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**Determinants of roles and competences of an HR Business Partner**

DOCTORAL DISSERTATION ABSTRACT

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Wrocław 2022

A clear change in the direction of development of human resource management theory has been observed for years. The progressing social and economic changes have significantly influenced the approach to shaping human capital in enterprises. The approach to achieving business goals has also undergone change. The popularization of the idea of social responsibility, advancing so dynamically these days, make companies consider new variables in their business strategies, including, among others, the transformation of organizational culture, new expectations of employees, new career paths or efforts to flatten organizational structures. In response to these changes, companies look for new solutions for the implementation of strategies and the development of human capital. According to D. Ulrich these social and business changes have proven the previous activities in the area of HR in the traditional sense insufficient<sup>1</sup>. Also M. Khan points out that the changes have increased and redefined the catalogue of competences of HR specialists. Due to the high importance of the new processes for business, the administrative competences of HR turn out to be inadequate<sup>2</sup>. Hence the need to develop new strategic competences in HR departments and create new positions of HR Business Partners (hereinafter referred to as HR BP) in enterprises. According to the definition by D. Ulrich and W. Brockbank, HR BP is a professional in the area of HR, closely cooperating with the managerial staff in the implementation of business strategy and designing HR processes, facilitating the achievement of business goals<sup>3</sup>. E. Beck-Krala points out that the classic HR BP model is the one presented by D. Ulrich in 1997, which distinguishes four basic roles: firstly, an administrative expert who designs analytical systems and tools and strengthens social networks; secondly, an employees' advocate, employee champion who helps employees build and maintain effective social relationships; the third role is a change agent, who facilitates the transformation of the organization; the fourth role is a strategic partner who supports building the organization's competitive advantage through HR<sup>4</sup>.

Based on the conducted study of domestic and foreign literature on the subject a research gap was identified in the area of determinants of roles and HR BP competences in relation to the roles. Filling this gap allowed to specify the aim of this paper, which is **to assess the impact**

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<sup>1</sup> Brockbank W., Ulrich D., *The HR business-partner model: past learnings and future challenges*, People & Strategy, Human Resource Planning Society, 32 (2), 2009, p. 4.

<sup>2</sup> Khan M. S. M., Mushtaq U., *Evolution of strategic role organization's human resource management: an overview*. Journal of Business and Economics, 7 (2), 2015, p. 192-213.

<sup>3</sup> Brockbank W., Ulrich D., *The HR business-partner model: past learnings and future challenges*, op. cit., p. 4.

<sup>4</sup> Beck-Krala E., *Rola HR Business Partnera w procesie kreowania wartości dla kluczowych interesariuszy organizacji: słownik pojęć ZZL*, Zarządzanie Zasobami Ludzkimi, Instytut Pracy i Spraw Socjalnych, 5/2021, str. 151. (*The role of HR Business Partner in the process of creating value for key stakeholders of the organization*): glossary of terms in HRM, Human Resources Management, Institute of Labor and Social Affairs, 5/2021, p. 151

**of factors from the external and internal environments of the company on the roles of HR BP and to indicate the competences necessary for the delivery of HR BP roles.** The research problem in the paper was formulated as follows: **what is the impact of internal and external factors of the company on the roles of HR BP and what competences are the most important for the delivery of individual HR BP roles?**

The first detailed objective of the paper concerns the influence of specific internal and external factors such as: business strategy, position of the HR area in the organizational structure, organizational culture, development phase of the organization, current situation in the labor market, stakeholders' expectations, competitors' activity, nature of a business activity and the enterprise sector on the roles of HR BP. The influence of these factors was discussed, among others, by G. Dessler, J. Griffiths and B. Lloyd-Walker; C. J. Collins; E. E. Lawler III and J. Boudreau; D. Bowen and E. Ostroff; M. McCracken, P. O'Kane, T.C. Brown and M. McCrory

The second detailed objective assumes the analysis of the significance of specific competences for the delivery of individual HR BP roles. Based on the study of literature, a list of competences was developed, which was then assessed by respondents. The list comprised: business orientation, communication, flexibility and openness to change, strategic thinking, conflict solving, influencing, negotiations, relationship building, analytical thinking, customer orientation, emotional intelligence, business acumen and goal orientation. Knowledge in the field of human resources management and knowledge of labor law issues were also taken into account. The development of such competences was pointed out, among others, by D. Ulrich; K. Lo and K. Macky; C. S. Long, W. K. Wan Ismail and S.M. Amin; E. E. Lawler III and A.M. Mohrman

The first chapter introduces the subject of human capital management. The chapter lists key social and economic changes that significantly influenced the approach to shaping human capital in enterprises. It further defines the roots of developing HR as a business partner, showing, among other things, the subsequent phases of development of the HR area. HR processes in the enterprise and the roles of HR BP are also characterized, both in the classic approach i.e., strategic partner, change agent, employees' advocate and administrative expert as well as in other interpretations, showing, among others, changes in HR roles in relation to changes caused by the pandemic.

