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**Recruitment of Portuguese nurses:
A strategic communication plan for a German clinic**

Project to Universidade Católica Portuguesa to obtain a
Master's Degree in Communication, Strategic Communication
and Leadership

By

Julius Wilhelm Ellermann

Faculty of Human Sciences

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Abstract

The global shortage of nurses, exacerbated by aging populations and increasing healthcare demands, presents critical challenges for healthcare organisations worldwide. The aim of this project was to develop a strategic communication plan for recruiting Portuguese nurses to a German clinic, *ARCUS*, a leader in orthopaedic surgery and sports medicine. The plan leverages the strengths of Portuguese nursing education, the socio-economic dynamics and working conditions in Portugal's healthcare sector, and the high employer standards of the *ARCUS Clinic* in Pforzheim, Germany. Based on a thorough literature review in combination with a quantitative survey, the investigation for effective strategies and tactics for cross-national recruitment was realised as part of the strategic communication plan. First hand empirical data of Portuguese nursing students regarding academic motivation and labour migration preferences allowed the creation of specific Vision, Mission, and Values statements, employer branding and the dissemination of personalised employee value propositions. The resulting messages promote opportunities for education and professional development for young Portuguese nurses and nursing students in Germany. This project provides a framework for European nurse recruitment initiatives and contributes to the research in the broader field of healthcare communication and sustainable recruitment. Furthermore, the project serves as an example for healthcare organisations to enhance employer branding and develop innovative employee value propositions.

Key words: global nurse shortage, strategic communication, healthcare recruitment, employer branding, employee value proposition, professional development

Resumo

A escassez global de enfermeiros, exacerbada pelo envelhecimento da população e pelo aumento da procura de cuidados de saúde, apresenta desafios críticos para as organizações de saúde globalmente. O objetivo deste projeto foi desenvolver um plano estratégico de comunicação para recrutar enfermeiros portugueses para a Clínica *ARCUS*, líder em cirurgia ortopédica e medicina desportiva. O plano aproveita os pontos fortes do ensino de enfermagem português, a dinâmica socioeconómica e as condições de trabalho no sector da saúde em Portugal e os elevados padrões de empregabilidade da *Clínica ARCUS* de Pforzheim, na Alemanha. Com base numa revisão exaustiva da literatura e num inquérito

quantitativo, a investigação de estratégias e táticas eficazes para o recrutamento transnacional foi realizada como parte do plano de comunicação estratégica. Os dados empíricos em primeira mão dos estudantes de enfermagem portugueses relativos à motivação académica e às preferências de migração laboral permitiram a criação de declarações específicas de Visão, Missão e Valores, a criação de uma marca do empregador e a divulgação de propostas de valor personalizadas para os trabalhadores. As mensagens resultantes, promovem oportunidades de educação e desenvolvimento profissional para jovens enfermeiros portugueses e estudantes de enfermagem na Alemanha. Este projeto fornece um enquadramento para as iniciativas europeias de recrutamento de enfermeiros e contribui para a investigação no domínio mais vasto da comunicação dos cuidados de saúde e do recrutamento sustentável. Além disso, o projeto serve de exemplo para as organizações de cuidados de saúde melhorarem a imagem de marca do empregador e desenvolverem propostas inovadoras de valor para os trabalhadores.

Palavras-chave: escassez global de enfermeiros, comunicação estratégica, recrutamento em saúde, marca empregadora, proposta de valor para o colaborador, desenvolvimento profissional.

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Special thanks go out to my supervisor Ioli Campos, whose expertise has helped me finalise this project. The perspective of a communication scholar from outside the strategic communication sphere has been a valuable input.

I dedicate this work to my girlfriend, who has never stopped motivating me to give it the “last little push”. Thank you for being by my side.

Table of contents

Introduction	10
PART I: THEORETICAL FRAMEWORK	12
1. Strategic communication	12
1.1 Strategy and communication in the organisational context	17
1.1.1 Developing organisational strategy	23
1.1.2 Open Strategy	24
1.2 Planning and executing strategic communication.....	26
1.2.1 Vision, Mission, and Values	31
1.2.2 Situation and Stakeholder Analysis.....	33
1.2.3 Goals & Objectives	38
1.2.4 Strategy and tactics.....	39
1.2.5 Evaluation.....	41
1.3 Global strategic recruitment and selection.....	43
1.3.1 Employer Branding	48
1.3.2 Cross-national message tactics for unknown organisations	51
2. State of the sector: Healthcare systems of Germany and Portugal	55
2.1 Hospitals and clinics: structural problems and reforms	59
2.2 Nursing in Portugal and Germany.....	62
2.3 Labour migration amongst healthcare professionals.....	67
2.4 Workplace integration of internationally qualified nurses in German hospitals	70
2.5 Future professional prospects of nurses	72
PART II: THE PROJECT	77
3. Methodology	77
3.1 Context of the study	77
3.2 Research questions	78
3.3 Research object	79
3.4 Methodological approach and design.....	81
3.4.1 Interview design	82
3.4.2 Survey design	83
3.4.3 Data collection.....	85
3.4.5 Sampling.....	87
3.4.6 Data analysis.....	88

3.4.7 Ethical considerations.....	88
3.5 Data presentation and analysis	89
3.6 Discussion	99
4. Strategic Communication Plan	103
4.1 Foundation Phase	103
4.1.1 Project rationale.....	104
4.1.2 Vision, Mission, Values statement proposal	107
Application Phase.....	108
4.1.3 PESTLE Analysis: Healthcare Portugal & Germany	110
4.1.4 SWOT Analysis: <i>ARCUS</i>	112
4.1.5 Stakeholder Analysis: Recruitment of Portuguese nurses	113
4.1.6 Benchmark Analysis: Recruitment of Philippine nurses	115
4.2 Implementation phase	117
4.2.1 Ambition statement (external)	117
4.2.2 Rationale statement (internal)	117
4.2.3 Objectives.....	119
4.2.4 Timeline.....	119
4.2.5 Planning Matrix	120
4.2.6 Employer branding	122
4.2.7 Employee Value Proposition	126
5. Conclusion	129
6. Future prospects.....	130
7. References	133
APPENDIX.....	181
8. Appendix A: Online survey	181

List of Figures

Figure 1: “The scientific sphere of the Strategic Communication field”	12
Figure 2: “Strategic Communication”	14
Figure 3: “Approach A: Strategic Communication Planning”	25
Figure 4: “Approach B: Agile Strategic Communication Framework”	26
Figure 5: “Approach C: Strategic Communication Functions”	28
Figure 6: “SWOT Analysis Matrix”	33
Figure 7: “Employer branding model for small to medium sized organisations”	50

List of Graphics

Graphic 1: “Project Research Process”	79
Graphic 2: “Destination Country Preferences”	87
Graphic 3: “Social Media Platform Item”	87
Graphic 4: “Regression Line IM_total/EM_total Academic Motivation”	88
Graphic 5: “Regression Line AM/IM_total Academic Motivation”	88
Graphic 6: “Main Pull Factors”	90
Graphic 7: “SWOT Analysis”	105
Graphic 8: “Stakeholder Analysis”	106
Graphic 9: “Recruitment Process Timeline: Barriers”	110
Graphic 10: “Recruitment Process Timeline: Tactics”	111

List of Tables

Table 1: “Pearson Correlation Matrix for Academic Motivation”	88
Table 2: “External Factors related to Working Abroad”	91
Table 3: “Employment Conditions and Benefits / Destination Country”	92
Table 4: “Germany Main Pull Factors”	93
Table 5: “Switzerland Main Pull Factors”	94
Table 6: “UK, Ireland Main Pull Factors”	94
Table 7: “Spain Main Pull Factors”	94
Table 8: “BENELUX Main Pull Factors”	94
Table 9: “Norway, Sweden, Finland Main Pull Factors”	95

Table 10: “Project Rationale”.....	100
Table 11: “Benchmark Analysis”.....	112

Introduction

Healthcare organisations worldwide and across Europe are facing challenges related to severe workforce shortages. This shortage is driven by factors such as aging populations, rising healthcare demands, and the need for highly specialised care. Nurses, which make up the largest percentage within the medical workforce, are highly demanded globally. German hospitals and clinics are facing a critical shortfall in nursing staff, which has led to a proactive search for qualified professionals beyond national borders. Recognising the growing need for skilled healthcare personnel, this project sets out to plan a communication strategy for a cross-border recruitment effort, focusing on Portugal as a key source of highly qualified nursing talent. A key requirement to communicate between the recruiting organisation and talent is understanding the perspective of the target group. Preferences and motivations of young Portuguese nursing talent must be carefully evaluated and set into context.

Specifically, this project is proposing a Strategic Communication Plan for the recruitment of Portuguese nurses to the *ARCUS Clinics* Pforzheim, Baden–Württemberg, Germany. As an independent leader in the specialised field of orthopaedics and sports traumatology, *ARCUS* is ranked amongst the best clinics in Germany – both by patients and employees. Having already made promising experiences with global recruitment and being known as a top-employer in their region, *ARCUS* has legitimate ambitions and the sufficient prerequisites to develop an innovative approach to attracting internationally qualified healthcare personnel in a sustainable manner. Analysis of past international recruitment endeavours and current employer branding efforts by *ARCUS*, was combined with empirical research focusing on Portuguese nursing talent as the target group for the Strategic Communication Plan.

From an organisational perspective the choice of Portugal as a source country is informed by several factors: the availability of qualified nurses according to the European standard, the strong reputation of Portuguese nursing education, and the socio-economic dynamics within Portugal’s healthcare sector, where employment opportunities abroad are often more attractive due to compensation and career advancement possibilities. Beyond the prevalent guidelines by the WHO and German practice of global health worker recruitment (e.g. “Triple-Win”), it is an additional self-dictated ethical requirement for *ARCUS* to ensure foreign recruits receive training, education, social inclusion, and no restraints to return to their origin countries if they wish. Furthermore, the specific strategy elaborated in this project opts to recruit young nurses

who are interested in professional development and gaining experience abroad, whilst retaining the option to eventually return to Portugal.

As a constantly growing and economically successful organisation, *ARCUS* aims to offer competitive job benefits and favourable working conditions in the German hospital sector. However, despite the advantageous position of the organisation in the domestic labour market, the recruitment of global healthcare talent – such as Portuguese nurses – presents unique challenges. These challenges exist across all levels of strategic communication: within the Portuguese and German health systems, but also on the organisational and individual level. In order to ultimately reach the goal of employing nurses from Portugal at the *ARCUS*, the recruitment effort must be bridging language barriers and fostering integration within the organisational culture. Hence a holistic communication strategy is necessary to attract, inform, and support Portuguese nurses throughout the recruitment and onboarding process, ultimately securing workforce and enhancing a culture of flexible IQN staffing.

The empiric development of the Strategic Communication Plan aims to contribute to the field of strategic healthcare communication by offering insights into cross-national recruitment processes, employer branding, and integration strategies within a healthcare context. Through applied research, the project displays a communication framework that supports *ARCUS'* recruitment objectives while ensuring that Portuguese nurses experience a smooth transition and integration into their new roles. The close relationship between empirical research and the final project creation is indispensable.

By examining the intersection of strategic communication, healthcare recruitment, and labour migration, this project provides valuable knowledge for healthcare organisations facing similar workforce challenges, potentially serving as a model for future international recruitment efforts in delicate and complex environments. Furthermore, this project aims to propose a sustainable solution to nurse migration in practice by developing employer value propositions that go beyond salary and conservative long-term retention strategies. Instead, focusing on the empowerment of young nurses, the proposed work benefits include professional development and specialised education opportunities tailored for flexible employment situations in a changing work culture.

PART I: Theoretical Framework

1. Strategic communication

Strategic communication is a multidisciplinary field of knowledge that comprises different forms of goal-directed communication activities between organisational entities (Zerfass et al., 2018). As a professional and academic concept strategic communication has emerged in the last two decades (Falkheimer, 2022). Its distinct holistic approach makes the concept relevant to several sectors of late modern society, such as business, politics, government, and culture. According to Falkheimer (2014), research in strategic communication either follows an organisational perspective, related to organisational effectiveness, management and culture, or it follows a societal perspective, relating to social change, societal behaviour and public opinion. In the general context of strategic communication, the term “organisation” is defined in a broad manner, reaching from nation-states, communities and companies to activist groups or organised professional individuals (Hallahan et al., 2007; Werder et al., 2018).

From a historical perspective, forms of strategic communication have existed for as long as organisations, which themselves are communicative and goal oriented by nature (Falkheimer & Heide, 2018). However, from a managerial and academic research perspective, strategic communication is a rather newly emerged subject with ongoing scholarly debates about its definition and conceptual boundaries (Falkheimer & Heide, 2023; Werder et al., 2018). More precisely, the field of strategic communication in communication science evolved in the beginning of the 21st century, as a result of a paradigm shift due to the media technological advancements (Mahoney, 2011). In today’s increasingly complex world, organisations (alike people or brands) are competing for attention, admiration and loyalty of various stakeholder groups (Hallahan et al., 2007). Technological advancements, which are accelerating the deep mediatization of society, have made it even more challenging for organisations to earn the attention of customers, employees, investors, officials, or the general public (Hepp, 2020; Hallahan et al., 2007; Holtzhausen et al., 2021).

The scientific articles and books published in the last two decades, as well as the worldwide growing number of undergraduate and graduate university programs, professorships, and conferences have institutionalised strategic communication in the international academic community (Falkheimer & Heide, 2023; Zerfass et al., 2018). However, it is worthwhile understanding the discussions around the emergent concept of strategic communication, in order to understand and apply it later in the context of nurse recruitment.

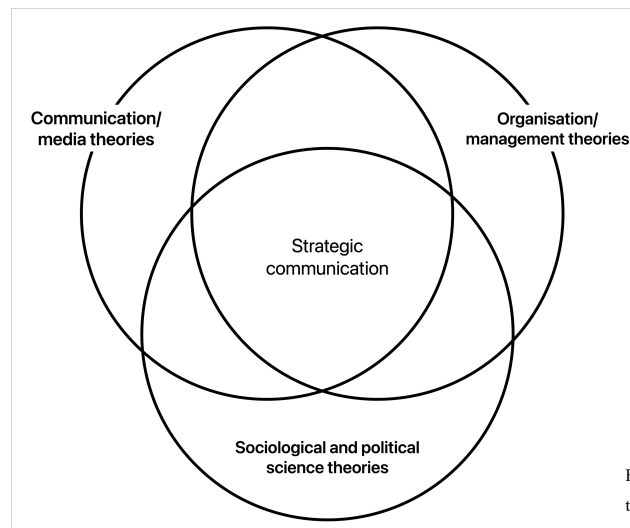
As a research field, strategic communication was initially defined by Hallahan, Holtzhausen, Van Ruler, Vercic, and Sriramesh in 2007, who were examining how communication is used inside organisations and between stakeholders, to reach organisational goals. Assuming people deliberately communicate on the behalf of causes, movements, organisations, or other entities, the authors defined strategic communication as “the purposeful use of communication by an organisation to fulfil its mission” (Hallahan et al., 2007, p. 3). Emphasizing the significance of “communication” in the process of strategic communication, Hallahan et al. (2007) distinguish strategic communication from mere strategic organisational processes, which do not necessarily revolve around communication. Furthermore, the emphasis on active participation in intentional communication indicates that in their definition, the authors do not only describe the process of strategic communication, but also outline the conditions for successful implementation of a communication plan (Holtzhausen & Zerfass, 2015).

Holtzhausen and Zerfass (2015) later suggest in the first chapter of the “Routledge Handbook of Strategic Communication”, that the process of strategic communication typically follows an organisation’s strategic plan, focusing on the role of communication in accomplishing the organisations’ strategic goals and objectives. Frandsen and Johansen (2016) argue, central to the practice of strategic communication are not only the specific goals of a particular communication campaign or project, but also the work-related long-term goals or the organisational mission. Hence, the scope can be interpreted differently. Within this project, the understanding of a strategic communication plan is beyond mere campaign planning and refers to a holistic strategic plan that entails all communication efforts of the organisation (Frandsen & Johansen, 2016; Heide et al., 2018) including the “day-to-day strategic conversations through which strategies get developed, tested, and implemented” (Liedtka, 2000, p. 203).

Hallahan et al. (2007) state strategic communication allows a more comprehensive understanding of organisational communication, examining it from an “integrated, multidisciplinary perspective by extending ideas and issues grounded in various traditional communications disciplines” (p. 4). Published in the inaugural issue of the *Journal of Strategic Communication*, this definition has built the basis on which scholars have discussed the dimensions and purposes of this arguably elusive subject (Nothhaft et al., 2018; Werder et al., 2018). However scholars aimed to define the boundaries of the field, clarifying underlying academic concepts, and identifying practical approaches (Holtzhausen & Zerfass, 2015; Nothhaft et al., 2018). Exemplary, one problem with the initial definition of Hallahan et al. (2007) is that other forms of communication, even routine communication, may also be

purposeful and, in a broad way, thereby fulfilling the organisation's mission (Zerfass et al., 2018). In this regard, Ihlen and Verhoeven include symbolic, interpersonal, and social communication, as well as the non-personal communication function in system theory within strategic communication (Ihlen & Verhoeven, 2015).

Many contributions to strategic communication have been made by scholars from various established fields such as public diplomacy, management communication, advertising, journalism, and others, sharing theoretical groundwork from social psychology, organisational theory, communication studies, and business management (Holtzhausen et al., 2021; Holtzhausen & Zerfass, 2015; Werder et al., 2018). Technological, social, cultural, and political-economic developments in these fields have merged research closer together than ever before, leading to the integration into the one framework that is strategic communication (see figure 1) (Falkheimer & Heide, 2023).



A key driver for this mernge is the realisation that in practice internal and external communication are interlinked, and that establishing enduring relationships and a collective identity are common objectives in an organisations' communication efforts (Falkheimer & Heide, 2023, p. 88). Some scholars argue the reason for the rapid development of the field strategic communication to have been caused by the global economic crisis of 2008/09, after which many shuttered organisational images and lost trust in institutions, leaders, and senior management had to be restored (see Mahoney, 2011). An important factor in this context is the concept of alignment, referring to the interlocked relationship of organisation, stakeholders and their common goals (Volk & Zerfass, 2018). Volk and Zerfass (2018) define alignment in strategic communication as "the varying degree of linkage between the communication strategy and the overall organisational strategy (primary alignment) and of the coherence between communication activities, including brands, images, symbols, messages, or topics, and between

them and communication strategy (secondary alignment) for the purpose of achieving organisational goals” (p. 443).

Falkheimer and Heide (2014) localise strategic communication close to corporate communication, as it marks the organisations’ targeted communication efforts, however, they exceed the understanding of communication in this context as “not only a process for information dissemination, but also the very constructing and maintaining of an organisation” (p. 130). The importance in strategic communication to maintain, strengthen or change the image of the organisation amongst stakeholders form an obvious link to the field of marketing and advertising (Falkheimer, 2014). Yet, the strategic communication approach on image is less focused on direct relations to customers, but more on indirect relations through stakeholders, such as institutions or local communities (Falkheimer, 2014). In regard to public relations as another related scientific field, the authors further argue that “strategic communication is a conceptual and holistic framework has become more valid and relevant than public relations”, due to the transboundary transitions in industry, research and education (Falkheimer & Heide, 2014, p. 124). Heide et al. (2018) regard public relations as an important component in the wider field of strategic communication, encompassing all facets of an organisation’s communication – both internal and external.

