the organizations that answered the survey affirm conducting leadership initiatives, as opposed to a 26.7% who admit they do not. Of these, the most widely used style of initiatives are formations, occasional conferences or talks, retreats, and international experiences, which are listed in order of popularity. Concerning fundamental concepts, most survey takers agree that the style of leadership



necessary for the Spanish Catholic Church is a visionary one, closely followed by affiliative, democratic, and coaching. It is important to note that nobody thought that authoritative leadership is necessary. The skills most valued in a leader are communication skills, with 70%, the capacity to influence, inspire and motivate, with a 60%, conflict management, with 53.3%, and the capacity to establish goals, with 50%. The other proposed skills, which included resilience, personal knowledge, innovation, assertiveness, and result-orientation received lesser percentages, between 16.7% and 10%. Addressing the issue of Covid-19, 90% of the organizations believe that new leadership initiatives are necessary in times of crisis and gave the pandemic as an example.

Within the Portuguese context, the survey explained similar results. 70.4% of the respondents affirmed to conducting leadership initiatives within their organization. The most used are formations and occasional conferences or talks. Concerning leadership styles that the Portuguese Catholic Church ought to follow, the most popular one was affiliative, followed by visionary, democratic, and coaching. Again, none of the survey takers thought that an authoritative approach to leadership is necessary. Concerning the figure of a leader, the skills necessary to be an effective leader were said to be communication skills, with 81.5%, the capacity to influence, inspire and motivate, with 66.7%, the ability to innovate, with 40%, conflict management skills, with 37% and the capacity to establish goals, with 33%. This order appears to be the same as the Spanish survey results. Nonetheless, for Portuguese respondents, innovation is a skill perceived as being more necessary. Addressing the issue of Covid-19, a similar percentage thought that leadership initiatives are necessary in times of crisis, such as the pandemic. 81.5% of organizations believed this to be true.

Qualitative research results were collected using best practices examples. The institutions that are carrying out best practices in terms of development, encouragement and promotion of religious leadership in the Iberian Peninsula include dioceses and relevant religious organizations. They are:

- Diocese of Solsona, in Spain. This is a great example of constant leadership formation. Autem is the name of the program that this diocese is putting forward for the third consecutive year. It was conceived with two principles, that the parish needs transformation and that priests need to be ready to lead. This program forms leadership and teambuilding within the framework of the 21st century.
- Diocese of Leiria-Fátima, in Portugal. This diocese serves as another example of the importance of leadership formation within the Portuguese Catholic Church. Particularly, its school Razões de Esperança, offers a course that combines fundamental dimensions of the faith with enabling the performance of pastoral agents.
- The organization Pastores Gregis Christi, in Spain. They offer a course in leadership for priests who want to transform their parish. The course is taught by pastoral experts, psychologists, coaches, direction consultants and a priest. It offers four modules of formation as well as parallel personal accompaniment for the participants.
- The Management and Leadership for Ecclesiastic Forepeople Program, in Portugal. This is a program conducted collaboratively by the Portuguese Catholic University and the Lisbon Catholic School of Business and Economics. Its main objective is to develop leadership practices for the entities that are responsible for the functioning of the



Catholic Church in Portugal by stimulating entrepreneurial attitudes and improving the use of digital communication technologies. They also focus on team building, among other skills. This formation is for bishops, administrators, religious institutes, Catholic schools and other related groups.

- The group Alpha, in both countries. They are present around the world and focus on organizing sessions to discuss the fundamentals of Christian faith in a welcoming and deliberative way. They gather together those who are curious into a specific community and put them into what they call "Alpha Teams."

5. Conclusions and Discussion

First and foremost, this study found that the concept of leadership has a wide meaning. Although some organizations had a clear idea and a pre-existing focus on leadership formation, the research team had to be specific and reiterate the logics of leadership in religious organizations in order to approach and establish two-way conversations. This was useful to understand the situation of leadership in religious organizations in Spain and Portugal and was an initial approach to the final conclusion that there is still a lot to learn about the importance or benefits of leadership.

Further conclusions show that it is useful to divide them into challenges and proposals. Regarding challenges, when having to implement leadership initiatives, we have found that the main obstacle is the lack of time and the lack of internal and institutional coordination. These two aspects could also be related to the lack of clarity in the concept of leadership within religion. Moreover, the lack of human resources and investment are two other challenges that, although not as persistent as the aforementioned, should be considered as well.

Skepticism plays a role against leadership formation, which poses another challenge. Although there is skepticism, it cannot be denied that some organizations are pushing forward leadership formation and developing the leadership in Spain. For this reason, the last challenge relates to the two opposite realities that there is inequality in these initiatives. First of all, there is an evident inequality within organizations, as some assemble and are known for their trust in leadership and others look at it with skepticism. Secondly, there is also inequality within initiatives that should be considered and, although we measure initiatives in general, some are solid and consistent programs as opposed to others that are occasional, sporadic and infrequent. Additionally, a great majority of the respondents agree that leadership is necessary in times of crisis, however, this statement shows that, although the respondents are in agreement, only some initiatives are considered consistent and impactful.

To address these challenges in a general way, a study should be carried out that focuses on clarifying the concept of leadership, on investing and communicating ecclesiastic leadership, on improving human and spiritual formation, on improving time management, vision and coordination, and on uniting in action and accepting and being conscious of the fact that contributions of leadership do not go against the gospel and the faith. In addition, for in-depth proposals related to Covid-19, the proposed initiatives should focus on sharing experiences and reflections, as well as how to manage the mourning phase, accompaniment initiatives, conflict resolution, crisis management, the



capacity to create enthusiasm, the renovation and innovation of the service vocation, or to take advantage and make the most out of this situation, to name some examples.

All in all, it is not that Catholic communities in Spain and Portugal are not engaging in leadership practices, however, there is room for improvement. As a new field, concepts should be introduced that emphasize the positive impact of this practice. Moreover, it is important to remember that leadership formation is indeed something that exists and, therefore, can be taught and learned through various means. The initiatives that have already actively implemented leadership, demonstrate useful results for their participants. They understand that proper leadership can improve the relationship between the members of these religious communities and increase communication and engagement.

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