The concept of HR BP derives from the business practice in the United States, which developed in the 90's of the twentieth century and was defined by D. Ulrich. The classic model distinguishes the following four roles of HR BP: business (strategic) partner, change agent,

employees' advocate and administrative expert<sup>5</sup>. As part of the business partner function, also known as a strategic partner<sup>6</sup> the main task of HR BP is to adapt the HR strategy to the changing needs of the organization. HR BP identifies personnel risks in the company, understood here as a potential danger that arises as a result of improper use of human capital threatening the achievement of the company's goals<sup>7</sup>, designs structures supporting talent development and prioritizes HR needs. According to G. Filipowicz, the basic requirement for entering the role of a strategic partner is understanding and knowledge of business goals of the organizations<sup>8</sup>. In practice, this role is visible through HR participation in the strategic decision-making processes as well as operational management of the company. The task of HR BP is also to create personnel processes in the organization, as well as to take responsibility for personnel issues in projects planned in the company. HR as a change agent is the second of the discussed roles in the view of D. Ulrich. As part of it, HR BP co-leads the change management process in the organization, participates in change management teams, takes responsibility for communication of changes in the organization. In the event of organizational changes, HR BP performing this role, will carry out activities preparing employees to new working conditions, enabling the acquisition of skills and competences needed for the new post-change workplace. The agent will also constantly support employees in the change process, cope with their resistance and support managers in managing change. HR's role as an employees' advocate includes dealing with any kind of organizational or personnel barriers within the organization. As part of this role, HR BP primarily responds to employees' reports and manages conflicts between employees or between managers, sometimes acting as a mediator between the involved parties. Resolving possible disputes and misunderstandings, reacting in case of mistreatment of employees, dealing with unhealthy competition in a team are the main tasks of a negative meaning in this role. As an advocate of employees, HR BP also coordinates initiatives of a positive meaning, representing the interests of employees in the management process, responding to development needs, supporting managers in communication with employees or co-leading the processes of assessments and career paths development in the organization. HR BP's role as an administrative expert remains similar to that of HR in the traditional sense. As part of this role, HR implements basic

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<sup>5</sup> David Ulrich's HR Model, Creative HRM, <http://www.slideshare.net/CreativeHRM/david-ulrichs-hr-model>, accessed: 16.02.2020.

<sup>6</sup> *Ibidem*, str. 16.

<sup>7</sup> Lipka A., *Ryzyko personalne. Szanse i zagrożenia zarządzania zasobami ludzkimi (Personnel risk. Opportunities and threats to human resource management)*, Poltext, Warszawa, 2002, p. 24.

<sup>8</sup> Filipowicz G., *HR Business Partner. Koncepcja i praktyka (HR Business Partner. Concept and practice)*, Wolters Kluwer, Warszawa, 2019, p. 153.

personnel processes, starting from the selection of employees to join the organization, through their employment, adaptation process, training, development, up to the potential leaving of the organization. After years of four basic roles, D. Ulrich and a group of researchers have developed the concept of HR BP, defining not four, but six roles of HR BP (also called competences). These include: the Strategic Positioner, the Credible Activist, the Capability Builder, the Change Champion, the HR Innovator and Integrator, the Technology Proponent<sup>9</sup>. The literature review should form the basis for the selection of roles for the own research. Four basic roles were selected for further analysis. The D. Ulrich's new concept of six roles is not yet widely described in Polish literature on the subject. K. Chudzińska, who was one of the first to analyze the evolution of the HR BP model, emphasizes the importance of classic HR BP roles, in particular the role of the strategic business partner. She notices that the HR BP model is constantly evolving as researchers are constantly expanding it by adding new roles. She admits, however, that the reports she analyzed pay little attention to the credibility or authenticity of HR BP and the requirements related to coping with mutually exclusive or contradictory circumstances (these are the areas of new roles of HR BP: a reliable activist and a paradox navigator)<sup>10</sup>. On this basis, it was assumed that in business practice we talk about four roles rather than six. This, in turn, leads to the conclusion that the adoption of six roles at the literature review stage would probably lead to limiting the research field to four roles anyway, due to the lack of experience of six roles in the companies under research.

The second chapter indicates the broader context and conditions for human capital management and HR BP activities. It presents and describes factors that shape the internal and external environment of the company which determine the roles of HR BP. Studies of the literature on the subject should be the basis for the selection of these determinants, therefore, on their basis, the following factors were selected for further analysis and the own research: business strategy, whether it always translates into the roles of HR BP; positioning of the HR area in the organizational structure, i.e. in which part of the structure the HR division is located and whether the HR director is in the management board and influences the roles of HR BP; organizational culture, to what extent it determines the role of HR BP; the development phase of the organization, whether the role of HR BP depends on it; the existing situation in the labor market, whether it affects the roles of HR BP; stakeholder expectations, whether they are important for

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<sup>9</sup> Ulrich D., Brockbank W., Younger J., Ulrich M., *HR from the outside in: Six competencies for the future of human resources*, McGraw Hill Professional, 2012, p. 7-27.

<sup>10</sup> Chudzińska K., *Ewolucja modelu HR Business Partnera (Evolution of HR Business Partner model)*, *Marketing i Zarządzanie*, 1 (51), 2018, pp. 9-19.

BP HR roles; competitors' activities, whether they are important for HR BP roles. The nature of the business activity as well as the sector to which the company belongs can also influence HR BP roles. M. J. Hatch points out that priorities and internal structures are created under the influence of the requirements prevailing in a given industry<sup>11</sup>. Therefore, similar regularities can be expected in the field of HR activities, so these two factors will also be taken into account in the research.