Also operating as a modernisation of what used to be called integrated communication (Zerfass et al., 2018), most scholars view strategic communication not as a definite replacement, but rather as an umbrella term focusing on overlapping in the traditional fields (Holtzhausen & Zerfass, 2015; Nothhaft et al., 2018). Similarly, strategic communication has successfully succeeded over public relations in the context organisational communication (Falkheimer & Heide, 2014). Zerfass et al. (2018) argue, the field of public relations is varying between countries and does not sufficiently depicting and summarising the practical processes in the industry—as opposed to the holistic framework of strategic communication, which is more capable to capture the complex phenomenon of an organisations’ targeted communication processes. Perhaps one of the most complete definitions to date has been achieved by Zerfass et al. (2018):

“Strategic communication encompasses all communication that is substantial for the survival and sustained success of an entity. Specifically, strategic communication is the purposeful use of communication by an organisation or other entity to engage in conversations of strategic significance to its goals.” (p.493)

Heide et al. (2018) follow and promote this holistic approach by proposing the Communicative Constitution of Organisations (CCO) as a perspective for further development

in the field. The authors argue the CCO perspective offers metatheoretical approaches and a broadened view over the actors and communication activities which are essential to strategic communication and future research. It highlights that communication cannot be confined to just one profession or organisational function, such as corporate communication, public relations, or marketing (Kuhn & Schoeneborn, 2015). Instead, communication is seen as an essential process that permeates the entire organisation and is fundamental to its existence. Hence, communication is not a variable, but a lens through which the observer comprehends organisational processes and actions (Heide et al., 2018).

A common known deviation of the term “strategic” for the use in business and management has been “strategic management”, which specifically consists out of defining organisational goals, implementing a strategic plan and allocate resources (Heide et al., 2018). Van Ruler (2021) argues “strategic communication is about communication, in the context of organisational strategy development and implementation” (p. 115). As shown in Figure 2, Werder et al. (2018) identified the most relevant disciplines to strategic communication so far. Additional disciplines, such as military theory or information technology, have been neglected by researchers and might have future relevance, respectively (Werder et al., 2018). Overall, the authors propose an integrated and interdisciplinary perspective on strategic communication (Werder et al., 2018).

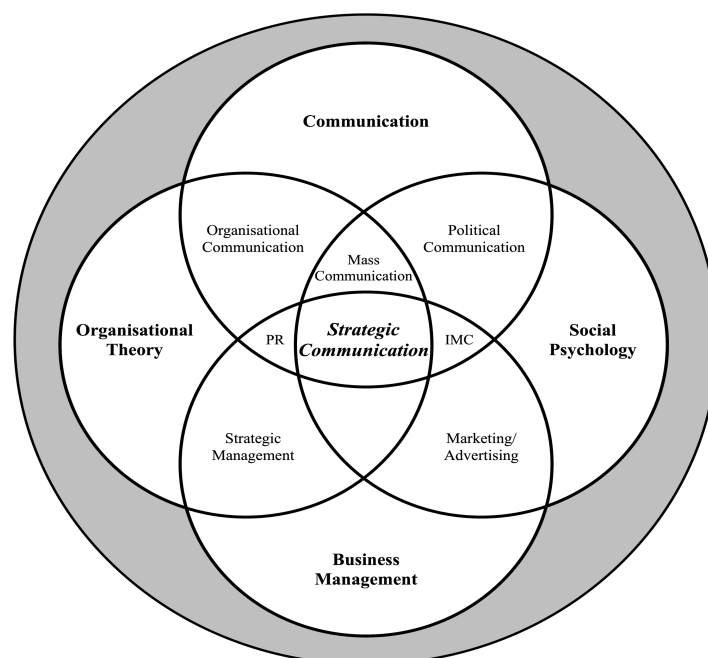


Figure 2: “Strategic Communication”

In regard to the different definitions and perspectives on strategic communication, van Ruler (2021) concluded that the concept rests on the two pillars “organisational strategy” and “communication”, which have to be looked at separately first in order to apply it correctly.

Botan (2018) supports this argument by defining strategic communication as “the use of strategic information as input in communication planning itself” (pp. 8–9). Therefore, in regard of the evolutionary process of strategic communication as a scientific and practical field, the holistic approach allows to execute organisational communication in a mission-oriented fashion, throughout organisational levels which aims to increase efficiency in problem solving and the achievement of long-term goals (Volk & Zerfass, 2018). The perhaps most encompassing, up-to-date perspective is given by Falkheimer and Heide, who describe strategic communication as a “fundamental part of an organisation’s management function and a practical field of specialisation that includes the exploration of needs, planning, strategic formulation, communication interventions, communication programs, and internal communication processes” (2023, p. 109).

1.1 Strategy and communication in the organisational context

The term “strategy” originates from the Greek “stratēgía” or “strategos” and can be translated to “generalship” or “the art of the general” (Mikalson, 2016; Ueding, 2009). Related to the Greek verb “strategein”, which was used to express “being the leader” or “building roads to reach certain goals”, the meaning and use of strategy and strategic behaviour was always used in different ways (Mikalson, 2016; Van Ruler, 2021; Wheeler, 1988). At its core, strategy outlines how goals are achieved through the utilization of resources, encompassing both formulation and implementation. (Ulwick, 1999). “The Art of War”, written around 360 BC in China by Sun Tzu, is the earliest known work on military strategy, providing timeless principles and tactics that have influenced military leaders and strategists throughout history (Boorman & Sun, 2024). To large extends the concept of strategy we refer to today was shaped by the Prussian General and theorist Carl von Clausewitz during the Napoleonic wars, hence it is still associated with war and conflict (Holtzhausen et al., 2021). However, recently, German communication scholars were able to identify a large amount of learnings from von Clausewitz’ work to be taken into consideration in the context of organisational communication in the 21st century, specifically strategic communication (Nothhaft & Schölzel, 2015). Today, apart from the military, strategy is used as a term and concept by politicians, managers, consultants and other professional groups, with variations in meaning and application (Falkheimer & Heide, 2023).

Applying strategy in the modern world is still generally associated with the virtue of thinking and planning before acting, in order to achieve an intended result (Holtzhausen et al.,

2021). For organisations this means focusing on comparative benefits and competitive performance (Falkheimer & Heide, 2022b). In organisation theory, the term “strategic” was first used in the 1950’s to describe an organisations competition for market share (Hatch, 2018). In business management, the organisations’ strategy is partially reflected by the manager’s intention to accomplish a result over a defined period of time, in order for the organisation to gain a competitive advantage (Betz, 2016; Holbeche, 2009). In fact, a large part of scientific debate over strategy in management used to follow this traditional linear view on the concept, assuming certain planned activities and actions result in certain desired effects (Moss et al., 2000). Strategy within the management field has historically neglected the dimensions of public relations and strategic communication (Moss et al., 2000). However, research has since shown the need to strategically consider communication efforts in organisational goal-achievement, and scholars have tried to integrate strategic communication in strategy research (Gulbrandsen & Just, 2022). After all, when strategy is seen as a management function, including outlining the organisation’s path towards its ultimate objectives, then that means guiding the organisations’ members, which must include some form communication (Eriksson, 2015).

Leading strategy researcher Richard Whittington (2019) divides the evolution of strategy-as-practice and in research in three stages: strategic planning, strategic management, and open strategy. On the one hand, Strategic planning evolved in the 1960’s, followed up by strategic management in the 1970’s – focusing on linear, rational, large-scale planning of strategy and an increased focus on learning and change processes, respectively (Whittington, 2019). Open strategy on the other hand, evolved in the late 1990’s and approaches strategy development with the inclusion of stakeholders from in the initial stages on, highlighting the fundamental aspect of communication in strategy and strategizing (Falkheimer & Heide, 2022b; Whittington et al., 2011). However, the various strategy schools that have evolved in the course of the last decade, are focusing on different aspects and from different perspectives of strategy (Falkheimer & Heide, 2022b). Despite the constant struggle for consensus and the frequent emergence of new concepts, Mintzberg and Lampel (1999) argued for a broader perspective, advocating the different schools of thought should open up to each other and acknowledge each other strengths and weaknesses.

Certainly there are several examples of important concepts being used throughout time, such as “management by objectives” by Peter Drucker (1955), which is considered to be fundamental to corporate strategy work and also used by Hallahan (2015) to explain the role of organisational goals and communication objectives in strategic communication. Another

concept from the 1950's is the well-known SWOT Analysis (the acronym standing for strengths, weaknesses, opportunities, threats), which is being applied by organisations to date for planning procedures such as benchmarking, industry analysis, situation analysis, and scenario planning (Benzaghta et al., 2021; Leigh, 2009). In the following decades, concepts such as gap analysis, strategic planning, and competitive strategy emerged, however, in the end they all represent different special aspects of strategy and allow a broader understanding when combined, according to Mintberg and Lampel (1999). Contrary to this belief, scholars with a social constructionist perspective argue there is no common ground, and that each perspective only allows to understand the perspective of the according strategy (Falkheimer & Heide, 2022b).

Nonetheless, it is important to note there is no general consensus over the definition of the term “strategy” within the fields of organisation and management communication (Chaffee, 1985; Mintzberg, 1973; Mishra & Mohanty, 2022). In addition, there has been a long lasting debate in strategy theory about whether strategy is a previously developed analytic process (deliberate strategy), or an emergent process arising from the environment (emergent strategy) (Van Ruler, 2021). In other words, on the one hand strategy is traditionally understood as being something an organisation possesses and management has full control over, hence being closely connected to strategic planning (Falkheimer & Heide, 2022b). On the other hand, contemporary research suggests strategy refers to activities done by organisation members, based on learnings from practice and in response to changes in the environment (Vaara & Whittington, 2012; Whittington, 2019). Ullwick (1999) considered that many authors attempt to define the term, but rather define the process of formulating or developing strategy instead. Organisational strategy development theories have evolved over time – classical strategy theory is focused on long-term planning, while modern approaches are more concerned with the ability to adapt and continuous development (Van Ruler, 2021), as well as strategic improvisation (Falkheimer & Heide, 2022b). In the words of “Strategy is always work in progress, and what is of the utmost importance is planning as the process, not plans as products”

Especially in the context of organisational communication it is relevant to mention “strategic” does not necessarily mean manipulative or propagandistic (Holtzhausen & Zerfass, 2015). Detached from the connotations of negative origin, a “strategic” approach in modern management communication aims to be inclusive and collaborative, which is regarded by practitioners to be more effective than to be exclusive and imposing (Hallahan et al., 2007; Holtzhausen et al., 2021, pp. 68–70; Holtzhausen & Zerfass, 2015). As pointed out by Holtzhausen (2013), a key element of “strategic” in strategic communication is “dialogue”.

Nonetheless, the key objective for organisations to communicate strategically remains the desire to shape the environment to its needs by influencing the behaviour, attitudes or knowledge levels of different entities in regard to products, issues or services (Holtzhausen & Zerfass, 2015). The organisation must create shared meaning with their stakeholders, establishing a common understanding of the strategic communication process as a whole (Holtzhausen et al., 2021). According to Marchiori and Bulgacov (2015), it is of fundamental significance for the communication practices to be regarded by the participants as essential and strategic to the organisation's mission. The authors argue that this acknowledgment arises from the understanding that communication is the factor that animates a strategic process, making communication a constituent element of strategy (Marchiori & Bulgacov, 2015).

Following Habermas' societal communication theory (1995), social actions are divided into strategic and communicative actions (as shown in figure X). While strategic action is goal oriented, persuasive, and instrumental, communicative action is directed toward understanding and consensus (Habermas, 1995). On this basis Falkheimer and Heide argue Habermas' theory states that strategic communication in itself is not communicative, but strategic. However, as on the one hand strategic communication practitioners emphasize openness and rational discourse, the authors make the argument that a hidden strategic purpose being pursued (Falkheimer & Heide, 2023). On the other hand, communicative actions (Habermas, 1995) emphasize participation over efficiency with the goal of reaching shared common meaning (Falkheimer & Heide, 2022a). However, in this context the ideal is an objective and rational discussion for everyone to participate in, with decisions made on common consensus based on objective analysis (Habermas, 1995) – a situation very difficult to create in dynamic realities.

The link between communication and organisations has been emphasized by scholars for a long time, however, it was Weick (1979) who shifted the focus on communication by arguing that organisations consist out of a variety of informal and formal interpersonal relationships between people. This affirms communication as the foundation of all organisations and their activities, according to Falkheimer (2014). In the opening chapter of the "Routledge Handbook of Strategic Communication", Holtzhausen and Zerfass (2015) state the belief that communication can be controlled is mostly redundant, therefore they reject a linear transmission model and call upon a constitutive communication approach, as it focuses on the importance of communication in enabling actual action and change.

Contrary to potential instincts when planning organisational communication efforts, successful communication does not begin with e.g. a campaign or other communication with stakeholders (Holtzhausen et al., 2021). As there are plenty of factors inside and outside of the

organisation to be considered first when trying to communicate effectively, the actual communication is one of the last steps in the planning process of strategic communication (Holtzhausen et al., 2021). An effective way of acting within this overwhelming area of interest, strategic communication can be divided up into three hierarchical levels: macro (societal level), meso (organisational level), and micro (communication level) (Falkheimer & Heide, 2023, p. 9; Holtzhausen et al., 2021, pp. 21–23). However, the levels are engaging with each other and are to be seen as interlinked perspectives, not as separated areas (Holtzhausen et al., 2021).

Macro-, Meso-, Micro-Level

The macro level, also called the societal level, describes the wider external environment in which the communication problem exists or the project takes place, affecting all involved communicative entities and stakeholders in the public sphere (Holtzhausen et al., 2021; Holtzhausen & Zerfass, 2013). The analysis of the macro level should include an all-encompassing comprehension of the surroundings of the organisation, as well as the effects of global trends on it (Holtzhausen et al., 2021). The complex external environment can be divided into different sectors: social, legal, economic, political, media, and physical sector (Holtzhausen et al., 2021, pp. 76–83). Examples of theoretical applications include chaos and complexity theory, sociocybernetics, as well as change communication (Holtzhausen & Zerfass, 2013). The macro level is key in taking the perspective of an organisations' stakeholder groups and in connection to the meso level, helpful in understanding the relation between the organisations and society as a whole, and also specifically relevant sub-systems to the organisation such as the political, economic or health system (Fredriksson, 2009; Holtzhausen et al., 2021). Analysing the self-representation of an organisation in society is an important part of strategic communication (Hallahan et al., 2007).

By understanding the perspectives of the macro level and interpreting them correctly, communication professionals can apply their analysis on the meso level to form the organisations' grand strategy (Holtzhausen et al., 2021). Hence, the meso level is also called the organisational level, and it provides opportunity to look at the roles of the communicators inside the organisation (Holtzhausen & Zerfass, 2013). As it is on this level where the process of forming the strategy is taking place through the work of the communication professional, the organisational structure and the decision-making-behaviour are important factors (Holtzhausen et al., 2021).

On the other end of the hierarchy, micro level communication focuses on the actual implementation of tactics and exchange of messages between the communicative entities

(Fredriksson, 2009). In the context of strategic communication, exemplary fields in practice include corporate social responsibility, crisis communication, branding, reputation management, or social media engagement (Holtzhausen & Zerfass, 2013). Communication tactics are implemented at this level, information is being processed, shared meaning is formed, and the communication messages within are being encoded (Holtzhausen et al., 2021, p. 23).

The different levels indicate the different environments where strategic communication is being executed. Stakeholders in each level must be addressed accordingly whilst maintaining the organisational strategy, in order to create shared meaning (Jepsen & Eskerod, 2009; Volk & Zerfass, 2018). Traditional research on strategy tends to remain in the macro level which limits perspectives on where actual strategies in practice are introduced and applied (Falkheimer & Heide, 2022b). Although research on strategy and strategy development remains vague and inconsistent in its utilization in practice, the desire to shape the environment to its needs by influencing the behaviour, attitudes or knowledge levels of different entities is a central aspect in fulfilling the organisation's mission (Mishra & Mohanty, 2022). Hence, understanding the differences and magnitudes of strategy and communication in Micro-, Meso-, and Macro-level, is key to implementing strategic communication thinking in organisational actions (Holtzhausen et al., 2021).

In conclusion, strategy in organisations is a communicative practice conducted at different levels, constantly creating and reproducing the organisation (Falkheimer & Heide, 2022b). Following the perspective of Marchioiri and Bulgakov (2015), which argue strategy not something possessed by an organisation but realised by organisers, the importance of communication in the creation of strategy becomes apparent. This in turn furthermore highlights the importance of the holistic approach of strategic communication, which aims for transparency, the inclusion of internal and external stakeholders, and the alignment of corporate strategy and communication strategy (Hallahan, 2007; Volk & Zerfass, 2018). This perspective is supported by Van Ruler in her conclusion of the essence of strategic communication:

“ (...) strategic communication is closely related to strategy development by the organisation as a whole and should also be strategic in itself. The kind of strategy development methodology in use in an organisation will, of course, lead the kind of communication strategy used.” (Van Ruler, 2021, p. 115)

1.1.1 Developing organisational strategy

Following Van Ruler's statement, there are fundamentally different approaches to the development or planning of organisational strategy, which is key component for strategic communication (Holtzhausen et al., 2021; Marchiori & Bulgacov, 2015). As mentioned before, strategic communication is neither random nor spontaneous, but purposive and deliberate – which demands some form of prior planning (Hallahan et al., 2007; Holtzhausen et al., 2021). The strategy schools mentioned earlier (strategic planning, strategic management, open strategy) pursued by the organisation, have different impacts on the development of the strategizing processes (Gulbrandsen & Just, 2022; Ulwick, 1999; Van Ruler, 2021).

According to Schendel and Hofer (1979), strategic planning is a logical process that entails defining a mission statement, setting long-term objectives, conducting environmental studies, formulating a strategy, putting it into action, and maintaining control. Hence, traditionally, organisations would commence the process with an inward perspective on the results leadership expects from the strategy and later the execution of the strategic plan (Holtzhausen et al., 2021). Also referred to as top-level strategizing, the so-called “inside-out” approach is characterised by often being conducted by an elite group in the organisation, in a classified, non-inclusive, secretive manner (Powley et al., 2004; Tavakoli et al., 2017; Holtzhausen et al., 2021, p. 23). Although today increasingly regarded as outdated, Potter (2006) argues strategic planning has been transformed by technology but remained in essence an established tool for managers to make organisational decisions and a template for evaluation of those decisions.

However, neglecting potentially valuable input from internal and external stakeholders may result in the strategy as being perceived as manipulative and imposing – a risk factor that is being recognised in the concepts of strategic management and open strategy (Gulbrandsen & Just, 2022). Contrary to “inside-out”, the innovation driven “outside-in” approach is regarding key stakeholders (Russell, 1999), and is therefore arguably better compatible with the holistic approach of strategic communication (Holtzhausen et al., 2021, pp. 23–25). Originating from business management theory, scholars from the field of strategy approaches argued for one or the other (Miller et al., 2002; Porter, 1991), or also a combination of both approaches (Adžić, 2020). Regardless, Zerfass et al. (2018) stress that not only the top management level is involved in planning processes, but also the “corporate, business, functional (e.g., communication, HR, IT) or program levels (e.g., communication campaigns)” (2018, p. 499). Furthermore, several authors argue involvement across levels and segments can result in better planning outcomes (Miller et al., 2002; Tavakoli et al., 2017).

In a study by Stadler and Scheidegger (2024), results showed a significant enhancement of strategy knowledge amongst organisation members through enhanced “openness” in strategy processes. According to the authors this built the groundwork for effective strategy implementation (Stadler & Scheidegger, 2024). In regard to strategic communication plans, Holtzhausen et al. (2021, p. 149) state the most effective plans are those looking at the stakeholders first and then form strategies to meet the stakeholder realities accordingly. Nevertheless, as mentioned, the inexistence of a clear definition and a large amount of research on strategy do not allow a simple answer on how to develop organisational strategy. From a more strictly strategic communication background, Zerfass et al. (2018) state, there are three distinct phases in the strategy planning process: (1) strategy formulation and revision; (2) strategy presentation; (3) strategy execution, implementation, and operationalization. Considered as one of the latest trends in strategy and strategizing, the concept of “Open Strategy” incorporates fundamental principles of strategic communication and may align well with the strategy development suggested by Zerfass et al. (Whittington, 2019).