The links between building HR BP roles and the company's development strategy are pointed out, among others, by G. Dessler, J. Griffiths and B. Lloyd-Walker<sup>12</sup>. The significance of business strategy was also emphasized by C. J. Collins, making the success of HR BP activities dependent on the knowledge, skills and attitude of the management staff and of the CEO in particular, who, by creating the company's strategy, has a direct impact on how human capital management theme is perceived in the company<sup>13</sup>. It is the CEO who sets direction and defines priorities for his managers, as well as communicates his expectations relating to the implementation of business goals, in line with the principles set out in the business strategy. If in his communication he constantly emphasizes the importance of human capital in the organization, HR BP will have much greater opportunities to act and build strategic cooperation with managers. As C. Rochford notes, linking HR strategy with business strategy is most often associated with setting up an HR BP position in the company<sup>14</sup>.

Organizational culture largely determines and describes the behavior of employees in the company. Therefore, it strongly conditions the HR activities. E. E. Lawler III and J. Boudreau emphasize the importance of organizational culture, arguing that the HR department is much more likely to be a strategic partner if the organizational culture in the company rests on knowledge and information<sup>15</sup>. M. McCracken also argues that the culture of an organization influences its ability to build a business partnership<sup>16</sup>. In every organization, culture takes on a unique character, defining the values, patterns of behavior and norms of a specific group of employees.

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<sup>11</sup> Hatch M. J., *Teoria organizacji (Theory of organizations)*, PWN, Warszawa, 2002, pp. 178-182.

<sup>12</sup> Dessler G., Griffiths J., Lloyd-Walker B., *Human resource management*, Frenchs Forest, Australia: Pearson Education Australia, 2007, p. 97-99.

<sup>13</sup> Collins C. J., *Expanding the resource-based view model of strategic human resource management*, The International Journal of Human Resource Management, 2020, p. 331-358.

<sup>14</sup> Rochford C., *Does the HR business partner model add value to the HR function, and does it assist in preparing organizations for the Fourth Industrial Revolution?* Submitted to the National College of Ireland, 2018, p. 11.

<sup>15</sup> Lawler E. E. III, Boudreau J., *What makes HR a strategic partner?* People + Strategy, 32 (1), 2009, p. 14-22.

<sup>16</sup> McCracken M., O'Kane P., Brown T. C., McCrory M., *Human resource business partner lifecycle model: exploring how the relationship between HRBPs and their line manager partners evolve*, Human Resource Management Journal, 27 (1), 2006, p. 58-74.

Another factor that shapes the HR roles is the existing development phase of the organization. At each stage of development, the organization faces different challenges, different processes gain in importance and the organization itself may adhere to different goals and mission. The development of the organization is accompanied by the parallel development of employees and management staff. The changes taking place significantly influence the functioning of the organization and also the activities of HR BP, in particular in the context of developing business orientation. The literature on the subject provides many classifications concerning the life cycle or phases of development of the organization. Among the first is the theory developed by L.E.Greiner, which distinguishes five phases of development each preceded by crisis which the organization passes<sup>17</sup>. Each crisis brings about changes in the company's functioning, which is why the role of HR BP as a change agent will be particularly important. Going through the next phases of development requires change management competencies.

The labor market in classical terms is defined as the relationship between the demand for labor and the supply of labor. Demand in the labor market is understood as the number of jobs, while supply is represented by labor resources<sup>18</sup>. B. Czarniawska refers to the definition of the labor market, in which the organization acts as one of the actors shaping the market's specific character and the definition where employers and employees operate within the labor market, which functions independently of their activity and deeds<sup>19</sup>. With this assumption, the labor market becomes an important factor that affects and influences the external environment of the organization.

Expectations of stakeholders and groups involved in corporate social responsibility form another factor that can impact the external environment of the organization. Stakeholders are groups or entities that are directly or indirectly involved, or even dependent on, the activities of the enterprise, or that may be affected by the activity<sup>20</sup>. One of the theories highlights the division into first-level stakeholders, i.e., the individuals who have a direct or indirect relationship with the company, persons entering into formal contracts, agreements or deals, and second-

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<sup>17</sup> Greiner L. E., *Evolution and Revolution as Organizations Grow: A company's past has clues for management that are critical to future success*, Family Business Review, 10 (4), 1997, p. 397-409.

<sup>18</sup> Balcerowicz-Szkutnik M., Dyduch M., Szkutnik M., *Wybrane modele i analizy rynku pracy. Uwarunkowania rynku pracy i wzrostu gospodarczego (Selected models and analysis of labour market, Conditions for labour market and economic growth)*, Uniwersytet Ekonomiczny, Katowice 2010, str. 16

<sup>19</sup> Czarniawska B., *Trochę inna teoria organizacji. Organizowanie jako konstrukcja sieci działań. (Slightly different theory of organizations. Organization as an activity network structure.)*, Poltext, Warszawa, 2010, str. 16.

<sup>20</sup> Klineciewicz K., *Problemy w relacjach przedsiębiorstwa z interesariuszami (Problems in relations between an enterprise and the stakeholders)*, [w:] Bernatt M., Bogdaniecki J., Skoczny T. (red.), *Společna odpowiedzialność biznesu. Krytyczna analiza (Social responsibility of a business. Critical analysis)*, Wydawnictwo Naukowe Wydziału Zarządzania Uniwersytetu Warszawskiego, Warszawa, 2011, str. 89.

level stakeholders i.e., the individuals who can influence or be influenced by the company without being in a direct dependence relationship<sup>21</sup>. Among the methods for analyzing stakeholders of an organization is a matrix of the power of influence on the activities of the organization in connection with the degree of interest in its activities, called the Mendelov matrix, which assumes the division of stakeholders into four groups<sup>22</sup>.

Competitors' activities form another important factor that can affect and influence the external as well as the internal environment of the company. In the context of competitors' activities, it is particularly important for HR to build the employer's image. M. Kozłowski defines employer branding as "all activities undertaken by the organization, addressed to current and potential employees, aimed at building its image as an attractive employer, as well as supporting its strategic business goals"<sup>23</sup>. Such a perspective of building the company's image as an employer is closely related to the strategic role of HR BP, whose one of the main goals is to undertake HR activities supporting the implementation of business goals. Thus, the role of HR BP may change depending on the intensity of employer branding activities.

The third chapter examines the essence of competences, competences in the HR area, as well as the competence profile of HR BP. The development of business partnership in the area of HR, as well as subsequent phases of its development contributed to changes in the required competences. Also due to the rapidly changing business environment, the role of HR practitioners has developed significantly, and HR competences have become very important determinant of the company's success. HR departments began to be required to actively participate in the strategic development of the organizations. M. S.M. Khan and U. Mushtaq argue that due to the high business importance of new HR processes, administrative HR competences were no longer sufficient<sup>24</sup>. C.K. Wai, R. Sagadavan, T.S. Teck, A.H.H. Ng, W.C. Hoo and T.H. Sam also point out that the new strategic role requires HR practitioners to acquire new competencies

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<sup>21</sup> Freeman R. E., Harrison J. S., Wicks A. C., Parmar B. L., de Colle S., *Stakeholder Theory: The State of the Art*, Cambridge University Press, 2010, p. 22.

<sup>22</sup> Marcinkowska M., *Tworzenie wartości przedsiębiorstwa dla interesariuszy (Creating company's value for stakeholders)*, Zeszyty Naukowe Uniwersytetu Szczecińskiego nr 639, Finanse, Rynki Finansowe, Ubezpieczenia nr 37, Wydawnictwo Naukowe Uniwersytetu Szczecińskiego, Szczecin, 2011, str. 855–870.

<sup>23</sup> Kozłowski M., *Employer branding. Budowanie wizerunku pracodawcy krok po kroku (Employer branding. Building employer's image step-by-step)*, Wolters Kluwer, Warszawa, 2012, str. 13.

<sup>24</sup> Khan M. S. M., Mushtaq U., *Evolution of strategic role organization's human resource management: an overview*, op. cit., p. 192-213.

in the field of business partnership, especially since the level of HR competence has a decisive impact on stakeholders, business results, or the overall effectiveness of HR activities<sup>25</sup>.

In the classic model, HR BP performs four roles: business partner (strategic), change agent, employees' advocate and administrative expert. The implementation of various HR tasks may require different HR competences, which may change depending on the roles performed. C. Long and W. K. Ismail in their research on the competences and roles of HR specialists, checked to what extent and how given competences relate to the most important HR roles<sup>26</sup>. HR BP roles may therefore require similar competencies, but many authors focus on the competencies necessary to fulfill individual roles<sup>27</sup>.

F. Buckley and K. Monk argue that strategic partner and change agent are strategic roles, and that administrative expert and employees' advocate are operational and functional roles<sup>28</sup>. The distinction between functional and strategic HR competences, and thus appropriate for individual roles, were analyzed, among others, by K. Lo and K. Macky<sup>29</sup>. They point out that in the case of the strategic role of HR the business orientation competence is most important, due to the fact that the main stakeholders in this case are senior management, as opposed to functional HR, for which the main stakeholders are most often employees and line managers.

Competences important for the role of a change agent were analyzed by D. Buchanan and D. A. Boddy, among others, emphasizing the importance of communication skills, team building, setting clearly defined goals, as well as exerting influence<sup>30</sup>. L. Panayotopoulou and N. Papalexandris emphasize that the role of a change agent is related to analytical skills, the ability to make changes in the organization, as well as the ability to consult and facilitate<sup>31</sup>. E.E. Lawler

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<sup>25</sup> Wai C. K., Sagadavan R., Teck T. S., Ng A. H. H., Hoo W. C., Sam T. H., *Measuring Human Resource Competencies, towards Effective Business Partnering, A Proposed Framework*, International Journal of Academic Research in Business and Social Sciences, 11 (3), 2021, p. 1132-1142.

<sup>26</sup> Long C. S., Wan Ismail W. K., *Understanding the relationship of HR competencies & roles of Malaysian human resource professionals*. European Journal of Social Sciences, 7, 2008, p. 88-103.

<sup>27</sup> Kopertyńska M. W., Dernowska N., *Kompetencje HR biznes partnera w odniesieniu do ról pełnionych w organizacji (HR Business Partner's competence in relation to the roles in the organisation)*, Zarządzanie Zasobami Ludzkimi, Instytut Pracy i Spraw Socjalnych, 5/2021, str. 23-43.

<sup>28</sup> Buckley F., Monks K., *The implications of meta-qualities for HR roles*, Human Resources Management Journal, 14 (4), 2004, p. 43.

<sup>29</sup> Lo K., Macky K., Pio E., *The HR competency requirements for strategic and functional HR practitioners*, The International Journal of Human Resource Management, 26 (18), 2015, p. 2308-2328.

<sup>30</sup> Long C. S., Wan Ismail W. K., Amin S. M., *The role of change agent as mediator in the relationship between HR competencies and organizational performance*, The International Journal of Human Resource Management, 24 (10), 2013, p. 2019-2033.