1.1.2 Open Strategy

As established, strategic communication can be more effective when conducted on the basis of collaboration and in a non-manipulative manner (Hallahan et al., 2007; Holtzhausen et al., 2021, pp. 68–70). Open innovation is a concept originating from the information technology (IT) sector, referring to the use of both in- and outflow of knowledge to benefit internal innovation (Cui et al., 2015). The already earlier mentioned “openness” in the context of organisational culture refers to inclusion, participation, and transparency with regard to internal and external stakeholders (Chesbrough & Appleyard, 2007; Whittington et al., 2011). Due to several documented and scientifically proven benefits for organisational problem solving, for example through crowdsourcing or in form of open source software, the open innovation concept led to the creation of the interdisciplinary concept “open strategy” (Amrollahi & Rowlands, 2018; Chesbrough & Appleyard, 2007).

Chesbrough and Appleyard (2007) highlighted in a first explicit usage of the term the idea-sharing with external parties by combining “open innovation” and “open coordination”, arguing that open strategy “balances the tenets of traditional business strategy with the promise of open innovation” (2007, p. 58). As many of the drivers of open innovation are applicable for a similar, decentralised approach within strategy, a wide range of authors agree that openness extends to strategy more generally (Chesbrough & Appleyard, 2007; Whittington et al., 2011;

Wolf & Floyd, 2017). Furthermore, Whittington et al (2011) define open innovation as a subset of open strategy, as innovation is simply one part in the strategy process that is potentially subject to openness. The authors stress that open strategy should extend outside the corporate elite and include high- and low-tech, as well as public and private organisations alike (Whittington et al., 2011).

Coming from a business background, Birkinshaw (2017) suggests four aspects of open strategy, with the most relevant from a strategic communication standpoint being “generating collective buy-in and action in line with a chosen course of action” (p. 424). It describes the ability to not only drive involvement in formulating strategy, but moreover to enable the people involved to shift their attitudes and behaviour “to implement a chosen way forward” (Birkinshaw, 2017, p. 424). Early involvement will increase the levels of “collective buy-in”, leading to higher engagement and effectively better decisions (Birkinshaw, 2017). Accordingly, research proved that the degree of openness inside an organisation has a strong positive effect on strategy knowledge, regardless of hierarchical levels (Stadler & Scheidegger, 2024).

Hautz et al. (2017) identified several central dilemmas of conducting open strategy, highlighting the risks and potential cost that may come with the mentioned benefits. The “dilemma of process” refers to the content improvement through inclusion of a wider audience on the one hand, which is simultaneously complicating the decision-making process on the other hand (Hautz et al., 2017, p. 301). Addressing this issue from an innovation focused perspective, Dobusch et al. (2017, p. 21) have identified three different dimensions in terms of openness: “(1) the range of people participating in the communication (social dimension), (2) the range of topics (factual dimension), and (3) the range of purposes of communication (temporal dimension)”. The authors suggest the greater the degree of communication across these dimensions, the more complex the communication process becomes. As limited capacities to handle communicative complexity limits the degree of openness, usually increasing openness in one dimension results in less openness in the other two (Dobusch et al., 2017). Put into practical context this could mean that enhancing openness in the social dimension by including more people in strategizing, will limit openness in the increased variety of topics and approaches (capacitated complexity). Therefore, openness in strategy formulating processes should strictly consider resource capacities in all three dimensions.

Nevertheless, such potential risk factors could arguably be outweighed by the improvement open strategy portrays when compared to the negative image that society and academics have of the propagandistic elements in public relations (Bakir et al., 2019; Idris, 2019). Concerning PR, Falkheimer and Heide go as far as stating the field “appears to be cemented in a traditional

epistemology, and there is a clear need for new perspectives (...) to evolve and raise its status and social significance.” (p.80). As open strategy is able to generate shared meaning by disclosing the strategic process, goals and tactics, it is to be regarded as valuable to the cause of strategic communication. Moreover, Falkheimer (2014) promotes openness and transparency as existential justifications for strategic communication in organisational development. Therefore, in regard to developing and executing strategic communication, an integration of the open strategy perspective promises greater inclusion and openness for both internal and external stakeholders, as well as greater cooperation and a wider range of strategic options, ultimately benefitting strategic communication (Falkheimer & Heide, 2022b; Gegenhuber & Dobusch, 2017).

1.2 Planning and executing strategic communication

In order to have influence and persuade the stakeholders, effective strategic communication dictates intentional communication directed at a target audience with a specific message utilizing suitable communication channels (Holtzhausen et al., 2021). Hence, a key element in strategic communication is planning, requiring the leaders of an organisation to think ahead and determine how to achieve positive outcomes (Falkheimer, 2014). Planning in strategic communication in turn, relies to a great extent on research – vital for gaining relevant information, and providing better outcomes through knowledge about resource efficiency and effective decision making (Holtzhausen et al., 2021). Hence, every strategic communication effort should be based on solid research, which should be conducted further throughout the whole process (Van Ruler, 2021). In the planning phase the goal of research is to help identify strategies and tactics, whilst during a communication campaign research aims to monitor the process (Elias et al., 2002). After a campaign has ended, research may be conducted to analyse the outcomes in comparison to the appointed objectives, determining the level of success of the campaign (Holtzhausen et al., 2021).

Hallahan (2015) identified four steps in his definition of executing strategic communication: (1) analysing the situation, (2) conducting primary research, (3) allowing goals and objectives to be developed, and finally (4) formulating strategies and tactics. Although in practice and research often used interchangeably, organisational goals describe “high-end results that centre on organisational activities”, whilst communication objectives signify “lower-order outcomes that involve people’s behaviours” (Hallahan, 2015, p. 248). Following Hallahan’s (2015) definition on strategic communication planning, goals and objectives build

the foundation on which strategies and tactics are built. Other authors have further elaborated on these five steps in perspective of formulating a communication plan. Widely known amongst public relations, marketing and advertising scholars, a communication plan is an integral tool in setting objectives and measuring the outcome (Austin & Pinkleton, 2006).

However, as for the mentioned conceptual differences, a communication plan in the field of strategic communication has to be differentiated from one in public relations (Van Ruler, 2021). The communication plan can be considered the core of classic strategic communication management, as it aligns the communication efforts with the mission, objectives, goals and strategies and tactics of the organisation (Potter, 2006). Furthermore, it outlines the intended communication actions aiming to support particular organisational objectives, including the timeframe, budget, and methods for assessing communication outcomes (Potter, 2006). Holtzhausen et al. (2021) use the term “strategic communication plan” to describe a framework in developing and executing “classic” strategic communication in practice. Other more “innovative” approaches, such as the strategic communication framework by Van Ruler and Körver (2019), follow the same principles of strategic communication but differ in the execution. This means they include similar, often identical features necessary for planning communication, however they fundamentally differ in their interpretation of the role of strategy and the execution of strategic communication.

According to the approach by Holtzhausen et al. (2021, p. 61), *Approach A*, strategic communication planning and execution consists out of three stages: foundation, application, and implementation. Defining the organisations vision, mission, and values lays the foundation for the application stage, which includes problem identification and objective setting, thus forming strategic communication solutions aiming to tackle the respective issue (Holtzhausen et al., 2021).

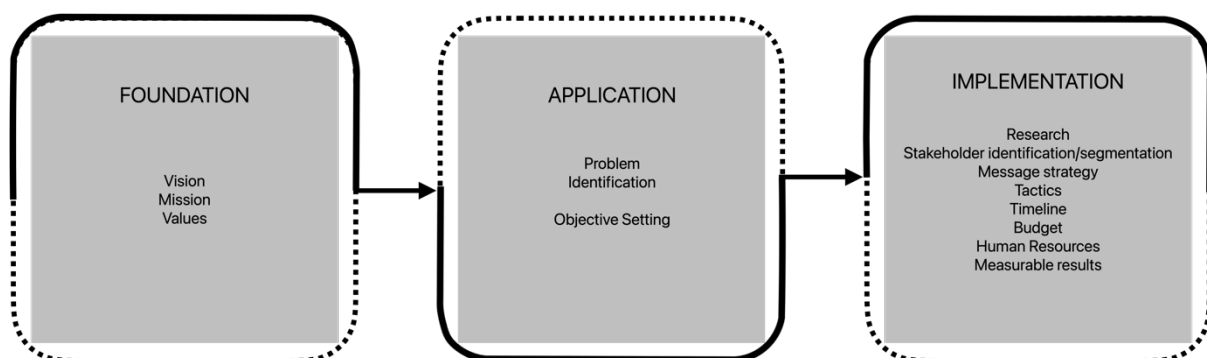


Figure 2; Approach A

Contrary to the instincts of someone who might not be familiar with strategic communication, creating the communication of the central message to an audience comes at the very end (Holtzhausen et al., 2021). According to the authors, typically organisations apply a cascading approach to planning, which follows a hierarchical order starting from the organisation’s mission, over to each department’s plan, resulting in a communication plan which feeds into diverse communication outlets (Holtzhausen et al., 2021, p. 151). Compared with classical communication plan designs, which would focus mostly on the details of the implementation stage, the strategic communication plan additionally includes the foundation and the application stage, converging all aspects, effectively following the holistic perspective of the concept of strategic communication.

Similarly, and particularly in the light of emergent strategizing and agile leadership, Van Ruler (2021) approaches the development of strategy as creating a whole narrative rather than just completing different phases. With an emphasis on agility, the author established a building blocks method, called the Communication Strategy Framework (see figure 4), which does not introduce distinctively new planning elements but aims to allow a more flexible approach to communication planning (Van Ruler & Körver, 2019). The author criticises current planning models offer few options to adapt to change and are focused too much on details of long-term outcomes. Van Ruler (2021) states that communication professionals favour it over classic communication plan models as it enables to visualize the best options for the best strategy.

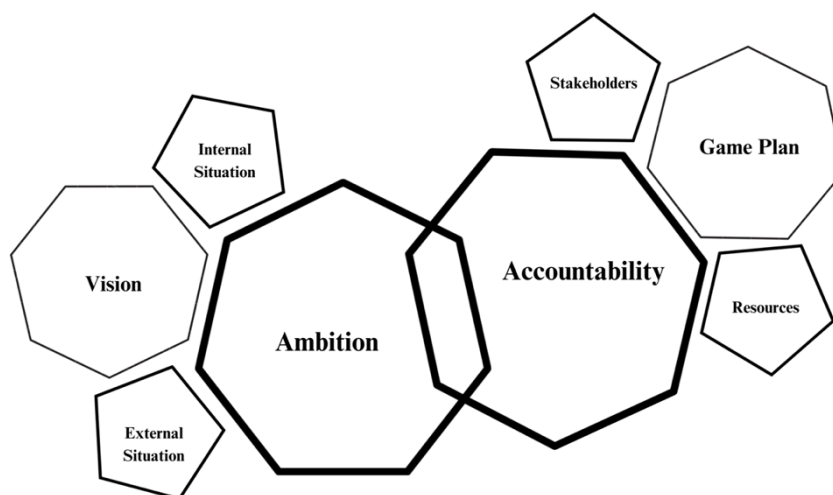


Figure 4: Approach B

Key in Van Ruler’s approach to strategic development is to start the process with a clear vision on communications and the belief in their added value towards the organisations’ mission (2021). The agile method is designed to respond to change rather than providing a

detailed plan to be followed. Accordingly, the building block method allows the necessary information to be presented on one sheet/slide (one-pager), because the necessary cross-functional collaboration favours the vital information to be accessible and flexible – instead of complicatedly planned-out inside a long report (Van Ruler, 2021; Van Ruler & Körver, 2019). In fact, for actual use in practice, Van Ruler and Körver (2019) suggest fixating a large version of the building block sheet on the wall and use small notes to be added or removed in the course of the process. However, Van Ruler states that final choices inside of the building blocks must be clear, resulting in a precise image of the communication strategy. Still, Van Ruler and Körver stress, the framework does not prescribe the best strategy, it rather helps practitioners to select the best choices for the best strategy.

As opposed to *Approach A*, *Approach C* follows a more functional relationship between the elements. Falkheimer and Heide (2022b) argue communication strategy needs to be dynamic whilst including typical elements of classic strategy development. These can be summarised in six distinct areas, which would be elaborated step by step in a formulated strategic communication plan:

- Benchmark and situation analysis (analysing communication effects concerning reach, attention, attitude, etc.)
- Defining objectives and targets
- Target group and stakeholder analysis
- Message and content creation
- Media (selecting channels, platforms, and actors for spreading the message)
- Evaluation and measurement (of strategy execution connected to objectives and targets)

Evidently, Falkheimer and Heide (2022b) put an emphasis on imbedding research within the process. Like the other two approaches, a situation analysis (including benchmarking) is set before the objective and target setting, as well as stakeholder analysis before the message and content creation. Unlike the other approaches, the final step is another research element and consists out of measuring and evaluating the whole process. In terms of actual layout design the authors do not specify in detail, however they emphasize engagement and dialogue with stakeholders, as well as high ethical standards. Commitment to corporate social responsibility and transparency in the processes ensure compliance of ethical guidelines and stakeholder engagement (Falkheimer & Heide, 2022b). The authors argue against the two stereotypes of communication professionals portrayed in most literature, being a strategist or a technician, by stating that in practical work there is no such division. Instead, they propose the

term “strategic doers” and a focus on the organisation’s main strategic communication goals (see figure 5).

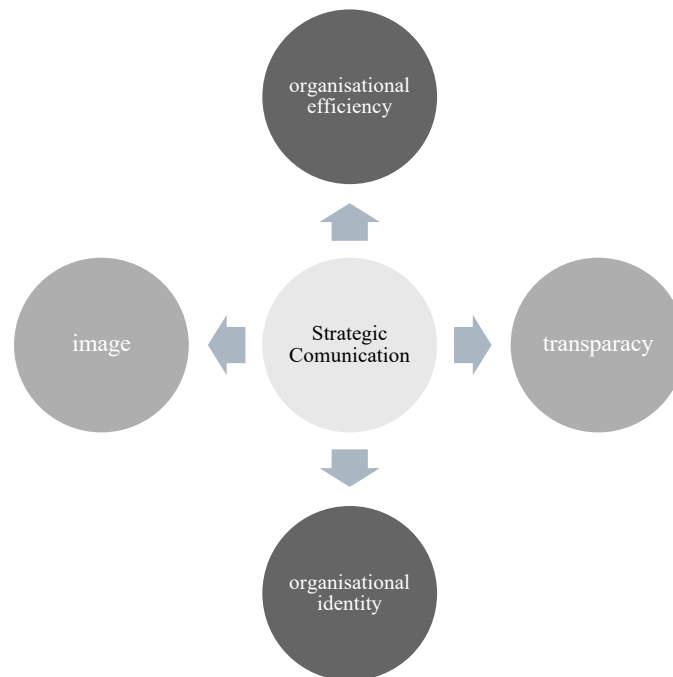


Figure 5: Approach C

Although different in their design, the approaches *A*, *B*, *C* to planning in strategic communication mentioned above by Holtzhausen et al. (2021), Van Ruler (2021), and Falkheimer and Heide (2022b) show several conceptual and contextual similarities. Since Holtzhausen and Van Ruler have been directly involved in Hallahan’s et al. (2007) base-laying definition, naturally their perspectives on strategic communication align. Falkheimer and Heide published several papers on strategic communication and its application in temporary practice – referring to the perspective proposed by Zerfass et al. (2018) and Nothhaft et al. (2018) – which are built upon the fundamentals of Hallahan et al. (2007). All three explained models share five basic areas that must be covered when conducting a strategic communication plan. These areas may be named, weighted, ordered differently within the three approaches. However, the conduction and the research or communication methods used in these areas are often the same. In the following five subchapters the different areas of strategic communication planning in the context of the study subject will be discussed together in detail. Theoretical background of the tools involved in developing strategy and communication plans will be explained and compared, including the differences between approaches *A*, *B*, and *C*. This way the core aspects of strategic communication planning will be covered most extensively,

allowing a better adaption in the final project part. Then the findings may be optimally applied for the specific purpose of this project.

1.2.1 Vision, Mission, and Values

As mentioned beforehand, by formulating vision and mission statements the organisation lays the foundation for further strategy development, often also described in the literature as the strategic starting point (Bekkers & Mandour, 2016). Commonly these statements are written using formal language and designed to publicly reflect the organisations self-understanding, for which regular review has to be ensured (Patterson & Radtke, 2009). Together with the organisational values, in terms of ethical, economic, and cultural principles, the organisation indicates the direction in which it aims to proceed, and hence on which basis the strategy will be developed (Holtzhausen et al., 2021). Often these statements are publicly displayed (e.g. on the website) and shape the external perception. Besides a marketing tool, organisations can also use these statements for internal communication to guide employees and inform about strategic decisions (Alegre et al., 2018).

In the three stages of strategic planning and execution (foundation, application, and implementation) suggested by Holtzhausen et al (2021), vision, mission, values form the foundation stage. According to the authors each component is permanent, as any sort of significant change here would mean major changes for the organisation as a whole (Holtzhausen et al., 2021). Hence, whilst objectives, strategies and tactics may change between campaigns, the three fundamental components remain the same (Johnston & Glenny, 2021). On the contrary, Falkheimer and Heide (2022b) exclude this step in their approach, as their approach is less holistic compared to the other approaches, and more research and outcome driven. As opposed to conducting a full linear process from foundation over application to implementation (Holtzhausen et al., 2021), the authors focus on short-term application and implementation of the strategic communication plan, making the approach more flexible for innovation and adaption (Falkheimer and Heide, 2022b).

The concepts of vision and mission must be distinct, with “vision” being a projection of the organisations’ aspired future, whilst “mission” describes the purpose of the organisation to achieve this potential future position (Mirvis et al., 2010). However, in practice, organisations may combine their vision, mission and values into one statement (S. Kirkpatrick, 2016). Johnston and Glenny describe organisational vision as an aspirational statement expressing “how the organisation looks to the future and the values that guide it” (2021, p. 194).

Continuing, the authors define the mission statement as a “road map of how to chase that elusive vision, often including details of the organisation’s purpose, publics, and position” (2021, p. 194). Kirkpatrick (2017) argues that although the process of creating, communicating and aligning a vision statement may be challenging, it does not require expensive investment. In simple terms, vision stands for “what?”, mission answers “why?”, and values address “how?” (Holtzhausen et al., 2021). In Van Ruler’s approach, which states strategy “implies movement from one’s present position to a desirable but uncertain future position”, the role of a vision statement in the strategic communication process is apparent but interpreted differently (2021, p. 119). In their framework, regarding the building block “Vision”, Van Ruler and Körver (2019) ask which relevant developments are occurring in the in the communication field, and in which ways communication (and the communication practitioner) can contribute towards meeting the organisations’ objectives.

Coming from the field of strategic management and leadership studies, Kirkpatrick (2016) goes as far as considering the vision statement as the very foundational core concept of a company. In general, according to the author, in a business environment vision statements are used to both communicate with stakeholders as well as to differentiate the company from competitors. Usually involving senior management, the vision statement is conducted with a broader mindset that goes beyond the day-to-day business, and often consist out of a lose but confident formulation of the organisations’ ambitions (Kenny, 2019). Taking an example from the healthcare industry, the Mayo Clinic, which is considered one of the leading hospitals in the world, their vision statement was formulated as follows (2024): “*Transforming medicine to connect and cure as the global authority in the care of serious or complex disease.*” (Mayo Clinic, 2024). The corresponding mission statement is formulated similarly concisely: “*Inspiring hope and promoting health through integrated clinical practice, education and research.*” (Mayo Clinic, 2024).