<sup>31</sup> Panayotopoulou, L., Papalexandris, N., *Examining the Link Between Human Resource Management Orientation and Organizational Performance*, Personnel Review, 33, 5/6, 2004, p. 499-520.

III and A.M. Mohrman point out that in the role of a change agent, it is important to understand business strategy and know how to support its implementation<sup>32</sup>.

K. Lo and K. Macky also emphasize the importance of individual characteristics and behavioral competencies in HR, which seem to be most important in employee's advocacy role. These include communication, empathy, conflicts solving and integrity – important from the point of view of building trust among managers and employees. The authors also draw attention to the high importance of the competence to strategically exert influence and build relationships, primarily in terms of the mediation role of HR and reconciling different points of view, sometimes even conflicting interests of different stakeholder groups, which is associated with the employee's advocate role.

The fourth chapter primarily defines the applied method of scientific research. It indicates how the data was collected and what methods were used to generate data. The main part of the chapter deals with the results of research conducted among selected enterprises. It contains the outcome of the conducted research, as well as the relationship of the results in relation to previous studies. It shows that the results are mainly consistent with previous studies, although due to the new perspective of the discussed problem, additional results were obtained in the course of the research, which had not been defined before. The chapter also contains the directions of development of HR BP roles and competences defined on the basis of the conducted research. The conclusion part summarizes the results of the research, and also proposes managerial implications, with an indication of what managers can do based on the results obtained and what effects they may expect if they decide to introduce certain activities in their enterprises. Ultimately, limitations for the conducted research are indicated, as well as suggestions for similar studies in the future.

The research objectives should determine the research method<sup>33</sup>. The resolving of the indicated research problem and finding answers to the research questions asked in the goal of the paper require the application of a qualitative research method. The justification for its application can be traced in the work of W. Czakon and B. Glinka, who indicate that qualitative research seeks to determine the meaning or the sense of a given phenomenon, and not to measure its frequency<sup>34</sup>. As a rule, through the interpretation of the understanding of certain phenomena

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<sup>32</sup> *Ibidem*.

<sup>33</sup> Buchelt B., *Koncepcja systemu zarządzania efektywnością pracy personelu medycznego w szpitalach, (Concept of a management system for improving work efficiency of medical staff in hospitals)*, Wydawnictwo Uniwersytetu Ekonomicznego w Krakowie, Kraków, 2017, str. 201.

<sup>34</sup> Czakon W., Glinka B., *Podstawy badań jakościowych (Basics of quality research)*, Polskie Wydawnictwo Ekonomiczne, Warszawa, 2021, str. 16.

by the participants, it is possible to fully understand them. Qualitative research is valuable because it contributes to the development of knowledge, mainly due to the fact that it performs the function of describing phenomena. To sum up, considering the above-mentioned recommendations and the fact that the main goal of qualitative research (including multiple case studies) is to learn about the circumstances of the occurrence of phenomena, discover their causes and the direction of the relationship between them<sup>35</sup>, it was justified to apply qualitative methods in this work. Thus, the determinants of roles and the required competences for these HR BP roles in selected companies were examined using case study research. In order to find answers to the questions posed in the goal of the work, multiple case studies were carried out in twenty enterprises. In the case when it is important in the research to obtain information about the opinions and beliefs of respondents on specific topics (about how they evaluate them, what they know or would like to know about them), a survey is used. Its basic function is to collect information about problems of interest to the researcher as a result of verbal reports from individuals referred to as respondents<sup>36</sup>. Questions asked to respondents are valid. Answers to questions can be written – then we are talking about the form of a survey or can be expressed verbally and recorded in the form of an interview<sup>37</sup>.

In order to deliver the first detailed objective, which concerned the impact of specific factors on HR BP roles, a partly-structured interview questionnaire was used. This was done to obtain information from respondents during conversations about the roles of HR BP in the companies they work for. However, in order to deliver the second detailed goal i.e., to analyze the competences necessary for the implementation of individual HR BP roles, another partly-structured interview questionnaire was used and also a diagnostic survey using a survey questionnaire together with a focused group interview. Such a selection was made in order to be able to find answers to the questions posed, drawing on the experience of B. Buchelt, who pointed to the advantages of this type of interviews. The author emphasized, among other, the role of interviews conducted in the study (the possibility of obtaining the so-called dense description and a confirmation of existing practices), as well as the nature of the subject of research (in the context of deepening knowledge about given issues)<sup>38</sup>.

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<sup>35</sup> Patton M., *Quality in qualitative research: methodological principles and recent developments*, „Journal of the American Educational Research Association”, Chicago, 1985, p. 1.

<sup>36</sup> Łobocki M., *Metody i techniki badań pedagogicznych (Methods and techniques in pedagogical research)*, Oficyna Wydawnicza „Impuls”, Kraków, 2000 str. 243-272.

<sup>37</sup> *Ibidem*.

<sup>38</sup> Buchelt B., *Koncepcja systemu zarządzania efektywnością pracy personelu medycznego w szpitalach (Concept of a management system for improving work efficiency of medical staff in hospitals)*, op. cit., str. 208.

The questionnaire of the partly-structured interview was divided into sections, placing in turn information on the date and place of the interview, the name and surname of the respondent, the position. The respondents' experience was also analyzed, indicating the years of employment: in the area of HR, in the position of HR BP. One of the sections included questions about the scope of tasks in the position of HR BP in the company under research. Respondents defined the tasks they perform and the roles they play in the surveyed companies. Next, the respondents evaluated factors which determine the roles of HR BP, as well as the competences of HR BP for individual roles. In order to diagnose the impact of internal and external environment factors on the roles of HR BP, respondents were asked to assess the impact of a given factor on a five-point scale, where 1 means that a given factor definitely has no influence, 2 – rather has no impact, 3 –no opinion (neutral influence), 4 – rather has an impact, 5 – definitely has an impact. Attempts were made to choose a scale that does not leave any freedom of interpretation. Respondents had the opportunity to justify their answer in a further conversation. Based on the above partly-structured questionnaire, an individual interview was conducted with each respondent.

The components of competences, indicated through the literature revision, were evaluated in the part of the research on HR BP competences. The development of these components of competences was pointed out, among others, by D. Ulrich; K. Lo and K. Macky; C. S. Long, W. K. Wan Ismail, and S.M. Amin; or E. E. Lawler III and A.M. Mohrman. In order to analyze the importance of individual components of competences for the implementation of four HR BP roles, respondents were asked to assess their importance for the implementation of a given HR BP role, on a five-point scale, where 1 means that a given component of competence is definitely irrelevant for a given role, 2 – rather irrelevant, 3 – no opinion (neutral impact), 4 – rather important, 5 – definitely important. In addition, respondents had the opportunity to answer open questions about other HR BP competences relevant to them and the future competences in this area.

Obtaining respondents for the survey assumed direct contact with potentially interested individuals. For this purpose, HR BP, HR managers and HR directors were contacted via LinkedIn, who were identified by analyzing the course of their professional careers. The invitation to participate in the research included a summary of the scope of the research. This was to ensure a proper understanding of the substantive area of the research, and to give the participants opportunity to make a conscious decision whether they have relevant - in their opinion - knowledge and experience that they could share. The survey was also promoted among members of the Lower Silesian HR Forum, the Polish HR Business Partner Association and through

thematic forums, associating people interested in development in the HR area. The research was presented as one of the initiatives for the effective implementation, development and strengthening of roles and competences of HR BP's. The individuals who participated in a partly-structured interviews included: two HR directors, one HR manager and seventeen HR BP's. Moreover, in order to enrich the research on HR BP competences, a focus group interview as well as a diagnostic survey using a survey-questionnaire were conducted at the meeting which was part of the project implemented by the Polish Human Resources Management Association. The meeting was organized for HR department employees. During the dedicated meeting, a discussion was held according to a previously prepared scenario which assumed a discussion about the competences necessary to implement individual HR BP roles. It was indicated that the survey should be attended by people in HR BP positions (or managing such persons) who have knowledge and experience in the area of HR BP roles. Prior to the start of the relevant research, pilot research was carried out in three companies, which enabled validation of questionnaires to be used in interviews. Due to the pandemic related restrictions, the interviews were conducted remotely, using Microsoft Teams or Skype for Business. Research on HR BP roles was conducted between 04.2020 and 06.2020. Additional research on HR BP competencies relevant to the four HR BP roles was conducted between 05.2021 and 06.2021.

To sum up the characteristics of enterprises according to the positioning of the HR area in the organizational structure:

1. In the majority of companies (in seventeen companies surveyed), the HR area is positioned in the management board division, in two cases in the general director's division and in one case – in the finance and administration division.
2. In five surveyed companies, the person responsible for the HR area is a member of the management board.

To sum up the characteristics of enterprises according to the roots of setting up HR BP position, it should be indicated that:

1. The HR BP position was set up in the organization in line with the vision of functioning of the HR area by a newly hired person put in charge of the personnel policy – a director or an HR manager. This factor was diagnosed in five surveyed companies.
2. Another factor causing the creation of the HR BP position was the need to support the management staff in personnel processes (in two companies).
3. One of the reasons for creating the HR BP position was also the need to provide support for managers in HR processes for locations operating far from the headquarters i.e., in the case

when the organization is territorially dispersed or has a network character. Such a factor was diagnosed in two companies.

4. The transfer of solutions used in headquarters (primarily in international enterprises) or the decision of the headquarters related to the newly adopted HR strategy - was the reason for creating HR BP positions in five companies.
5. Development needs in the area of HR (the next stage on the HR development path), in three companies.
6. Trends in the labour market, in the energy sector company, where the HR BP position was created in parallel in all companies in the group.

While characterizing the surveyed enterprises according to the HR area, the summary should indicate that this area is organized as a section, a department or a division gathering:

1. a team of people in HR BP positions who carry out their tasks with the support of a team of HR specialists or an external company (as a shared services center or as part of outsourcing); such a solution occurred in ten surveyed companies,
2. a team of people in which a group of employees plays the role of HR BP, and another forms a group of HR specialists (in nine companies),
3. a team of HR BP role holders; a person in the position of HR BP has his own team (such a solution occurred in one food sector service company).

As mentioned earlier, in the classic HR model, BP performs four basic roles: business partner (strategic), change agent, employees' advocate and administrative expert. These roles are carried out by HR BP, who, as indicated earlier according to the definition by D. Ulrich and W. Brockbank, is a professional in the field of HR, closely cooperating with the managerial staff in the implementation of business strategy and designing HR processes, facilitating the achievement of business goals. The own research aimed primarily to determine the list of tasks carried out within each of the roles.