Evidently, this mission statement includes strategic measures towards realising the vision, however it does not include a detailed description of tactics. Although not strictly necessary, other examples of statements are more detailed and subsequently less compact, such as the mission statement of another benchmark institution in the healthcare sector, the Johns Hopkins hospital (2024):

“The mission of Johns Hopkins Medicine is to improve the health of the community and the world by setting the standard of excellence in medical education, research and clinical care. Diverse and inclusive, Johns Hopkins Medicine educates medical students, scientists, health care professionals and the public; conducts biomedical research; and provides

patient-centered medicine to prevent, diagnose and treat human illness.”(Johns Hopkins Medicine, 2024)

The Charité Clinics in Berlin, Germany, are considered one of the leading healthcare institutions in Europe, have published the following statement. Interestingly, it includes concrete strategic measures for accomplishing the vision and mission, following an approach with characteristics of the concept of open strategy:

“Over the next decade, Charité will strive to become the driving force behind a value-based approach to the continuous development of the healthcare system. We aim to position ourselves at the forefront of academic medicine by leading in the areas of education, research, translation and medical care. (...)” (Charité-Universitätsmedizin, 2024)

These three mission and vision statements were chosen as examples because the organisations behind them operate in the same sector, sharing the purpose of education, research and provision of healthcare. Although the approaches differ in their execution, the statements state a PR representation of the general self-understanding and self-given purpose of the organisation and a broad roadmap on how to sustain or achieve these definitions in the aspired future. Taken from the respective organisations’ websites, the three exemplary statements represent a more traditional approach and hence align with *Approach A*’s understanding of how to conduct the “Foundation” stage.

In contrast, whilst in *Approach B* also Vision is also seen as a strategic starting point, providing meaning and guidance for the people involved, it rather serves as an analysis tool for the internal and external situation. “Vision” should focus on the optimal function of communication both within the organisation and on its behalf – highlighting the added value provided by the communication department or team. (Van Ruler, 2021). Thus, the aim is not to provide a statement but instead answers to the questions “which relevant developments are occurring in the communication field?” and “How can communication contribute to achieve the organisations’ objectives?” (Van Ruler, 2021).

1.2.2 Situation and Stakeholder Analysis

In *Approach A* analytical research has partially begun in the “Application” stage in form of the problem identification on which the strategic objectives were built. The problem identification results in a problem statement, later more intensive research is conducted focusing on situation and stakeholders (Holtzhausen et al., 2021). The authors suggest conducting product or brand overview, stakeholder analysis, and a competitive analysis respectively. Similarly, *Approach C* locates the objective and target setting in between a situation analysis and a stakeholder

analysis. Specifically, a benchmark and situation analysis is the basis for the objectives and target (or goal) definition, followed by target group and stakeholder analysis. This demonstrates the linear perspective of *Approach C* similar to *Approach A*, however, conducting an extensive situation analysis (with focus on communication effects) before defining objectives and targets allows *Approach C* to have more strategic options than *A*, where the situation analysis is conducted later.

Fundamentally contrary to this, *Approach B* is emphasizing emergent strategy perspectives, responding to changes in the environment and therefore focused on agility. Analysing the surroundings inhabits extra importance, hence the two separate building blocks for internal and external situation, as well as one for stakeholders. However, as all the blocks are not following an order, they can be changed throughout the process. Van Ruler and Körver (2019) believe that responding to change is more effective than strictly following a plan. They argue that investing time and effort into every minor detail is unproductive. While having a clear vision and ambition is crucial, it is essential to continuously question and reassess operational choices. Therefore, *Approach B* avoids excessive detail in objective and goal setting and focuses only on guiding the most significant decisions based on constant awareness of the situation and stakeholder environment. One way to create broad, holistic awareness of a complex situation is conducting a PESTLE-Analysis (Achinas et al., 2019; Christodoulou & Cullinane, 2019).

Although implemented in between and around strategic formulation steps in the three approaches, the situation analysis is regarded by many scholars and practitioners to be the foundation of strategic communication, contextualising the baseline outset of research in the strategic process (Hallahan, 2015; Johnston & Glenny, 2021). By analysing the recent history and the temporary situation of the organisation, a framework can be established to identify critical gaps of information or other problems, as well as opportunities (Hallahan, 2015). Carrying various designation, generally speaking, the situation analysis asks for the reasons for the current internal situation of the organisation and whether discovered factors can be identified as problems or opportunities (Johnston & Glenny, 2021, p. 214). Furthermore, it is important to identify external factors impacting the organisations' ability to communicate and evaluate existing communication and potential resources (Johnston & Glenny, 2021, p. 214). Also referred to as "environmental scanning", the organisation must make assumptions about the external environment in relevance to the achievement of the mission (Potter, 2006, p. 81).

One option for identifying problems and opportunities inside the organisation in practice, Austin and Pinkleton (2015) suggest building a problem statement, consisting out of six

questions: “*What* is the Problem? *Where* is it occurring? *When* is it a problem? *Who* is the target and for *whom* is this a problem? *Why* does this threaten the organisations’ ability to fulfil its mission?” (Austin & Pinkleton, 2015, pp. 23–24). The problem statement aims to help the entities involved understand the reasons for action and anticipate the goals of the strategy (McGaghie et al., 2001).

Another feasible approach, which includes both the internal and external environment of the organisation, is the widely known and scientifically accepted SWOT analysis, short for strengths, weaknesses, opportunities, and threats (Helms & Nixon, 2010). A SWOT analysis is used across many different fields and industries to serve as a preliminary step to strategic planning, usually conducted by a panel of experts capable of evaluating the organisation from a critical standpoint (Glaister & Falshaw, 1999; Valentin, 2001). It identifies and addresses the challenges faced by the communicative entity in reaching the set goals. Aligning with the outside-in approach, an efficient SWOT analysis is including the stakeholders’ perspective, rather than focusing only on the organisation (Holtzhausen et al., 2021, p. 149).

Typical tools for communication practitioners to collect background information, as suggested in Holtzhausen et al.’s (2021) elaboration on *Approach A*, are benchmark analysis, media analysis and quantitative surveys (Falkheimer & Heide, 2023, p. 68). In *Approach A* the SWOT analysis is utilised to create the problem statement. Holtzhausen et al. (2021) visualise the SWOT analysis in a simple contingency table (see figure 6).

	internal	external
opportunities	STRENGTHS	OPPORTUNITIES
challenges	WEAKNESSES	THREATS

Figure 6: “SWOT Analysis Matrix”

Focusing on the external environment, a corporate situation analysis may include a product or brand overview, a competitor analysis, as well as a stakeholder analysis (Holtzhausen et al.,

2021). Within the product or brand overview, historical backgrounds, distribution channels, pricing, market shares and positionings are outlined together with existing communication strategies (Holtzhausen et al., 2021). Competitor analysis is the process of identifying industry competitors and their marketing strategies (Zajac & Bazerman, 1991; Bergen & Peteraf, 2002). It is regarded as vital to the strategic planning process in highly competitive environments, up and foremost in the context of business management and marketing, where companies for example use automated web tools to track competitor activity (Bergen & Peteraf, 2002; Fong, 2012). Whereas competitor analysis solely focuses on the strategic approach of the competition, stakeholder analysis shifts attention to the entities involved directly with the organisation, internally and externally (Brugha & Varvasovszky, 2000).

Stakeholder analysis is a popular approach in research and management for systematically generating and analysing qualitative information about the behaviour, interests, intentions, and interrelations of the stakeholders, in order to determine whose interests should be factored in when formulating a project or a policy (Schmeer, 1999; Varvasovszky, 2000). Stakeholders are single individuals, collectives, or other entities that possess an interest or concern in the activities, decisions, or outcomes of an organisation or project (Mason & Mitroff, 1981; Schmeer, 1999). The classic stakeholder literature dates to the Stanford Research Institute's developed concept of 1963, consisting out of organisation theory, systems theory, corporate planning, and corporate social responsibility (CSR) (Brugha & Varvasovszky, 2000; R. E. Freeman, 1984; Schmeer, 1999). A stakeholder approach to strategic management was later developed by R. Edward Freeman in 1984, based on the concerns of managers with increasingly high levels of environmental disruptions and uncertainties (R. E. Freeman, 1984; Elias et al., 2002). Continuing in this evolution, today's use of stakeholder analysis in temporary strategy approaches are focused on responsiveness and agility (see Van Ruler & Körver, 2019), as well as for example in innovation planning in healthcare system (Franco-Trigo, 2020).

According to Holtzhausen et al. (2021), stakeholder analysis should include demographics and purchase cycles, as well as psychographics and usage habits, whereas competitor analysis is focused solely on the competitions' strategic marketing approach (Czepiel, 2021). Since the 1990's, stakeholder analysis has become increasingly popular in the field of health policies and innovations (Brugha & Varvasovszky, 2000). It sets out to aid the conductors of a project, and effectively the organisation, to understand the role and influence of the stakeholders on the project and the decision-making-process (Brugha, 2000; R. E. Freeman & McVea, 2001). One technique to create a visualisation of the stakeholder analysis is to generate a map, where

stakeholders are identified and categorised, especially highlighting their interrelations (Brugha & Varvasovszky, 2000; R. E. Freeman, 1984; Schmeer, 1999). In Van Ruler's and Körver's (2019) framework, stakeholder related information has its own box, highlighting the importance it has in *Approach B* in relation to "Accountability" and the "Game Plan". Other methods include stakeholder matrix and analysis tables (e.g. power-interest-grid), where the stakeholders' influence, importance and attitudes are categorised, and used to identify message tactics (Kennon et al., 2009).

Stakeholder analysis can be deducted individually or in a group, in practice often depending on available resources and time (Varvasovszky, 2000). As generally with qualitative data, a team approach may be more efficient and balanced as individual biases can be compensated for (Varvasovszky, 2000). However, an individual analyst may allow a more consistent approach to the data collection, with higher reliability and more internally comparable data (Varvasovszky, 2000). In combination with the support of a research supervisor or a selected key informant, individual biases can be neutralized, and other perspectives may reveal useful directions (Varvasovszky, 2000). Similar rules apply to the question of internal versus external analysts (Crosby, 1993). Furthermore, whilst in the past PR would create messages to the stakeholders, the modern approach is to create messages that allow communication with the stakeholders (Holtzhausen et al., 2021). In the context of stakeholder engagement, identifying key publics and influencers has gained increasing importance, particularly with regard to the message tactics later on (Franco-Trigo et al., 2020).

In health management, for example, stakeholder analysis is traditionally applied as a tool for an organisation inside the sector (such as a hospital), to locate potential partners or identify future threats, in order to achieve organisational goals and gain advantage over competitors (Blair et al., 1996). Stakeholder analysis has been used in a wide range within the health sector, from assessing the transformation process of healthcare systems to the reshaping of the medicines inventory (Akinçi et al., 2012; J. De Vries, 2011), as well as for the introduction of innovations (Franco-Trigo et al., 2020). In their systematic scoping review, Franco-Trigo et al. (2020) were able to show that stakeholder analysis is conducted worldwide for integrating all kinds of health innovations in the health system, prospectively and retrospectively alike. Therefore, stakeholder analysis is an eligible tool to lay the foundation for planning processes and strategic actions aiming at innovation in the health sector (Franco-Trigo et al., 2020).

Effective stakeholder management in healthcare must be grounded in perpetual learning of all stakeholders and include every affected stakeholder group (Rupčić & Lamovšek, 2019). Healthcare organisations collaborate with an extensive network of stakeholders, including

hospitals, laboratories, physicians, medical professionals, patients, insurers, suppliers, governmental bodies, and media outlets, tackling a wide spectrum of health-related issues and challenges (Rupčić & Lamovšek, 2019). In the last decade research on different facets of human resources within the healthcare sector has significantly expanded, driven by its strategic significance within the industry (Buchelt et al., 2017; Douglas & Ryman, 2003). When analysing the complex macro environment of hospitals, Buchelt et al. (2017) specifically utilized the stakeholder perspective to identify key determinants of hospital resource management. The use of stakeholder theory in healthcare and human resource management can be found in various international studies (Akinci et al., 2012; J. De Vries, 2011; Franco-Trigo et al., 2020; Noack & Storath, 2022; Rupčić & Lamovšek, 2019).

1.2.3 Goals & Objectives

In the context of organisational communication and management, goals and objectives are often interchangeably used terms without clear distinction (Austin & Pinkleton, 2015; Hallahan, 2015). Hallahan (2015) distinguishes them in organisational goals and communication objectives. The author argues that specifically formulated goals and objectives do not only provide a foundation for the planning and evaluation process, they are also indispensable for the strategy and message development. According to Hallahan (2015), the goals of an organisation are aligned with the vision or mission, and value statements, focusing specifically on problems or opportunities identified in the situation analysis and the research process. *Approach A* visualises this with the three blocks (“Foundation”, “Application”, “Implementation”), following a fix order indicated with the arrows. As “higher-order outcomes that centre on organisational activities” they are established as benchmarks to fulfil the organisations vision and mission (Hallahan, 2015, p. 248). Objectives on the other hand should focus on what strategic communication can achieve by itself when aimed at short-term outcomes. Organisational goals as the end result do not necessarily have to include communication activity, whereas the communication objectives are the imminent outcome of strategic communication activities, necessary in meeting the goals (Hallahan, 2015).

Nothaft and Schölzel (2015) suggest to conduct objectives using the SMART criteria and that they should be based on a secure diagnosis including detailed tactics. The SMART criteria is an acronym that stands for “S=specific; M=measurable; A=attainable; R=relevant; T=time sensitive” (Potter, 2001). The SMART criteria may be used by communication practitioners, and in *Approach A & C*, to create strong and precisely formulated objective statements for a

communication plan (Holtzhausen et al., 2021). To summarise a complex objective, so-called rationale statements are used to highlight the intention and the research findings the objective is based on (Holtzhausen et al., 2021). In *Approach B* the authors suggest defining the “core values” driving the communication efforts and define the “core tasks” to be accomplished during the process. The difference to the aforementioned mission, vision, values statements, is the specification on the communication front of a specific goal of the communication department, as opposed to the general positioning of the organisation (Van Ruler & Körver, 2019).

Modern public communication is based in a hyper-digital environment, which has organisations dealing with several audiences and stakeholder groups at once when creating messages (Hallahan, 2015; Hepp, 2020). Therefore, the objectives must be formulated with consideration for the future communication to the different stakeholder groups. A planning matrix can help with organising the different objective statements and coordinate them together with the connected steps regarding strategy and tactics, as well as define the specific target audience for the messages and a timeline reference (Holtzhausen et al., 2021). Allocating all information on one page aligns with the principles of the “one-pager” method in *Approach B*, providing clarity in the process of attaining the goal (Van Ruler, 2021).

1.2.4 Strategy and tactics

Strategy and tactics build the functional part of the strategic communication plan (Holtzhausen et al., 2021). As mentioned in the beginning, the term “strategy” has a military background, referring to the art of “planning and directing overall military operations (...), focusing on overall and long-term goals” (Falkheimer & Heide, 2023, p. 67). Additionally to this, the term “tactics” originates from the Greek word “taktike”, which refers specifically to arrangement of the soldiers in the battle formation (Falkheimer & Heide, 2023, p. 67). Hence, whilst the strategy is concerned with the overall objective and the long-term goals, tactics focus on short-term measurements like implementing a communication plan (Holtzhausen et al., 2021; Johnston & Glenny, 2021). In other words, strategy is more macro-oriented than tactics, which means strategy is focused on the comparative benefits and overall performance of an organisation (Barney, 2002; Douglas & Ryman, 2003). Strategy in the military context focusing on overall long-term goals like achieving peace, transfers to the civil context as being about where the organisation is now, how other actors may be persuaded, and adapt to internal and external forces (Falkheimer & Heide, 2022b). Tactics in the military context, having the goal

of defeating the enemy in a given battle by setting up soldiers in a certain way, converts to the civil context as winning a competitive situation by certain means and approaches (Falkheimer & Heide, 2022b).

According to several authors with a PR background, carefully selected and combined tactics are characterised by taking into account timing, context, cost and opportunity, as well as reach and ethics (Austin & Pinkleton, 2015; Johnston & Glenny, 2021). Werder (2015) kept to a broader strategic, as opposed to tactical, perspective on public communication campaigns. She posited: “a strategic communication campaign is a set of deliberate and purposive communication activities enacted by a communication agent in the public sphere on behalf of a communication entity to reach established goals that are informed by multiple perspectives” (p. 80).

Partially related to this perspective, especially regarding the focus on establishing goals, is the more classic *Approach A* by Holtzhausen et al. (2021). The approach may be described as goal-oriented, linear, or channeled, is following traditional strategy planning approaches and locates the strategy and tactic development in the final implementation stage. According to Holtzhausen et al.’s (2021) strategic communication plan proposal, step one and two is the mentioned research and stakeholder segmentation, which build the contextual basis for the following message strategy. As the fourth step of eight, the tactics refer to the conveyance of the message. Including media selection and communication techniques, the message tactics aim to portray the organisation by sharing information and values. For a practical execution, the authors suggest various communication tools: organisational communication channels (e.g. employee newsletter; employer branding), traditional and digital media outlets for classic advertising (e.g. digital targeting) or interpersonal communication (e.g. organisational involvement), as well as experiential marketing (e.g. holiday events; fundraising).

Taking the example of the hospital industry, Douglas and Ryman (2003) showed that hospital managers are able to establish favourable competitive positions and reduce certain adverse impacts of the market structure by developing and sharing their strategic competencies through strategic actions. For example, during the COVID-19 pandemic, hospitals faced an unprecedented, ever-changing environment which required agile tactics throughout the organisation (Delbosc & Kent, 2024). Notably, nurse-led innovations proved to be a highly effective tactic in meeting patients’ needs and administrating new processes (J. Phillips et al., 2021). All healthcare systems are facing significant pressures and frequently struggle to deliver the aspired standard of care (Page et al., 2023; Rees et al., 2021). Organisations, managers and individual health workers continuously adjust to these pressures, often through improvised,

highly variable actions, which tend to lack coordination across clinical teams (Amalberti & Vincent, 2020). Aligning with Van Ruler and Körver's (2019) perspective, regarding the systematic constraints and patient safety, Amalberti and Vincent (2020) suggest healthcare organisations must learn to manage risk instead of striving for absolute safety. Based on these beliefs, Page et al. (2023) of the University of Oxford have developed two frameworks providing healthcare professionals to react to organisational threats and also serve as foundational training and education for professionals on effective strategies. The framework is divided into "anticipatory strategies", which prepare for pressures, and "on-the-day adaptations", which manage immediate pressures on health services. This represents a feasible combination of strategic planning and agile communication in a healthcare setting.

Agility is the keyword for Van Ruler's and Körver's (2019) framework, however, they prefer the term choices instead of tactics, as tactics is being too closely connotated with detailed objective planning as part of deliberate strategy. *Approach B* utilises the building blocks "Ambition" "Accountability" for defining core tasks and values, as well as responsibilities and KPIs. However, it is only later in the "Game Plan" where the operational strategy and the planning schedule with priorities outlines the tactical choices which guide the specific actions (Van Ruler & Körver, 2019). In "Ambition", the authors define the "core tasks", which are the specific "things" that need to be achieved on the communication front, following the results from internal and external analysis (p.74). The authors avoid using the term "targets" as the core tasks do not pertain to specific figures or percentages.