As a result of the research, it was established that the most developed roles of HR BP, determined by the percentage (%) scope of tasks performed, include the strategic partner, change agent and administrative expert. Sometimes the employees' advocate appears as well. However, the role of a strategic partner prevails in four companies surveyed, three service retail, energy and engineering sectors and one manufacturer in the automotive sector. The role of a change agent dominates in three service companies in the retail, financial and energy sectors. The role of the administrative expert prevails in four companies, three service companies in the financial, energy and engineering sectors and one manufacturer in the automotive sector. The

role of the employee's advocate is fully delivered in a service company operating in transportation.

Among the tasks carried out by the strategic partner in the surveyed enterprises, the majority was the adaptation of HR strategy to changing business needs, the setting up and implementation of a personnel strategy in connection with the organization's business strategy, management of personnel indicators, as well as the analysis of trends and indicators in the labor market in order to develop new solutions in the area of HR<sup>39</sup>. This is in line with the position of G. Dessler, J. Griffiths and B. Lloyd-Walker, who have previously pointed out that the HR strategic partnership should assume that BP's HR role holders fully participate in the implementation cycle of the company's development strategy<sup>40</sup>. As part of the business partnership, HR BP's role holders primarily implement initiatives related to business and strategic planning, providing HR BP consultations and human capital management expertise. Another role of HR BP is a change agent. The tasks of the change agent relate primarily to the planning and implementation of organizational changes in accordance with the assumed business goals<sup>41</sup>. This HR BP consulting also covers the field of building effective organizational structures, or developing a communication plan in the event of changes in the company. Advisory is also important in situations related to change management and solving complex personnel problems in this area, or supporting the managerial staff in the process of progressing the changes. As part of this role, the HR BP person also initiates significant changes in the organization, which was particularly emphasized by the respondent from the financial sector. A change agent is a role that in some of the surveyed companies is developed at a high level. Nevertheless, in many cases such tasks as planning and implementing organizational changes in accordance with the assumed business goals, or HR BP consulting in the field of building organizational structures are still missing. As part of another role - of employees' advocate - HR BP conducts stay or exit interviews with employees, solves complex personnel problems, including, among others, relations with employees. It also focuses on resolving disputes concerning e.g., non-compliance with work regulations or labor law. The person in this role influences others and shapes relationships<sup>42</sup>. Such person also cares about the continuous improvement of the HR role, as well as builds trust in

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<sup>39</sup> Kopertyńska M. W., Dernowska N., *Wewnętrzne organizacyjne determinanty roli HR Business Partnera w organizacjach (Inter-organisational determinants of an HR Business Partner's role in organizations)*, Zarządzanie Zasobami Ludzkimi, Instytut Pracy i Spraw Socjalnych, 1-2/2021, str. 80-82.

<sup>40</sup> Dessler G., Griffiths J., Lloyd-Walker B., *Human resource management*, op. cit., p. 97-99.

<sup>41</sup> *Ibidem*.

<sup>42</sup> Beck-Krala E., *Rola HR Business Partnera w procesie kreowania wartości dla kluczowych interesariuszy organizacji (Role of HR Business Partner in the process of creating value for key stakeholders of the organization)*, op. cit., str. 151.

HR. The respondent from the automotive sector particularly drew attention to the importance of building trust and influencing stakeholders. In turn, the respondent from the commercial (retail) sector indicated that the task of HR BP is simply to be with people, be with managers, solve their problems, sometimes act as a mediator they trust. Another role of HR BP is an administrative expert, in which HR BP focuses primarily on ensuring the proper functioning of human capital management processes, such as: recruitment and selection, onboarding, employee evaluation, development planning, training and other development activities<sup>43</sup>.

Summarizing the findings on the factors determining the roles of HR BP, it was shown that the business strategy, the positioning of the HR area in the organizational structure and organizational culture exerted the greatest impact on the shape and roles of HR BP in the surveyed enterprises. According to the majority of respondents business strategy is the most important factor influencing the role of HR BP in a company. As the respondents pointed out, it is the starting point for the HR strategy. It should contain elements of HR and generally take into account the impact of HR activities on business areas. The positioning of the HR area in the organizational structure can also influence the role of HR BP in the enterprise. In the opinion of some respondents surveyed, if the HR director holds a position in the management board, then the role of a business partner prevails. In addition, many respondents indicated that the work of people in HR BP positions can be significantly different for companies with different types of organizational culture. Only slightly less important is the phase of development of the organization and the situation in the labor market. According to the respondents, HR BP has a much different scope of tasks when the company starts its operations compared to the scope at the stabilization phase. The research indicated that in the case of companies at the early stages of development, the role of HR BP is rather administrative. In the case of the developed ones, this role is much more structured and assumes the scope of tasks of the strategic partner. The situation in the labor market is another key external factor determining HR activities. Many respondents report that a permanent analysis of the market situation is necessary for HR BP. They also pointed out that the tasks in the area differ depending on the situation in the labor market, especially one that favors the employee more than employers.