In context of contemporary trends in strategic communication research and practice, focusing on adaptive and flexible characteristics such as emergent strategy and agile communication plan frameworks (Van Ruler, 2021), strategies and tactics must align accordingly. Exemplary, classic methods in the field of crisis communication – criticised for being top-down, rigid, and not based on the fast-paced realities of today – are exchanged for approaches including less written plans and routines but more learning processes and improvisation (Eriksson, 2015).

1.2.5 Evaluation

Evaluations are carried out throughout the whole strategic communication process, before (pre-tests and benchmarking), during (ongoing campaign evaluation), and afterwards (summative evaluation) (Holtzhausen et al., 2021). When individuals or organisations choose to employ strategic communication to achieve their goals, they must determine how to distribute limited

resources, craft efficient messages, as well as identify and prepare for potential obstacles (Goldberg & Gustafson, 2023). The SMART method for creating specific, measurable, attainable, relevant, and time-specific goals and objectives, dictates the final evaluation whether the strategic communication efforts were successful or not and to what extent the employed tactics functioned (Holtzhausen et al., 2021).

Holtzhausen et al. (2021) state three different types of results to be measured: communication outputs, outcomes, and actual business results. Outputs refer to the measurable results of a campaign's tactics, representing the tangible products, activities, or accomplishments that impact communication channels (e.g. message impact, frequency, website-clicks). Outcomes measure the direct or indirect impact of a communication campaign on the target audience and stakeholders on the perception and behaviour level (e.g. opinion, attitude, credibility). Determining outcomes can be challenging but is crucial for strategic communicators during the evaluation process, often achievable through basic surveys or discussion groups with targeted stakeholders to assess whether the communication activities are driving change (Holtzhausen et al. 2021). One method to measure business results is to calculate the return of investment (ROI), the proportion of profit generated from an activity in relation to its overall cost (J. J. Phillips, 1996). The ROI is calculated by subtracting the cost of investment from the gain of the investment, divided by the cost of investment (Holtzhausen et al, 2021).

Approach B focuses in the "Accountability" block on defining responsibilities whilst also establishing key performance indicators (KPIs) to evaluate the impact of the communication efforts (Van Ruler & Körver, 2019). The authors differ between hard and soft KPIs, referring to hard factors like financial performance (numerical targets), and soft factors such as innovation spirit (creative targets). Beyond the task of establishing effective KPIs, it is also essential to develop reliable methods to assess whether the desired outcomes have been achieved and if they remain feasible (Van Ruler & Körver, 2019). In practice, communication professionals often utilize media analysis, force field analysis, and multi-stakeholder studies as primary tools for evaluating performance and alignment with objectives (Van Ruler & Körver, 2019).

1.3 Global strategic recruitment and selection

In the light of global competition over workforce multinational organisations must prioritise human resources (HR) and are willing to make substantial investments in the areas “global talent management”, “talent acquisition”, and the corresponding recruitment strategies, to attract and retain potential and current employees (Banks et al., 2019; J. M. Phillips & Gully, 2017; Tarique & Schuler, 2010). Whilst the Covid-19 pandemic has enabled organisations to attract talent beyond traditional borders through remote and hybrid work models, it also led to a re-definition of employee expectations regarding work flexibility, work-life-balance, and organisational support (Delbosc & Kent, 2024; Ferreira & Gomes, 2023). The 2024 study on talent scarcity in the global economy by the *ManpowerGroup* revealed that globally around 75% of companies report talent shortages and hiring difficulties. Amongst all industries, healthcare and life sciences have the highest talent shortage rate of 77% (ManpowerGroup, 2024). Whilst some companies are able to offer large financial compensation, the majority of organisations is and must look for more sustainable long-term solutions to attract and retain talent (J. M. Phillips, 2023).

Whether they operate internationally or not, for many European organisations global recruiting has become a recognised factor in human resource management (HRM), as it impacts the number and type of candidates that are ultimately available for recruitment (J. M. Phillips & Gully, 2017). Furthermore, in a healthcare related context, research shows that the smooth operation of HRM processes in hospitals has substantial impact on maintaining consistent quality in patient care (Townsend et al., 2013). From a resource-based perspective, companies must formulate and determine key strategic resources that provide a competitive advantage (Barney, 2001; Mishra & Mohanty, 2022). To gain such a competitive advantage, as a first step, an organisation needs to acquire the necessary talent through recruitment (Breaugh, 2013; Lam & Schaubroeck, 1998). Consequently, the resource-based view provides a comprehensive framework to explain how HRM activities can create positive and negative synergies, which may become strategic resources essential for achieving a sustained competitive advantage (Campbell et al., 2012; Wright et al., 1994). Hence, recruitment must be integrated into the strategic communication of the organisation (Meng & Berger, 2018). The linguistic distinction between HRM and international HRM discussed by some authors (see e.g. Raletic-Jotanovic et al., 2015; Schuler et al., 1993) is disregarded in the following, due to its irrelevance to the following context and the covered areas of HRM.

“Recruitment” refers to the ability of an organisation to “attract a suitably qualified pool of applicants for a vacancy (...) in a cost effective (and) timely manner” (O’Meara, 2013, p. 6). Ployhart et al. (2017) offer a broader, perhaps modernist definition, stating recruitment is the broad set of activities which connects organisation and applicant. Either way, in practice the goal for HR managers is to provide a list of candidates for the selection phase in order to make appointments and fill job vacancies (Holbeche, 2009; O’Meara, 2013). This process begins with generating, sourcing and identifying applicants, subsequently engaging with the candidates, managing their progress, and ultimately influencing their job choice decisions (Breaugh, 2013).

To make (global) recruitment strategic, HR professionals and organisational communicators will have to answer the five questions suggested by Breaugh and Starke (2000): “Whom to recruit?”; “Where to recruit?”; “What recruitment sources to use?”; “When to recruit?”; “What messages to communicate?”. Millmore (2003) states that for recruitment and selection to be strategic, there must be three interrelated basic characteristics present: (1) integration in the grand strategy, (2) a long-term focus, and (3) a method for converting strategic demands into a suitable recruitment and selection criteria. Additionally important in the context of strategic communication is the approach by Gully et al. (2013), who state, the concept of strategic recruitment rests on traditional perspectives in recruitment research (focusing on e.g. effects of website attributes, employer and candidate perceptions, decision-making, or diversity), but it is extending it from the individual level onto the organisational level. In other words, as an expansion from an individual focus towards also considering organisation-level outcomes, strategic recruitment connects and integrates microlevel topics with meso- and macrolevel operations (Gully et al., 2013).

Regarding “Whom...?” and “Where to recruit?”, it is important to note the differentiation of internal and external recruitment (Breaugh & Starke, 2000). Internal recruitment refers to identifying and promoting current employees for additional or different responsibilities/jobs, whilst external recruitment addresses talent currently not working for the organisation (Orlitzky, 2008; J. M. Phillips & Gully, 2017). During the strategic planning process the organisation must define the desired characteristics of ideal applicants and the diversity of characteristics within the candidate pool (Breaugh & Starke, 2000). Relevant features may include skills, knowledge, abilities, motivation and demographic factors (Wilkinson et al., 2019).

The universalist paradigm, dominant in the U.S. and widely adopted elsewhere, seeks to create and empirically test general laws to improve strategic human resource management

(SHRM) and ultimately enhance organisational performance (Brewster, 2012a). This approach assumes that the application of SHRM principles will universally benefit organisations, with much of the research focused on leading-edge practices in large multinational corporations, particularly in the manufacturing and high-tech sectors (Brewster, 2012a; Mashiah, 2021).

Research in HR practices and HRM systems depends to large extends on the socio-economic contexts of the countries it was developed in (Pudelko, 2006). Hence, there are different schools of thought and HRM models. However, adopting management practices from different models suggests that these practices can be transferred from one system to another (Pudelko, 2006). When addressing global recruitment, studies from different countries' perspectives and schools of thought should be considered. Pudelko states that the socio-economic contextual factors of HR practices in the USA and Japan are marking the two opposite ends of the spectrum. The author localises Germany in the middle in regard to cultural, socio-political, economic, and management-related contextual factors. From a European perspective, research and practical insights on HRM are often focused on the global north-west, mostly limited to Anglo-American theories and case studies, however, including perspectives from outside benefits the analysis and opens up new perspectives. Facing similar challenges due to a decline in population, and subsequently a lack of workforce for a large economy and growing demand in the health sector (Wirth et al., 2016), Japanese studies promise additionally valuable insights into HRM strategy and message tactics.

The Japanese approach to HRM is marked by long-term employment, seniority-based pay and promotion, and a strong focus on teamwork (Pudelko, 2006). The emphasis on a long-term relationship is traditionally reflected in promotions and salary increments being based on experience (Morita, 2018). Additionally, companies that follow this Japanese HRM style typically recruit fresh university graduates for entry-level positions (Huang et al., 2020). This emphasis on hiring new graduates leads to a rigid job market, making it challenging for older, experienced individuals to secure new positions or switch careers (Huang et al., 2020). Recent studies from Japan suggest that organisations which provide a sense of uniqueness, belongingness, and performance-based instead of seniority-based employment patterns, will increase the attractiveness of the workplace to international applicants (Huang et al., 2020).

The U.S. American HRM approach, on the other hand, is generally performance-oriented and characterised by an individualistic understanding of employment, emphasising personal responsibility, initiative, and self-reliance (Pudelko, 2006). With a tendency to foster a competitive environment, the American employment culture incentivises performance and the advancement of personal careers, including job changes (Drabe et al., 2015). As a result, the

generally more flexible job market offers more opportunities for experienced employees, whilst relationships between organisation and employee tend to matter less (Brewster, 2012b).

In contrast to these two extremes, the German HRM system, as part of the wider European approach, in many ways offers a middle ground (Pudelko, 2006). While also valuing stability and long-term employment, the German approach places a strong emphasis on vocational training and a dual education system that integrates formal education with on-the-job training (Brewster, 2012b; Keller & Kirsch, 2020; Oeben & Klumpp, 2021). This approach aims to ensure that even younger employees are thoroughly prepared for the demands of their roles, contributing to a flexible job market. Corporate culture and employer-employee relationships are predominantly characterised by balancing seniority with performance-based rewards. Pathways for individual professional advancement is often clearly defined and linked with educational options or vocational training programmes. Despite struggling with demographic changes, digital transformation, and attractiveness issues, the German labour market is associated with social partnership and job security.

Furthermore, the German labour market is notably open to experienced professionals seeking to change jobs or industries, supported by a robust social safety net and active labour market policies facilitating employment transitions, including immigration. Although bureaucratic obstacles remain, the German labour market being forced towards more flexibility, led to promoting workforce mobility but also encouraging continuous professional development, thereby enhancing companies' ability to attract talent with diverse backgrounds and experiences (Bamber et al., 2020; Keller & Kirsch, 2020; Wilkinson et al., 2019). These conditions appeal promising to global recruitment, however, it demands the right communication – especially for lesser-known, domestically operating organisations.

In their 2017 literature review about global recruitment, Philips and Gully state that reasons for choosing between different locations and job opportunities are not yet fully understood. However, it is understood that individuals prioritize key extrinsic and intrinsic work-related factors, such as professional growth, monetary benefits, workplace conditions, job responsibilities, employment stability, and interpersonal connections, which influence career choices and decisions to leave or remain in careers (Kappia et al., 2007). Additionally, the interaction of organisational factors with cultural forces and mentioned employee expectations create a complex variation of challenges (Scullion et al., 2010). Ma and Allen (2009) argue that in the globalized context of recruitment, cross-cultural knowledge about cultural differences is critical. The authors suggest that the relationships between recruitment practice and outcome

along the whole recruitment process is moderated by cultural values, which must be regarded in a strategic communication approach (Ma & Allen, 2009).

Identifying the right recruitment methods and creating a channel through which potential candidates are discovered and attracted to fill vacant positions has gained significant influence on an organisations performance (E. Chang & Chin, 2018; Sołek-Borowska & Wilczewska, 2018). Particularly in knowledge intensive work, such as most jobs in healthcare, effective recruitment is regarded as the most crucial HR function for success and survival of an organisation (Kehoe & Collins, 2017). The quality of information and communication media used in this context (such as written advertisements, company website postings, employee referrals, job fairs, social media, etc.) are crucial factors for attracting potential applicants with matching competencies (Muduli & Trivedi, 2020; Priyadarshini et al., 2017).

Locally operating organisations and those with a comparatively smaller budget have a disadvantage in the globally expanding recruitment market and must adjust their strategy accordingly, especially in regard to recruiting foreign personnel (Bossler, 2016; Tarique & Schuler, 2010). An increasing percentage of foreign workers in the current workforce in Western Europe strengthens the trend of recruiting internationally, aligning with theoretical notions suggesting the presence of foreigners signifies successful international placements (Bossler, 2016). However, globally operating organisations are still more likely to recruit abroad than organisations focusing on a local market, due to budget limitations and inexperience in communicating with foreign audiences and new target groups (Bossler, 2016).

In reference to the process mentioned in the beginning of this subchapter, perhaps the most crucial phase in strategic recruitment is the initial stage where the organisation aims to attract job seekers and encourage them to submit applications (Breugh, 2013; Yu et al., 2022). Success at this stage allows HR managers to create larger and more qualified applicant pools, enhancing their ability to select the best candidates for eventual employment. Should the strategic communication efforts at this point fail and job seekers do not develop an initial attraction to the organisation, they essentially remove themselves from the recruitment process before any formal interactions can take place (Harold et al., 2013).

Digital communication in the form of e-recruitment tools or social media platforms have revolutionised the practice of recruitment through quick application receipts, professional search tools, and efficient feedback provision (Hosain et al., 2020). Online recruitment has transformed the traditional hiring process into a more collaborative process independent of time and location, effectively making direct communication with candidates the main responsibility for HRM (Sołek-Borowska & Wilczewska, 2018). While being praised for agility, cost-

efficiency, and broad reach, concerns about online recruitment's impersonal nature, process control, and job ad accuracy remain, urging organisations to consider stakeholder perceptions for optimisation (Brandão et al., 2019). Through shared data on social networks, from professional career platforms such as "LinkedIn" to video-content based platforms such as "TikTok", defined candidate profiles can be targeted and messaged by the employing organisation (Ruparel et al., 2020).

If not as a primary method, social media serves recruiters as a vital supplement to traditional methods, enhancing comprehensive strategies by offering new, continuously evolving technological tools for low cost and a broad availability of information (Hosain et al., 2020; Laukkarinen, 2023; Madia, 2011). These features reduce recruitment times and can ultimately help achieve recruitment goals, when communicating a targeted message to a defined audience in alignment with the strategic communication process (Lang et al., 2023). Next to website attributes and transparency in the recruitment process, online applicants particularly consider the brand reputation or employer brand – which is a major factor when candidates are being approached directly through social media (Ladkin & Buhalis, 2016).

1.3.1 Employer Branding

In the current climate of high international competition for talent, through different channels and on different platforms, it has become increasingly necessary for HR managers to promote the brand that identifies and sets aside their organisation (Kruskovic et al., 2023; Kumari et al., 2020). Originating from consumer marketing, employer branding is considered key in contemporary recruitment practice (Yu et al., 2022). The concept was first defined by Ambler and Barrow as "the package of functional, economic, and psychological benefits provided by employment, and identified with the employing company." (1996, p. 187). According to Backhaus and Tikoo (2004) employer branding consists out of a company's efforts to clearly communicate what distinguishes it from competitors and makes it an attractive employer, thus building an identifiable and unique employer brand (Theurer et al., 2018).

Such cross-disciplinary, communicative processes for the development of an employment brand, conveys the attributes of working at the organisation to both internal and external stakeholders (Knox & Freeman, 2006). The aim of employer branding is to create sustainable employer-employee relationships, which may also involve aligning HR practices with Corporate Social Responsibility (CSR) (Aggerholm et al., 2011). Other than communicating benefits, employer branding also forms beliefs on how well prospects would potentially fit with

the employment opportunities and options for professional development later on (Aggerholm et al., 2011; P. Heilmann et al., 2022). Furthermore, the organisation must emphasize its distinctiveness to competing employers by cultivating the organisations' image in the job seeker's mind (Lievens & Slaughter, 2016). This involves creating mental connections between the organisation as an employer and the symbolic attributes applicants may value (Lievens & Slaughter, 2016). Marketing principles and techniques are integrated into the employer branding process through recruitment campaigns and continuous communication efforts to increase awareness (i.e., enhance familiarity) and reinforce connections between the employer brand and desirable attributes (Theurer et al., 2018).

A wide range of research has been repeatedly proving the effects of advertising organisational image and reputation on the applicant's intention to seek employment (Keppeler & Papenfuß, 2021; Lee et al., 2011; Love & Singh, 2011). Prospective applicants form opinions about an organisation based on its overall employer brand, which is shaped by their perceptions of the organisation as an employer (Kruskovic et al., 2023). In their examination of the nature and consequences of employer branding, Wilden et al. (2010) state that job seekers assess employer attractiveness based on prior hands-on work experiences with the employer or within the industry, along with the transparency, reliability, and consistency of the employer's brand messaging, perceptions of the employer's brand investments, and the reputation of the product or service portfolio. Consequently, discussions on employer brand image are highly relevant for practitioners in HRM and in the holistic approach to strategic communication (P. A. Heilmann, 2010).

Despite significant advancements in understanding employer branding over the past two decades, research on this topic within the healthcare sector remains relatively sparse (Berry & Martin, 2019; Gapp & Merrilees, 2006; P. A. Heilmann, 2010). In the light of the current personnel shortage and a large amount of recent study results, hospitals and clinics must align their practices and employer marketing strategies with the factors that are most attractive to nurses (Basha et al., 2022; Fréchette et al., 2013). Additionally, the effects of the Covid-19 pandemic on staffing and working conditions in hospitals have increased the necessity for more consideration and re-evaluation of employer branding in the organisations' HR strategy (P. Heilmann et al., 2022; Veldsman & Van Der Merwe, 2022).

A study by Fréchette et al. (2013) was able to reveal that Canadian nursing graduates valued organisational attraction factors such as quality of care, type of work, compensation, and employer branding, with quality of care being the most critical. These insights were subsequently utilized by a Canadian university teaching hospital managers to enhance its

employer branding and attraction strategy, leading to a rise in the recruitment of university-trained nurses (Fréchette et al., 2013). Another more recent study with university nursing students by Heilmann et al. (2022) suggests organisations can specifically enhance their employer brand image for prospective employees through supportive work cultures, HR practices, and targeted marketing. Furthermore, the authors state marketing and HR strategies aimed at young health care professionals are still mostly underutilized. For the few cases of healthcare employer branding, the communication is often limited to stakeholders, industry and organisational advancement (Berry & Martin, 2019).

Still, according to a study by Esslinger et al. (2019), utilization of employer branding in German hospitals is rare and varies between private and state owned organisations. However, there are practical guides for developing strategies to attract and retain skilled personnel through authentic communication and employer branding (see for example Rübsam-Brodtkorb et al., 2019). Moreover, according to a recent study by Pološki and Vokić (2023), the overall attractiveness employees assign to their organisation is significantly positively related with the satisfaction with internal communication – a particular critical area in healthcare facilities (Holá, 2012).

Together with the alignment of HR and CSR, utilisation of social media channels for recruitment, and practical learnings of healthcare-set studies such as by Fréchette et al. (2013), employer branding in healthcare must pursue the goal of clear, authentic, and consistent communication with internal and external stakeholders. Up and foremost, this includes a target-group appropriate presentation of distinct arguments regarding a work culture consisting out of a sustainable and both-way beneficiary relationship between employer and employee.