Notwithstanding, the HR BP roles are slightly influenced by: competitors' activity, stakeholders' expectations, the nature of the business activity as well as the sector. Competitors' activity exerts an average impact on HR BP roles. Many respondents pointed out that it is

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<sup>43</sup> Filipowicz G., *HR Business Partner. Koncepcja i praktyka (HR Business Partner. Concept and practice)*, op. cit., str. 149.

important for people in HR BP positions to constantly monitor the activities of competing employers. They do not however, attach much significance to these aspects. In the opinion of the majority of respondents, the nature of the business activity is also of little importance for HR BP roles. A person in the HR BP position should be aware of business processes, but this does not matter much for the role and tasks performed. The sector the company is operating in is also of little importance. In the opinion of the majority of respondents, HR processes and HR BP tasks are generally similar, no matter what sector it is. Stakeholder expectations are also a low-importance factor. In many companies, the delivery of stakeholders' expectations (including local communities) falls rather to CSR activities handled by marketing and communication departments.

The most important components of competences for the delivery of tasks belonging to the strategic partner's role are: business orientation, strategic thinking, communication and goal orientation and the so-called business acumen. In principle, all respondents pointed to the high importance of business orientation in the case of the delivery of tasks as a strategic partner. This role is particularly important for creating and implementing HR strategies in connection with the business strategy of the organization, or adapting it to the changing business needs. To sum up, for the role of a change agent, the most important components of competences turned out to be communication, influencing, business orientation, as well as flexibility and openness to change and emotional intelligence. These components of competencies are particularly important in the area of HR consulting for building organizational structures, consulting in the change management process or solving complex personnel problems related to it. The most important components of competences in the role of employees' advocate are communication and emotional intelligence, conflicts solving, knowledge of labor law issues, building relationships as well as customer orientation. Less important are negotiation skills, influencing, and flexibility or openness to change. Knowledge of human resources management, business orientation, goal orientation, business acumen, strategic thinking and analytical thinking are of little importance. These components of competences will be important in undertaking activities aimed at solving difficult and complex employee personnel problems. Respondents attributed slightly less importance to building relationships and exerting influence, which is why it is not possible to fully confirm previous research by K. Lo and K. Macky, according to which the competence of strategic influence and building relationships are particularly important for the implementation of the mediator's role (especially in the context of reconciling different,

sometimes conflicting interests)<sup>44</sup>. In the opinion of respondents' knowledge of labor law issues is most important for the realization of the role of an administrative expert. Analytical thinking, communication, customer orientation and emotional intelligence are also of great importance. Less important is knowledge of human resource management, goal orientation, flexibility and openness to change, building relationships or solving conflicts. Components of competence of negligible importance for this role are business acumen, influencing, negotiation skills, strategic thinking and business orientation.

The proposed managerial implications, resulting from the research, also indicate what managers can do based on the results obtained and what effects they can expect if they decide to introduce certain activities in the enterprise. The research results also show that when people in HR BP positions begin to suggest activities in the area of human capital management that respond to the needs resulting from the business strategy, and as managers expect such activities, there appears space for the development of strategic HR BP roles. It is also important whether the management recognizes the power of human capital. The success of HR BP's activities may depend on the competence of the management staff, primarily of the general director, who, through creating the company's strategy, has a direct impact on how human capital management is perceived. If the management constantly emphasizes the importance of human capital in the organization, HR BP will have much greater opportunities to act and build strategic cooperation with managers. It is also important for managers to shape a favorable organizational culture that is based on partnership relations and open communication. In order to develop HR BP roles and competences, the structure of the HR team should also be properly designed. The HR team should consist of people responsible for specific HR processes and HR BP performing a strategic function. In addition, people in HR BP positions should have the competences needed to perform HR BP roles. It is also important that HR BP roles are clear and legible for everyone. Both managers and employees should know what HR BP's roles involve, know the tasks and scope of responsibilities. Misunderstanding of the roles is one of the key barriers to the development of HR BP roles and competences. It can occur both on the side of business partners, because often the development of effective HR BP is not supported by managers who expect only administrative activities from HR. Misunderstanding of HR BP's roles can also occur among HR employees, due to the fact that HR BP often agrees to perform administrative tasks because they are not aware of their role. When HR processes are not supported by managers,

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<sup>44</sup> Lo K., Macky K., Pio E., *The HR competency requirements for strategic and functional HR practitioners*, op. cit., p. 2308-2328.

but only refer to people performing HR BP roles to conduct administrative activities, then the role of HR BP remains at the administrative level<sup>45</sup>. This is an important note for managers who often underestimate the importance of HR BP in enterprises, still considering employees in terms of costs, not in terms of the most important capital<sup>46</sup>. The results of the conducted research can be used by practitioners in the process of developing HR BP roles and competences.

The conclusions of the research require further in-depth analysis as well as systematic monitoring, especially in the context of very dynamic social and economic changes. As a result of the qualitative study, the roles and competences of HR BP in twenty enterprises were analyzed in detail. The research requires retesting on a larger research sample to confirm the defined conclusions. In future research, it seems reasonable to analyze the roles and competences of people in HR BP positions on a more representative research sample. In addition, due to the very dynamic development of HR roles and competences, it would also be worthwhile to undertake research on new roles, constantly updated by D. Ulrich.

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<sup>45</sup> McCracken M., O'Kane P., Brown T. C., McCrory M., *Human resource business partner lifecycle model: exploring how the relationship between HRBPs and their line manager partners evolve*, op. cit., p. 58-74.

<sup>46</sup> Kopertyńska M. W., Dernowska N., *Wewnątrzorganizacyjne determinanty roli HR Business Partnera w organizacjach (Inter-organisational determinants of an HR Business Partner's role in organizations)*, Zarządzanie Zasobami Ludzkimi, Instytut Pracy i Spraw Socjalnych, 1-2/2021, str. 83.