As a first step, HR managers have to formulate an Employee Value Proposition (EVP), which outlines the specific benefits and values that employees can expect (Backhaus & Tikoo, 2004). The EVP refers to the distinct combination of benefits, rewards, and opportunities an employing organisation provides to its employees in return for their skills, talents, and contributions (DiVanna, 2002). Mortensen and Edmondson (2023) break the EVP down into four interrelated factors: (1) Material offerings; (2) Opportunities to develop and grow; (3) Connection and community; (4) Meaning and purpose.

According to Backhaus and Tikoo (2004) the creation of an employer brand representing a specific EVP is the first step of the employer branding process followed by external and internal marketing of the according messages. External marketing directs the message to the labour market for recruitment, whilst internal communication targets HR and mission goals (Backhaus & Tikoo, 2004). According to Veldsman and Pauw (2018) traditional retention

strategies have become obsolete in the past decade, moving the emphasis towards creating a comprehensive employee experience through a compelling, realistic, and consistent EVP.

As the demands of global marketplaces require employees to engage in different ways with their work and the organisation, employers need to fully realise and address the employees needs throughout the whole employment process (Plaskoff, 2017). In particular, Dr. Veldsman, an established figure in organisational psychology, and strategic HR and leadership sciences, together with Van Der Merwe (2022) call for a reassessment of the influence of employer branding, the employee value proposition, and the employee experience on talent attraction and retention. Similar to Plaskoff (2017), the authors advocate a holistic, human-centred, outside-in approach, which aligns well with the characteristics of strategic communication described above. Plaskoff (2017) and others, such as Panneerselvam & Balaraman (2022), suggest HRM should apply the methodologies of “design thinking” and “human-centred design”, which derive from product development and marketing. These principles allow a deeper understanding of the employee side and a long-term solution to HRM problems as compared to “easy” short-term fixes through perks and material benefits (Gupta & Saini, 2020).

In conclusion, the mentioned approaches in turn underscore the importance of authentic and consistent employer branding to attract and retain talent effectively, especially in competitive fields like healthcare. Overall, robust employer branding, underpinned by a compelling Employee Value Proposition (EVP), is critical for cultivating long-term relationships with employees and meeting evolving workforce expectations (Mortensen & Edmondson, 2023). Successful strategies follow a “human-centred-design” approach with EVPs that emphasize both tangible benefits and meaningful work experiences, which resonate strongly with candidates seeking alignment between personal and professional values (Plaskoff, 2017; Backhaus & Tikoo, 2004). Research suggests that targeted messaging through channels such as social media and internal communications fosters stronger applicant engagement and a positive perception of the organisation’s culture and values (Veldsman & Pauw, 2018).

1.3.2 Cross-national message tactics for unknown organisations

The advancement of digital technologies and social media, which allow for the relatively unrestricted creation, editing, sharing, and exchange of information in various media formats across the public sphere, has profoundly changed how employees and prospects perceive and process information about employers (Leonardi & Vaast, 2017). Although expectations on how employer organisations communicate to employees and candidates have increased, the modern

circumstances present advantages for lesser-known organisations to reach out to a wider audience and communicate targeted messages with limited expenditure (Mashiah, 2021). As a vital tool in digital marketing, targeted messaging helps organisations engage their target audience, effectively enhancing customer satisfaction, conversion rates, and overall marketing success (Luxton et al., 2015). This practice involves creating and delivering customised messages to specific consumer segments based on demographics, preferences, and behaviour (Mashiah, 2021). The same principles come into effect when targeted messaging is used in employer branding for recruitment purposes by organisations looking to break into a new labour market, for example abroad (Breugh, 2013).

As an industry with persistent demand for talent, multinational tech corporations are a leading example in embracing employer branding for recruitment purposes. Contemporary research and practice in HRM, in particular employer branding, is largely dominated by multinational corporations of the tech industry, which face other conditions than most organisations from the health sector, which are often smaller and less-known (Giancotti et al., 2017). However, there is arguably more demand and need for strategic recruitment message development in small to medium sized organisations, due to lower levels of awareness and smaller HRM budgets. Thus, the question remains how locally operating organisations may use employer branding and recruitment marketing tools for strategic communicating outside their operational environment and domestic labour market to attract talent. Monteiro et al. (2020) have developed an employer branding model for small to medium sized organisations, providing competitive benefits for organisations with limited HRM resources. The model is based on the four dimensions organisational culture, company strategy, company reputation, and reward system (see figure 7).

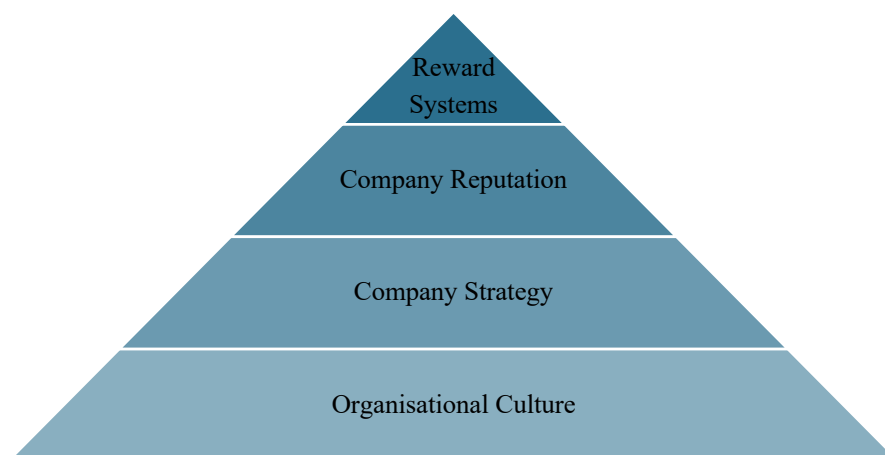


Figure 7: Employer branding model for small to medium sized organisations

What Monteiro et al. call “Organisational Culture” (mission, vision, values) and “Company Strategy” (definition and objectives) has been established earlier in a broad sense, now “Company Reputation” (social networks, society) and “Reward Systems” (benefits) are added – through employer branding and tailored messages communicating the EVP to applicants. Their research specifically provides insights into how lesser-known organisations can leverage recruitment messages to influence job seekers by emphasizing the extent to which the information presented in these messages can be verified (i.e., the verifiability of message claims).

In the initial stages of recruitment, organisational attraction heavily relies on employment advertising, and to effectively attract and recruit location flexible employees, researchers recommend that organisations distinguish themselves by cultivating a unique and appealing employer brand (J. M. Phillips & Gully, 2017). Phillips et al. (2014) observed that the phrasing in job advertisements has been found to interact with a job seeking person’s level of global openness, influencing recruitment results. The authors suggest individuals with a high level of global openness and adaptability were more likely to feel aligned with a job or the organisation when the ad highlighted the company's global presence. In contrast, those with low global openness were less likely to perceive a well-matched fit when the organisation’s global presence was emphasized in the marketing message.

A German study by Asseburg et al. (2018) explores how different framings of recruitment messages (rational versus inspirational) influences application intentions of students. When tailored to transmit meaningful insights about the job role and organisational values, the study found inspirational messages to be more effective, with both person-job and person-organisation perceptions significantly enhanced. Regarding the actual transmission of said information, Luxton et al. (2015) have found that targeted, multi-platform campaigns increase the appeal of roles. According to the study, reaching out through various touchpoints enhances visibility and candidate engagement.

In practice, one touchpoint would be the organisations’ website, which must be utilised for recruitment and employer branding (Gunesh & Maheshwari, 2019). Imbedding accessible, updated and curated information about vacant positions, commonly entitled “Jobs” or “Careers” is a basis for applicant engagement (Gunesh & Maheshwari, 2019). To reach new target groups, organisations have to actively advertise, in other words transmit targeted messages which act as signals (Connelly et al., 2011). Following the signalling theory by Spence (1978), organisations craft targeted messages within job advertisements to convey key signals about their company culture and the role's attributes. These signals are designed to

shape potential applicants' perceptions, aligning their expectations with the organisation's values and demonstrating their suitability for the position. This process enhances the organisation's ability to attract candidates who resonate with its culture and goals (Wilden et al., 2010). In cross-national recruitment on a 'noisy' labour market, these signals become even more vital, as foreign candidates often depend on indirect cues, such as communicating the employer brand and the EVPs, to evaluate cultural fit and determine the organisation's attractiveness from a distance (Chapman et al., 2005). In a 2018 study on the emigration profiles of young Portuguese professionals, Amaral and Marques analysed push and pull factors in relation to the individual motivations and strategies. 65.8% of participants had emigrated with a job previously contracted and primarily used the web page for obtaining necessary information (Amaral & Marques, 2018).

In their study about recruiting across cultures, Ma and Allen (2009) criticise most literature is centred around the U.S.A. and primarily concerns American candidates, under-representing national cultural values as a factor in recruitment research. Thus, the authors propose a value-based model, which aids organisations in carrying out recruitment activities in different cultural contexts. By considering diverse cultural values, organisations can potentially gain a competitive advantage when investing in their people, which is the most crucial organisational resource (Ma & Allen, 2009). According to Wilkinson et al. (2019) in "The SAGE Handbook of Human Resource Management", crafting messages that resonate with local values and highlight opportunities for global career growth can significantly enhance the effectiveness of international recruitment efforts. Furthermore, offering clear support for relocation and integration helps to alleviate potential concerns and positions the organisation as a globally minded and employee-focused employer.

In conclusion, an organisation's employer branding regarding cross-national recruitment should tailor messages to local cultures and values, highlight opportunities of career growth and perks of working internationally, as well as showcase organisational support for relocation and integration processes. Organisations with limited HRM resources may follow the model proposed by Monteiro et al. (2020) and create strong EVPs in accordance with their strategic communication efforts. Message tactics aiming to attract a workforce outside the domestic labour market, which has no prior knowledge of the organisation, would be implemented in all three strategic communication approaches: as "message tactics" for *Approach A*, in the "Game Plan" building block for *Approach B*, and for the step "message and content creation" in *Approach C*.

2. State of the sector: Healthcare systems of Germany and Portugal

Healthcare systems are as crucial for society as they are hard to fully grasp. The complexity surrounding healthcare systems influences the macro, meso, and micro level. To understand the current state of the healthcare systems, as well as related policies and reforms in Portugal and Germany on a macro level, it is necessary to take into account the historic political, social and economic context. A brief analysis of the two health systems and their backgrounds is followed by a direct comparison supported by statistics.

Portugal

Portugal, with a population of 10.4 million and a growth domestic product (GDP) per capita of approximately 42,000 Euro, joined the European Union in 1986 and is regarded as a small to medium-sized economy amongst the European member states. The extraordinary economic and social developments the country has seen since the return to democracy in 1974 have positively influenced the quality and accessibility of healthcare (Costa Lobo et al., 2016; Pollack & Taylor, 1983). The amendment of the Portuguese constitution in 1976 gave every citizen the right to receive medical treatment and was followed by the foundation of the National Health Service (Serviço Nacional de Saúde, SNS) in 1979 (Cantante et al., 2020). Encompassing all integrated healthcare, the SNS possesses administrative and financial autonomy, providing primary care (health centres) and specialised care (hospitals, specialised institutions), which accounts to approximately two thirds of the health expenditure (A. M. Nunes & Ferreira, 2019; Simões et al., 2017).

Based on the Beveridge model, the SNS is funded by taxpayers and provides universal access to healthcare (Cantante et al., 2020). The Ministry of Health is responsible for overseeing all SNS hospitals, whilst hospitals and clinics in the private sector have their own management structures (Simões et al., 2017). In the private sector primary care is provided through clinics for general and family medicine consultations or occupational medicine, whilst hospitals, clinics and laboratories account for secondary care (A. M. Nunes & Ferreira, 2019). In 2022, of the 243 hospitals in Portugal, 131 were registered as private (INE, 2024). Most of the 36,200 available beds were in public hospitals (24,000), less than half of the beds were provided by private institutions (11,700) (INE, 2024). In the last 20 years, Portugal's private healthcare sector has experienced significant growth, while the SNS has encountered difficulties with funding, efficiency, and capacity (OECD & European Observatory on Health

Systems and Policies, 2023b). As a result, healthcare professionals often work in both the public and private sectors, a phenomenon referred to as "dual practice." (Russo, 2018).

Following the modernisation of the health sector throughout the last 40 years, the mean life expectancy in Portugal increased significantly by ten years (from 72 to 82 years). Simultaneously, birthrates (1.4 children per woman in recent years) have shrunk and are exacerbating the imbalance between working-age citizens and retirees (OECD & European Observatory on Health Systems and Policies, 2023b). Consequently, the increasingly older population presents one of the biggest challenges for the Portuguese health system today (Tavares et al., 2023a). The National Health Plan of Portugal carried out between 2004 and 2010 addressed human resources as a focus for necessary reform and key area for healthcare system effectiveness (Barros et al., 2011). However, the global financial crisis of 2008 and the following emigration wave within and after this period have hindered the intended change (Buchan et al., 2013; Wray, 2013).

The global economic recession starting in 2008 had a substantial impact on Portugal, resulting in a financial and social crisis as the GDP decreased by 4.4% and unemployment rates increased (A. M. Nunes & Ferreira, 2019). Facing financial difficulties, the government signed the "Troika Memorandum" in 2011, which required immediate austerity measures in exchange for a loan but also paved the way for significant long-term economic recovery (Morais Nunes et al., 2019; Simões et al., 2017). In the agreement 34 economic and financial measures regarded the Portuguese health sector, resulting in several reforms aiming to improve cost efficiency in primary and hospital care (Simões et al., 2017). For example, plans on building new hospitals were cancelled, wages and the number of medical professionals were reduced, personnel admissions and progressions were blocked, and fees for using public health services were increased (Barros et al., 2011).

The measures proved financially effective in the short term, but in turn the overall access to public health decreased dramatically, particularly for the most vulnerable parts of society (A. M. Nunes & Ferreira, 2019). Until today, the main focus of health communication lies on prevention measurements, promoting healthier lifestyles, as opposed to reactive measurements like promoting careers in healthcare (OECD & European Observatory on Health Systems and Policies, 2023b). Furthermore, during the period of austerity, the already fast ageing process of the Portuguese population, due to decreasing birth rates, was accelerated by growing numbers of emigrating young people, known as the "fourth cycle of emigration" (C. Pereira & Azevedo, 2019, p. 4; Simões et al., 2017).

The emigration of qualified health personnel combined with – and to large extent due to – the budgetary cutbacks, posed a major challenge for the Portuguese healthcare system in sustaining the access to health services for Portuguese residents (Morais Nunes et al., 2019). Patients were dissatisfied with the decreased response rate of the SNS, as medical staff was increasingly demotivated because they lost rights and income (Correia et al., 2015). Between 2010 and 2013, Portuguese emigration experienced its highest growth rates since the 1960s (Pires, 2019). Notably, contrary to before, now a majority of 85% emigrated within Europe, which aligns with the contemporary Portuguese emigration flows (Pires, 2019). By the end of 2022, there were 25,153 doctors (17.4% more than in 2012), 49,254 nurses (31.4% more than in 2012), and 10,892 diagnostic and therapeutic technicians (30.9% more than in 2012) working in hospitals. (INE, 2024). Generalist nurses made up the majority (78.9%) of the nursing staff in hospitals in 2024 (INE, 2024).

As of October 2024, Portugal's government has introduced a groundbreaking plan offering a decade of tax breaks to young professionals, aiming to curb the exodus of highly educated youth (Jones, 2024). This initiative reflects the government's urgency in addressing high taxes, low wages, and steep housing costs, which are driving young talent away (Jopson & Aníbal, 2024). How and when these measures will come into effect remains unclear, however, it is expected to have a major impact on young Portuguese healthcare professionals regarding working abroad (Jones, 2024).

Despite the mentioned challenges, the Portuguese healthcare system remains cost-effective, with a per capita health expenditure one-third below the EU average and mortality rates 19% lower than the EU average (OECD & European Observatory on Health Systems and Policies, 2023b). However, issues with accessibility persist, as unmet medical needs in 2022 surpassed the EU average, reflecting ongoing staffing and management challenges (T. M. A. Neves et al., 2021; OECD & European Observatory on Health Systems and Policies, 2023b).

Germany

Germany consistently ranks higher in various global healthcare indices than Portugal (Blumenthal et al., 2024; Statista, 2023). However, both countries share several fundamental principles, such as providing universal, accessible healthcare to their citizens, with emphasis on primary and integrated specialist care, as well as high standards in patients' rights and privacy (Barros et al., 2011; Simon, 2021). Medical care ratios in both countries are relatively equal, e.g. with 3.33 doctors per 1,000 inhabitants in Portugal compared to 3.73 in Germany (OECD & European Observatory on Health Systems and Policies, 2023a, 2023b). In the last

two decades Portugal's average life expectancy has been increasing faster than the EU average, and it is also one year higher than in Germany. Although growing, Portugal's spending on healthcare per capita is still less than two thirds of the average EU-member's spendings (OECD & European Observatory on Health Systems and Policies, 2023b).

At the same time, Germany's health spending was the highest in the European Union (ca 60% higher per capita) and also the share of public funding exceeded the EU average by 9.8%, which is largely connected to Germany also having the highest number of hospital beds in the EU with 8.0 beds per 1000 population (OECD & European Observatory on Health Systems and Policies, 2023a). Portugal is 30% below EU average in terms of healthcare spending per capita and has a low, decreasing number of beds (3.4 beds per 1000 population) (OECD & European Observatory on Health Systems and Policies, 2023b).

During the Covid-19 pandemic in 2021, Germany and Portugal have successfully cooperated together when the German government sent more than twenty doctors and nurses, as well as medical equipment to support intensive care units (Reuters, 2021). Apart from this there has been no other collaboration in healthcare related issues. Following the Covid-19 pandemic, the member states of the European Union have commenced to develop a common strategy in the healthcare sector, mostly to combat cross-border health crises, prevent chronic diseases and ensure widespread cross-border healthcare (Böning, 2023). However, as healthcare remains a national responsibility, European involvement remains little and policies are to be regarded as supplementary (Böning, 2023).

In Germany, healthcare administration is shared between federal and state governments, which can create bureaucratic challenges in implementing reforms and inefficiencies in its use of resources (Frommann, 2014; Simon, 2021). Above all, this is displayed in the health expenditure in relation to GDP of Germany, which is the highest in the EU and two percent higher than EU average (OECD & European Observatory on Health Systems and Policies, 2023a). Although heavily funded, German hospitals have constantly faced financial difficulties in the last 20 years, with more than half having negative balanced year-end results (Blum et al., 2023). The percentage of hospitals (with more than 100 beds) which had a positive annual surplus, went down from 44% in 2021 to 35% in 2022 (Blum et al., 2023, p. 7). Nursing professionals account to about one third of all employees of the average German hospital, and have been increasing in number by 11% since 2013 (Blum et al., 2023). Comparatively, the other groups—physicians, medical assistants, and non-medical staff—have grown at faster rates (Blum et al., 2023). Compared to the general German economy, German hospitals employ a

lower proportion of migrant workers, more female employees, and is characterized by a high mean level of qualification with an above-average part-time ratio (Fuchs & Weyh, 2023a).

Like Portugal, Germany is confronted with an ageing population as well and is struggling to fill personnel gaps in every economic sector (Nagarajan & Sixsmith, 2023). A constant positive net-flow of immigrants, occasionally spiked by international crises such as the Ukraine war, has temporarily compensated for the decreasing birth rates in the last twenty years (Thränhardt, 2024). Although Germany has arguably profited economically from labour migration in the past, immigration has become a major social controversy and political debate (Gessler & Hunger, 2024; Schiller & Jonitz, 2023). These circumstances partially arose from the fact that the irregular migration flows of the last ten years have not been contributing to solving the shortage of labour sufficiently (Schlemmer, 2024). Hellwanger et al. (2023) from the Nuremberg Institute for Employment predict a 11.7% decline of potential labour supply in Germany by 2060, as the effects of a likely increasing immigration rate will be limited by the increase in emigration.

2.1 Hospitals and clinics: structural problems and reforms

As discussed above with focus on the macro-level, Portugal and Germany share a range of current structural problems and approaching future challenges regarding healthcare, arguably of which the demographic change being one of the most prominent ones. The transition to a shrinking, ageing population is causing labour shortages, whilst simultaneously increasing demand for treatments and services, effectively raising costs dramatically (Fuchs & Weyh, 2023a; Tavares et al., 2023b; Lopreite & Mauro, 2017). As part of the meso-level, organisations in the healthcare sector are facing a diverse range of challenges in the present and in the future, which are made visible by the circumstances of individual groups of healthcare professionals (micro-level).

Fuchs and Weyh (2023a) state the hospital sector will be particularly impacted by the demographic change, underlining the importance of hospitals implementing strategies for recruiting and retaining personnel. Furthermore, in the long-term, attractiveness of the German labour market is based on effective government participation, as shown by other countries in Europe and worldwide, which will increasingly compete for talent (Attree et al., 2011; Privara, 2022; Walton-Roberts, 2022). Portugal and Germany have a positive net migration, consisting to large extends out of non-EU migrants, due to a political orientation based on comparatively immigration friendly policies (Destatis, 2024b). However, uncontrolled migration remains a

highly controversial topic in society and politics. The controversy around the topic immigration is not beneficial to the development of labour migration programs (Guzi et al., 2023). The German government planned to introduce tax benefits for skilled professionals from other countries, as already set into place by the UK, France or Portugal for example, however, these plans have been cancelled after analyses revealed no expected positive effects (Kaufmann, 2024; Siegel, 2024). In any case, the roots of the problems in both health sectors are reaching further than personnel management.

Since the creation of the SNS, the Portuguese healthcare sector has increased dramatically over the past 40 years and today is generally seen as the main contributor to the health status of the Portuguese people having progressed to one of the best in Europe (Fronteira et al., 2020; OECD & European Observatory on Health Systems and Policies, 2023b). However, the Covid-19 pandemic has shown severe shortcomings in the stationary capabilities of the Portuguese health capabilities, namely specialised facilities and medical staff (Brito Fernandes et al., 2021). The number of doctors and nurses in Portugal have increased in the initial year of the pandemic compared to the previous year, with 3.2% more doctors and 2,9% more nurses overall (INE, 2024).

Although today the number of professionally active nurses in Portugal has risen by over 15% in the past five years, the nurse density in 2021 had remained 13% below the EU average, with 7.4 nurses per 1,000 people (OECD & European Observatory on Health Systems and Policies, 2023a). The problem is partially rooted in the low numbers of medicine and nursing graduates in Portugal, which are still below the EU average (OECD & European Observatory on Health Systems and Policies, 2023a). Additionally, the numbers of personnel leaving the profession because of dissatisfaction, as well as personnel emigrating abroad, have been rising again in the recent years (Marques-Pinto et al., 2018; OECD & European Commission, 2024). To address the outflow of domestically trained nurses, the Portuguese government in 2022 reinstated the salary progression scheme for nurses and initiated tenders to fill approximately 1,900 positions for specialist nurses and nurse managers, roles that had remained frozen since 2010 (OECD & European Observatory on Health Systems and Policies, 2023a).

The Portuguese Nursing Order and other Portuguese nursing officials have been criticising the unchanged situation in Portuguese hospitals, where workload and expectations of nursing staff have increased, yet salaries and career opportunities have remained the same albeit rising costs of living and monetary inflation. A broad study by Marques-Pinto et al. (2018) on nurses' intention to leave Portuguese hospitals suggests that the inclusion of nurses in decision-making processes about professional practice policy and work environment issues, as well as improving

the well-being of nurses are two strategies to reduce intentions to leave. Other recent studies support this view, highlighting the need of promoting sustainable nurse staffing through adequate healthcare management policies in Portugal (Neves et al., 2021).

Similarly, healthcare officials in Germany have been continuously pushing for higher salaries, reduced workloads, and more recognition in the last decades, however awareness and support in the general society regarding poor work environments in nursing began to soar during the pandemic (Moosburger, 2023; Rappold, 2024). Here, the Covid-19 crisis also highlighted the critical financial imbalance in the majority of German hospitals, enhancing public attention to policies in Germany's healthcare sector (Klauber et al., 2023, p. V). In 2023 and in the beginning of 2024, hospital management, doctors and caretakers throughout different parts of Germany went on strikes to warn about the increasing risk for large-scale insolvencies of hospitals and their demand for fair salaries and better working conditions (Knight, 2023; Stroud, 2024).

For insiders of healthcare management in Germany the deteriorative situation Germany's healthcare infrastructure comes down to three major problem areas: economic inefficiency, lack of digitalization, and lack of personnel (Fuchs & Weyh, 2023b; Klauber et al., 2023). German hospitals in particular are under increasing pressure, not only struggling financially with inflation and higher maintenance costs, but also with excessive bureaucracy, as well as severe personnel shortages (Blum et al., 2023). Paradoxically, state expenditure on healthcare in Germany has doubled since 2006 (Destatis, 2024a).

In confrontation with the mentioned mismatch of cost and efficiency, the Ministry of Health of Germany (Bundesministerium für Gesundheit, BMG) introduced a major hospital reform in January 2023, which was passed in October 2024 (BMG, 2024). The "Hospital Care Improvement Act" aims to combat staff shortages and ease capacity constraints by expanding hospital day treatment and reducing the amount of facilities (BMG, 2024). Since January 2023 hospitals have been asked to convert all previous fully inpatient treatments into day treatments, where clinically suitable, to alleviate staff constraints (BMG, 2024). Furthermore, the hospital reform sets out to increase medical specialization and to become more efficient, in order to be more patient-centred, and economically stable (BMG, 2024).

The shift towards more ambulant treatments and specialisation is aiming to reduce cost and relieve work-load pressure from hospital staff (Klauber et al., 2023). However, according to the Federal Statistical Office of Germany (Destatis), demand for nursing staff is expected to increase by 2.15 million in 2049, a third more compared to 2019 (Destatis, 2024b).

Furthermore, the nursing staff forecast for 2049 is expecting a lack of between 280,000 and 690,000 nursing staff to meet the expected demand (Destatis, 2024).

Increasing healthcare worker salaries is a publicly supported measure to address the nursing labour shortage (Theobald, 2022), however, research remains uncertain about the impact of nurses' wages on the labour supply (Andreassen et al., 2017; Kroczeck & Späth, 2022). According to a study by Kroczeck and Späth (2022), the perceived attractiveness of care jobs by nurses in Germany is mostly influenced through “soft” factors such as team-atmosphere and time for patients. Furthermore, the results suggest perceived compensation for unpleasant working conditions would need wage increases of between 20% to 47%. Therefore, if employers are not willing or able to substantially increase wages, they must provide improvement in other relevant job characteristics (Kroczeck & Späth, 2022).

2.2 Nursing in Portugal and Germany

Making up the largest professional group within health systems, the lack of nurses is a highly relevant issue for health systems and societies as a whole (Buchan & Aiken, 2008; Neves et al., 2022). The WHO (2020) estimates a global shortage of 5.7 million nurses by 2030, highly recommending countries to increase education capacities and retention measurements. According to the 2024 OECD Health Report, nearly 25% of nurses and 50% of personal caregivers across EU countries report financial difficulties (OECD, 2024). In numerical terms, the average entry to mid-level monthly salary in Portugal is significantly lower (<2,000€) than in Germany (<4000€).

Nursing is the profession of providing autonomous and collaborative care for individuals and communities in all settings throughout the life cycle (Santy-Tomlinson et al., 2018). According to the definition by the International Council of Nurses (ICN), the field of nursing encompasses the promotion of health and the prevention of illness, with key nursing roles being education, in patient and health systems management (ICN, 2002). A nurse is defined as “a person who has completed a program of basic, generalized nursing education and is authorized by the appropriate regulatory authority to practice nursing in his/her country. Nurses cover a complex, demanding and labour-intensive area in healthcare.” (ICN, 2002). Therefore theoretical nursing expertise as well as practice must be grounded in a strong scientific foundation and regularly updated (Cannon & Boswell, 2014). Attending education and training for several years before becoming a professional makes nurses a highly-skilled workforce which is fundamental to effective healthcare (Hall & Ritchie, 2013).

A vast amount of research acknowledges the worldwide shortage of nurses, aggravated by various interconnected factors, such as the mentioned sociodemographic and recent epidemiological changes, increased needs in healthcare, and worsened working conditions (Buchan, Duffield, et al., 2015; Both-Nwabuwe et al., 2018; Yatsu & Saeki, 2022). A major push factor for nurses intending to leave their job is burnout due to emotional exhaustion and depersonalisation (Sasso et al., 2019; Jiang et al., 2017; Heinen et al., 2013).

Additionally, in Portugal, nurses face challenging contract conditions, which are often characterized by temporary, precarious contracts that lack stability and career progression. Many nurses in the public sector are employed on short-term contracts, which are frequently renewed instead of being converted to permanent positions. This instability impacts their ability to plan for the future, and access to benefits typically associated with long-term employment, such as career development and vocational training (Orgambidez & Almeida, 2020). The results of the study by Neves et al. (2022) show that nurses who have more precarious, short term contracts have higher intentions to leave the profession. Several nursing organisations have voiced concerns over these conditions through strikes and protests, demanding permanent contracts, career recognition, and equal opportunities regardless of contract type (Shabi, 2024). Recent government proposals, including a modest pay raise, have been deemed inadequate by unions, as they do not fully address the core issues of contract stability, as well as overdue payments and vacation days from prior years (The Portugal Daily, 2024).

For many nurses in Portugal it is quite common to work both in private and public sector (“dual practice”), as it allows nurses to supplement their income due to relatively low wages and limited career growth within the public sector (Russo et al., 2018). Often holding primary employment in the public sector, where they work full-time, nurses in Portugal take additional shifts or part-time roles in private hospitals or clinics . This arrangement, while financially necessary for many, can create challenges related to job satisfaction and burnout, as managing multiple roles often leads to extended hours and less rest (McPake et al., 2016).

Consequently, this trend has sparked discussions around the impact on healthcare quality, as nurses balancing multiple jobs may face fatigue, which could affect patient care. Additionally, the public sector may experience further strain. In fact, researchers note that while dual practice can benefit nurses economically, it may require policy adjustments to ensure that both sectors maintain high standards of care without overstressing the nursing workforce (Biscaia & Heleno, 2020; Fronteira et al., 2020). Additionally, as the amount of nurses in Portugal is already below EU average, the pressure on retaining Portuguese-educated and domestically employed nurses is high (Neves et al., 2021).

A general measure of nursing personnel availability is the ratio of nurses to the population. (Buchan et al., 2013). Despite a 15% increase of practising nurses in Portugal since 2018, the density of nurses in Portugal is still 13%, and below EU average (OECD & European Observatory on Health Systems and Policies, 2023b). There is a higher concentration of nurses in the northern regions of Portugal and the Lisbon area, compared to the south and the inland (OECD & European Observatory on Health Systems and Policies, 2023b). The number of nursing graduates is still 30% below EU averages, largely due to the mentioned stressful working conditions, low pay, and limited career growth prospects, which impacts the attractiveness of becoming a nurse in Portugal amongst young people (Leone et al., 2015; OECD & European Observatory on Health Systems and Policies, 2023b).

Basic nursing education is an officially accredited study programme designed to teach comprehensive and solid fundamentals of behavioural, life, and medical nursing sciences. It prepares individuals for general nursing practice, equips them for leadership roles, and provides the foundation for further specialised or advanced nursing education (ICN, 2002). Following the EU Bologna reforms in 1999, the establishment of bachelor's and master's degrees in nursing has allowed EU-wide comparison of nursing degrees, levelling education standards (although differences between countries remain) and enabling easier official acceptance internationally. Since then, nurses trained in Portugal must undergo a four-year basic education programme that grants a degree corresponding to the first cycle of the Bologna Licence-Masters-Doctorate structure (Fronteira et al., 2020).

This transition from the traditional nursing course at a technical institute or university of applied sciences to a universal undergraduate degree has enabled direct access to master's or doctorate programs without the need for a degree in another field, as was previously required (Fronteira et al., 2020; Simões et al., 2017). The corresponding introduction of the European Credit Transfer and Accumulation System (ECTS) allows transparent calculation of the overall amount of work produced by the students, strengthens the bond between institutions, and expands the students' academic and professional options (Zabalegui et al., 2006). After the latest of several reforms of nursing career legislation in 2019, currently nursing career is structured in the three different categories general care nurse, specialist nurse, and nurse manager (Cordeiro & Carvalho, 2022).

Whilst in Germany entry level nursing education is based on either vocational training programmes or academic education at universities of applied sciences, entering nursing education in Portugal is academic only and fully integrated into the higher education system (Cordeiro & Carvalho, 2022; Kolling, 2023). However, like in Germany, Portuguese nursing

students attend polytechnic institutes to learn specific nursing skills (Cordeiro & Carvalho, 2022). Currently there are 28 higher education institutions in Portugal offering nursing degrees (DGEEC, 2023). The bachelor's degree in nursing is divided into eight semesters and is predicated on a rotation of academic, theoretical-practical, and clinical teaching curricular units (S. S. C. Santos et al., 2014). Each academic semester has 30 ECTS points, a course of four years accordingly 240 ECTS in total (S. S. C. Santos et al., 2014). The majority share of ECTS points is formed by compulsory courses related to scientific nursing, however there are points considered for optional disciplines from the areas of Foreign Language and Literature, Computer Science, Statistics, Business Sciences and Arts (S. S. C. Santos et al., 2014). The optional subsequential Master's degree allows specialisation and qualifies for higher roles on the hospital job market, such as management positions (Cordeiro & Carvalho, 2022). As of September 2022, there were 79 master's degree programs in specialized areas of nursing, such as Community Nursing, Rehabilitation Nursing, and others. By September 2023, this number had increased to 89 courses, highlighting the ongoing developments towards further expansion of the nursing education (L. Nunes, 2023).

These programs are accredited by the OE, but accreditation does not guarantee they will be offered every year, as this depends on adequate student enrolment. The structure of these programs typically involves a combination of theoretical and clinical education, ensuring that students gain both academic knowledge and practical experience in their chosen specialty (S. S. C. Santos et al., 2014). The completion of a master's program is necessary for obtaining a professional title as a specialist nurse, which is regulated by the OE (L. Nunes, 2023). The master's program generally includes a significant number of ECTS credits and often requires the completion of a thesis or a final project, contributing to the development of research skills in the field of nursing (L. Nunes, 2023).

Results of recent studies on nurse staffing in Portuguese hospitals highlight the shortage of nurses and stress the need for strategic intervention in human resource management (Neves et al., 2021; A. M. Nunes & Ferreira, 2019). Importantly, not only the number of available professionals is crucial to the quality of care, but also their appropriate skill sets and competencies (Neves et al., 2021). Vandresen et al. (2023) found that nurses involved in hospital management in Portugal face insufficient structural support and a lack of continuous training to better administrate the limited human resources in hospitals.

In a scoping review, Yatsu and Saeki (2022) identified the global shortage of nursing personnel and diversification of study abroad programs as two of six major topics of global trends in nursing. Skill shortages, cost effective measurements of using these skills,

introduction of new technologies and services, as well as reforms and changing regulations may be recognized as drivers for the professional development of nurses (Buchan et al., 2013; Delamaire & Lafortune, 2010). In their qualitative study of 109 first-year nursing students in Portugal, Henriques et al. (2022) found main motivations for becoming a nurse to be governed by ethical values marked by altruism: the ability of taking care of others, the satisfaction of helping, and associating with a high sense of mission.

There is a plausible coherence with the demand for more professional responsibilities for nurses, as research shows professional development, specifically specialisation, has positive effects on nurses' mental health (Seabra et al., 2019). A study on Portuguese nurse's predispositions to leave the nursing profession states nurses under 40 years working in the public sector are more willing to leave (Poeira et al., 2019). The authors conclude, higher satisfaction with the profession, along with increased professional autonomy and recognition, decreases the likelihood that nurses will switch to another career.

In comparison, Germany had a bachelor's degree program for nurses introduced in 2017 alongside the continuation of existing vocational training (OECD & European Observatory on Health Systems and Policies, 2023a). Additionally, the three vocational nursing tracks (general nursing, pediatric nursing, and geriatric nursing) were consolidated into a standardized two-year program with specialization options, making it easier for nurses to transition between different care sectors (Kolling, 2023). Innovations in the ambulatory care sector, particularly in rural areas and for elderly care, are now emphasizing the training of nurses and medical assistants to assume new responsibilities, such as conducting home visits, to better support general practitioners (Theobald, 2022).

The profession of Physician Assistant (PA) is a specialisation for nurses or other studied health workers aiming to close the gap between medical assistants and doctors and combat personnel shortages (Wessels & Geuen, 2021). PAs take on medical tasks that doctors delegate to them (Hooker et al., 2007), offering more flexibility in patient care and hospital management (Malone, 2022). The role of PAs is fully recognised today by hospital managers and medical units as part of modern healthcare in Germany, where PA graduates have since shown positive results in integrating their skills into the grid (Marschall & Hoffmann, 2019). Contrary to initial concerns the implementation of PA's has not interfered with hospitals efficiency, but instead it has proven to be beneficiary to both the Pas' and the medical practitioners' job satisfaction (Meyer-Treschan et al., 2023).

Albeit these arguments would allow considerations over being introduced, the PA role is not recognised in Portugal (L. Nunes, 2023). Although this might change in the future, a role

for Portuguese nurses to gain more responsibility and career options as of now is the one of nurse manager. The OECD has suggested the introduction or strengthening of the nurse manager role as a strategic measurement against nurse shortage in OECD countries back in 2005 (Simoens et al., 2005). Today several nurse management master programmes exist in Portugal and Germany which impart knowledge to take on administrative roles within healthcare management (Jeffries, 2022). The number of recognised programmes within the EU is steadily increasing as well as the demand for the specialisation on the labour market (Kukkonen et al., 2023). In their scoping review, Teixeira et al. (2024) suggest that future Portuguese nurse managers must be equipped with multicultural competency skills to be an effective communicator and leader – which leads back to studying and working abroad, which would allow to gain such skills.

2.3 Labour migration amongst healthcare professionals

The free movement of labour is a fundamental aspect of the European Union's single market, known as one of the "four freedoms" (Enchelmaier, 2004). However, while economically vibrant areas witness notable influxes of skilled and semi-skilled workers, peripheral regions often grapple with the opposite scenario, leading to significant regional inequalities and serving as a key driver behind many of Europe's socio-political challenges (Dijkstra, 2014). According to the World Health Organisation (WHO; 2023), the global migration of health workers has increased significantly since the beginning of the century, and with an increasingly more countries involved, the migration pattern is growing in complexity. The Covid-19 pandemic has been a recent addition to the severity of the current situation, simultaneously affecting both the origin and destination countries, drawing more attention towards the role of migration in health resources (Botezat et al., 2024, p. 14).

By 2030 the WHO (2024) estimates up to 10 million health workers missing worldwide. Evidently, there is a strong correlation between gross domestic product per capita, employment opportunities and migration patterns (Dijkstra, 2014; McGrath, 2021). Usually, nurses migrate from developing to industrialised countries, where salaries and living standards are higher (Kingma, 2007; Roth et al., 2021). They often leave behind critical gaps in the origin countries' healthcare landscape, triggering an ethical debate about policies regarding active international recruitment (Kontos & Ruokonen-Engler, 2022; Botezat et al., 2024). In addition, origin countries tend to compensate for emigrating health workforce by recruiting personnel from third countries, typically similarly or more dependent on their workforce (Yeates, 2010). As an

example of a macro level issue, an organisation's strategic communication efforts must take this problem into account within the strategy development and stakeholder management (Holtzhausen et al., 2021).

The WHO (2010) has published guidelines for ethical recruitment of healthcare personnel worldwide, called the WHO Global Code of Practice on the International Recruitment of Health workers. The code sets out to serve all member states and stakeholders as a reference in subjects related to the global recruitment of health workers, designed by member states to serve as a framework for dialogue and cooperation. Within the voluntary principles promoted by the WHO, active recruitment of health personnel from developing countries facing critical workforce shortages are discouraged.

Another ethical guideline is emphasizing equal treatment of domestic and migrant health workers, including offering equal opportunities for professional development (WHO, 2010). Specifically, every healthcare professional should be given the chance to evaluate the advantages and disadvantages of various job positions. The WHO Code of Practice encourages the collaboration and partnership between source and destination country, so that both sides are able to benefit from the international migration of health workers. More specifically, the code suggests "member states should facilitate circular migration of health personnel, so that skills and knowledge can be achieved to the benefit of both source and destination countries" (Article 3.8).

The nonbinding code has been criticized to have had no or little positive effect on international health worker flows (Tam et al., 2016). Hence, in response to the continuously rising numbers, the WHO produced the dynamic "Health Workforce Support and Safeguard List", which consistently catalogues countries by density of health workforce and coverage of essential health services. Currently 55 countries (as of 2023) are listed as to be prioritized for health workforce support by the international community, which aims to discourage active recruitment by other countries (Cometto et al., 2023). Although Portugal has shifted from being a receiving to a source country since the early 2000's (Ribeiro et al., 2014), According to the WHO, Portugal is currently not at risk to be listed as a vulnerable country, as density of health workers and quality of services remain according to EU standards and keep improving, although they are still below EU average (OECD & European Observatory on Health Systems and Policies, 2023b). Nevertheless, the emigration of healthcare professionals in Portugal has been increasing recently (Neves et al., 2022), turning the loss of essential workforce members, such as nurses, into a significant political debate which increases the likelihood of government intervention on foreign recruitment (Cabral, 2023).

Based on the mentioned guidelines and in the light of the socio-political significance, the German government has created the “Triple-Win” programme (first introduced in 2013 and still ongoing), which is focused on beneficial collaboration between the three key stakeholders: the sending country, receiving country, and the individual migrant (Deutsche Agentur für Internationale Zusammenarbeit, 2024). The receiving country addresses personnel shortages whilst providing education and professional opportunity for the individual health worker (Pütz et al., 2019). In the short term the sending country benefits from remittances, in the long term a return to the origin country means skill transfers and savings in education costs (Angenendt et al., 2023). Certainly, the applicability and the specific measures depend on the sending country and the individual and can fail when migrants decide to stay (Money, 2024). However, the concept of the “Triple Win” represents a legitimate effort to turn a “brain-drain” into a “brain-gain” and should be regarded in sustainable recruitment efforts. In general, circular migration approaches have been discussed widely in the last decades, making it a whole topic itself. A majority of healthcare related studies conclude that the individual needs of the migrants must be understood for policies to be successful (Setijaningrum et al., 2023; Zapata et al., 2023).

The negative effects of global brain-drain in healthcare have been thoroughly analysed, however research on understanding nurse migration on the different societal levels may have the potential to predict and manage shortages in lesser developed origin countries under controlled circumstances, ultimately improving healthcare delivery in both countries (C. Pereira, 2019; Walton-Roberts, 2022). Dywili et al. (2013) linked motivators for nurse migration to financial, professional, political, social, and individual factors. Although economic factors were the most frequently reported in their study, the other factors are equally relevant, especially for nurses migrating between developing countries (Dywili et al., 2013).

The findings of a study by Lauxen et al. (2019), where foreign nurses practising in Germany were interviewed, indicate that potential and importance of foreign recruitment has increased in the German hospital sector. However, in many specific fields the potential to secure skilled workforce remains low, partially because there is no data basis reflecting the interests of internationally qualified personnel (Lauxen et al., 2019). Hence, the authors suggest to systematically monitor in what way, for how long, and under which circumstances foreign trained health workers want to work in Germany. The German healthcare market is generally criticised for not having a consistent long-term strategy for recruiting international nursing professionals (Gümrükcü et al., 2024; Hradecky & Sander, 2024).

The National Health System of the United Kingdom was one of the first European countries to react to the increasing scarcity of nurses and identified four areas of intervention: broadening domestic recruitment by attracting more applicants to nurse education; encourage registered nurses to return; improve retention levels with more career perspectives and better working conditions; recruiting nurses from abroad (Buchan, 2007; Buchan & Aiken, 2008; Kline, 2003). Studies have shown that British hospitals and recruitment agencies played a central role in the decision-making of Portuguese nursing students considering migrating (meso level) (C. Pereira, 2019; Ribeiro et al., 2014). The combination of offering detailed information about working in Britain and concrete employment offers, had direct impact on the decision-making process of Portuguese nurses and nursing students (C. Pereira, 2019).

In a 2019 study about the beliefs, motivations, and expectations of Spanish nurses planning to migrate, job uncertainty and professional development were identified as the main push-factors for leaving their origin country (Gea-Caballero et al., 2019). These reasons are shared to a large extent with Portuguese nurses, especially for young nursing graduates and nursing students (C. Pereira, 2019). According to Claudia Pereira (2019), to migrate is always an individual, micro-level decision. For the majority of Portuguese nurses during the last big labour migration wave, the choice was heavily influenced by economic austerity (macro level), resulting in a perceived lack of professional perspectives (micro-level) (C. Pereira, 2019). De Vries et al. (2023) found alternating effects between micro and meso level, stating the primary factors influencing job retention amongst nurses in Europe were job satisfaction, career growth, and work-life balance.

2.4 Workplace integration of internationally qualified nurses in German hospitals

Integrating foreign national employees into a domestically operating organisation poses various challenges for all stakeholders (Akin et al., 2007). In healthcare the main challenges are language barriers, cultural differences, unrecognized qualifications, legal hurdles, lack of social networks, differences in workplace practices, insufficient support services, and discrimination (Zimmermann, 2009). Migrant nurses continue to face discrimination, limited career opportunities, and various bureaucratic hurdles in the migration process – necessitating their inclusion in research to inform better policies (Smith et al., 2022; Theobald, 2022). Structured integration programs with language support, country-specific bridging, and help with organisational challenges can improve their experiences (Roth et al., 2023). Furthermore, in their study about workplace integration of internationally qualified nurses (IQNs), Roth et al. (2023) identified several barriers and enabling factors, suggesting solving the complex

challenge of integration by recognising both the experience of IQN, as well as the perception of the German nurses working with them.

As a central finding of a large-scale research project by Pütz et al. (2019) on the integration of foreign healthcare personnel in Germany was the identification of the issue regarding the recognition or non-recognition of expertise and professional experience. Kontos and Ruokonen-Englers (2022), two of the scholars involved in the study by Pütz et al. (2019), refer to these interviews in their working paper on migration sociology, advocating an interlinking of migration research and the sociology of work (Kontos & Ruokonen-Engler, 2022). On the basis of their findings, they criticize a fragmentation between the health workers trained in Germany and the internationally trained ones (Kontos & Ruokonen-Engler, 2022). They argue, the global power imbalance and the structural inequalities it generates, result in tensions, misunderstandings and conflicts, which ultimately surface in the interactive dynamics of everyday work life, taking the form of culturalization and racialization (Kontos & Ruokonen-Engler, 2022). However, the study focuses only on the federal state of Hesse, as the region of Frankfurt was the first to launch a coordinated initiative in 2012 to secure skilled labour in the healthcare and nursing sector by recruiting nursing professionals from abroad. This not only highlights the structural differences among the 16 different federal states in Germany, but it also serves as an example for the lagging awareness process on the subject in Germany when compared to other European countries. In contrast, recruiting and integrating IQNs in the UK came into effect in the early 2000's (Buchan, 2007).

Furthermore, other than medical practitioners, nurses in particular face more difficulties in the process of getting their qualifications recognized by European authorities (Dussault et al., 2016). Hence, nurses are statistically more likely to work below their qualifications, effectively hindering work satisfaction, retention and ultimately successful integration in the job market (Dussault et al., 2016; Roth et al., 2021). Underutilization of foreign trained health workers remains a major challenge, as the bureaucratic effort to confirm credentials of education, training and experience is time intensive and often only commences after the arrival of the migrants (Walton-Roberts, 2022).

However, the EU member states established mutual recognition of higher education diplomas in 2005, as a result enabling more migration within the EU (Galbany-Estragués & Nelson, 2016). Bureaucracy remains an obstacle, especially in Germany, but in the last decade German policymakers have increasingly opted to streamline the process and published guidelines for successful foreign-recruitment and integration, as well as forming bilateral agreements with countries such as Bosnia-Herzegovina, Serbia, and the Philippines in 2022

(Pütz et al., 2019; Theobald, 2022). Nonetheless, work immigration from an EU member state remains less complicated and faster than from a third-party country (Theobald, 2022). The training of nurses responsible for general care in Portugal is also regulated at the European level to facilitate the recognition of their professional qualifications across Member States (Cordeiro & Carvalho, 2022).

The comparison study of nurse workforce policies in Australia, the United Kingdom, the USA, and Portugal by Buchan et al. (2015), states there is potential for increased productivity through the implementation of advanced nursing roles in all four countries. Despite the many differences between those countries, they share the same problems regarding the nurse workforce: shortages, maldistribution, increased healthcare costs through ageing populations and higher expectations resulting in increased demand for services and turnover and emigration rates (Buchan et al., 2015). The data reveals a poorly developed policy framework in Portugal, due to the absence of coordinated workforce planning and opposition from the Medical Council, limiting the scope for nursing skills utilization. The 2015 study stated productivity and nurse retention would be improved in all four countries if advanced nursing career paths were provided.

A more recent study by Maré et al. (2019), regarding specifically the employee ageing problematic, is suggesting possibilities of lifelong learning for nurses through the integration of mobile and technological innovations as a sustainable approach. The overall notion of shifting focus towards continuous education and the promotion of professional development for nurses is supported in a range of recent studies (Hakvoort et al., 2022; Tamata & Mohammadnezhad, 2023). In their 2022 scoping review Hakvoort et al. concluded: “All nurses pursue a continuation of professional development, but they have different goals, use different strategies and therefore have different needs” (p. 6). This indicates that employing organisations with a flexible EVP, fitting the nurses’ respective career goals and professional ambitions will have a competitive advantage in recruitment.

2.5 Future professional prospects of nurses

Nurses have to cover a wide field of knowledge which is constantly evolving (Levett-Jones, 2005). In order to keep up with the development of medical knowledge as well as contemporary practicing guidelines, nurses and nursing students should continuously seek to acquire and enhance their professional knowledge and skills, both during their education and throughout their careers (Dagne & Beshah, 2021; Levett-Jones, 2005). All efforts in education, particularly

throughout the professional career, are highly dependent on individual motivation and self-determination (Loera et al., 2013). Academic motivation plays a key role in nurses to absorb extensive knowledge, acquire new skills, and commit to continuous learning (De Paula et al., 2021a; Zhang et al., 2015). Therefore, in the context of shortages of qualified personnel in hospitals and the growing dissatisfaction amongst nurses, academic motivation has become a crucial factor.

Buchan et al. (2013) advocate for Portuguese nurses in advanced roles. The authors suggest training and promoting nurses will improve the overall efficiency and delivery of the healthcare system, specifically in combating personnel shortages, increasing recruitment efforts outside the domestic labour market, and making nursing more sustainable, affordable, plannable, ethical. A study conducted in the United States of America by Holle (2021) revealed that nurse development programs may reduce nurse turnover by as much as 11%, whilst benefitting overall nurse satisfaction. According to the author, in practice, hospitals may start to increase recruitment and retention of nurses by becoming knowledgeable about the use of orientation programs. Aligning with the earlier mentioned findings from the studies by Fréchette et al. (2013) and Heilmann et al. (2022), together with the findings on employer branding, can guide hospitals in tailoring recruitment and marketing to meet the expectations of young nurses by focusing on the principles of continued professional development (CPD).

Positive effects of leaving the home country are shown in a study conducted by Pereira et al. (2017), which evaluates the learning outcomes of international exchange programs for nursing students from the United States and Portugal. The results strongly support the beneficial impacts of international exchange in nursing. The authors recommend nursing students to participate and gain international experience, in order to develop personal growth and professional competencies that may impact future practice. In their study on cultural diversity among patients and healthcare workers in Portugal, Teixeira et al. (2022) advocate for capable nurse managers in leadership positions to sustain in a globalised environment. In accordance with comparable international studies, the results of the study highlight the importance of cultural diversity in nursing teams, as well as practical benefits of having international work experience (Hvalič-Touzery et al., 2017; Sonnenschein et al., 2017).

Furthermore regarding the individual professional development of nurses, a scoping review study by Collard et al. (2020) states that gaining work experience abroad is enhancing resilience-building, emotional and physical coping skills, confidence, career guidance, authentic mentorship, and organisational support – which is essential in becoming a highly qualified practitioner. However, there are differences between more experienced nurses and

young nurses with less experience. According to a study by Hakvoort et al. (2022), recently graduated nurses prioritise becoming an accepted member of the team during the process of continued professional development (CPD). Whilst experienced nurses struggle more with structural problems and the unavailability of CPD, graduates are more likely to experience barriers in CPD through workplace incivility during their career development (Hakvoort et al., 2022).

Career development, which is defined as the process of making career-related decisions, is largely driven by the confidence in one's professional abilities, also known as self-efficacy (Creed et al., 2007). Self-efficacy plays a role in reducing anxiety, improving learning quality, creativity, academic happiness, and the training of qualified nurses in addition to obtaining academic success (Zhang et al., 2015). Academic performance is highly dependent on students' motivation, which can be scientifically expressed in and measured as academic motivation (Vallerand et al., 1992). Following the self-determination theory, the concept of academic motivation among nursing students is vast and multifaceted, influenced by a range of personal, family, social, educational, and occupational aspects (Rafii et al., 2019). De Paula et al. (2021a) successfully demonstrated the significance of the academic motivation scale in connection with Portuguese nursing students. The study found that nursing education in Portugal should enhance teaching strategies focused on identifying ways to strengthen and innovate higher education in nursing.

The academic motivation scale (AMS) is based on the self-determination theory and is originally composed out of 28 question items, which are subdivided into seven subscales assessing three types of intrinsic motivation (IM), three types of extrinsic motivation (EM) and amotivation (AM). Intrinsic motivation stands for the pleasure and satisfaction of doing an activity for the sake of participation. Psychological research states that intrinsic motivation arises from the fundamental psychological needs of competence and self-determination (Vallerand, 2000). Intrinsic motivation in the AMS is characterised by students' motivation to know, to accomplish new things, and to experience cognitive stimulation, which translates to the subscales: "to know"; "toward accomplishment"; "to experience stimulation" (Vallerand et al., 1992).

Extrinsic motivation in Vallerand's et al. (1992) AMS refers to engaging in academic activities due to external pressures or rewards rather than inherent interest. This form of motivation is driven by factors such as grades, approval from others, or avoiding negative consequences. In the AMS, like IM, EM is categorized into three subtypes; including external regulation, introjection, and identification, each reflecting varying degrees of self-determined

behaviour (Vallerand et al., 1992). Amotivation does not have a subscale. The seven different subscales each have two respective items in the questionnaire and enable a more precise understanding of intrinsic and extrinsic motivation.

Prevalent studies in this field have investigated research questions surrounding nurse turnover rates, nurses' intention to leave, organisational commitment amongst nurses, and others. Several study designs applied scientific scales specifically designed for nursing personnel, such as the "nurse satisfaction scale" (see Chang et al., 2018), the "Practice Environment Scale of the Nursing Work Index" (see Neves, 2020), the "Attitude scale for Brain Drain amongst nurses" by Öncü et al. (2018), or the "Academic Motivation scale for nurses" (see De Paula et al., 2021; Rafii et al., 2019; Van Nguyen et al., 2023). Non-specified scales originating from HR and organisational psychology research, such as the "Organisational Commitment scale" by Meyer and Allen (2001), or the "Intention to Leave Scale" by Weisberg (1994) were also used in the nursing context (see Neves, 2020; Neves et al., 2018).

Additionally to scholars, Portuguese nursing representatives have repeatedly called for an expansion of the scope of practice for nurses, allowing them to take on more responsibilities, such as handling prescriptions or supporting doctors in peri-operative tasks (. For this matter Temido and Dussault (2015) propose the adaption of a general framework tailored to the Portuguese situation, tackling the unequal mix of too many doctors and too little nurses in numbers, but also in terms of influence and responsibilities in practice. Learning from practice in the United Kingdom, the authors argue Portuguese policymakers must carefully consider the issues of creating national education standards, approving newly created educational programmes, and certifying and recertifying professional abilities (Temido & Dussault, 2015).

Despite lack of perceived change in their own careers, studies have found that Portuguese nurses who took part in professional development programs consider them to have increased productivity and improved their competence in delivering care in their area of specialization (Neves et al., 2021; Fronteira et al., 2020; Silva et al., 2018)

In regard to the current difficulty of providing adequate nursing care to the Portuguese population expansion of the scope of practice may seem to come too early for Portugal, however, nurses with enhanced skillsets will add value to the vision and provision of nursing care (Gray, 2016; J. Santos, 2023). Furthermore, as seen in the USA, UK, and Germany, the process of establishing and effectively integrating more nurse positions takes time. In any case, such measurements should be implemented in combination with the other three areas of intervention mentioned before.

According to a study by Warshawsky et al. (2020) new nurse managers must be supported by their organisation by undergoing a supportive transition program. Such a “transition-to-practice” program was developed with evidence-based results from a study by Lawson (2020) which showed significant improvement in leadership competencies. Implementation in Portugal would be challenging, as there are no existent structures yet. However, in the light of the mentioned future and current challenges for the healthcare system, the professional development of Portuguese nurses is advised to be supported.

In the particular case of Portugal, the labour migration flows of nurses must be taken into account. Completely normalized in the global economies other sectors, global talent management is becoming increasingly important for staffing in healthcare organisations. Portuguese healthcare providers, including hospitals and clinics, must be aware of the international competition for talent in healthcare. Nowadays an origin country, Portugal faces a “Care-Drain” and needs to address this by implementing change. As a member of the EU, citizens will always be allowed to move freely in between member states. Therefore, based on the aforementioned findings, addressing nursing personnel shortages, the Portuguese authorities must take the initiative by introducing nurse retention, re-activation, remigration, and recruitment measures, including:

- expanding the code of practice: more responsibility and leadership roles for nurses
- following the principles of CPD: offer and reward professional development of active nurses and those who have changed careers
- foster long-term professional growth and international cooperation: allow nurses to receive education, training, and gain experience abroad

3. Methodology

3.1 Context of the study

By approaching recruitment in healthcare from a strategic communication standpoint, this Master's project aims to propose a sustainable and efficient solution to the ongoing challenges in nursing from a German-centred approach. Although the focus lies on successfully utilising strategic communication from the perspective of a German organisation, regarding the international and European situations surrounding healthcare provision and nursing is a necessity. Ultimately, the intended outcome is a fully developed conceptual strategic communication approach to recruit nurses in Portugal to a hospital in Germany, under realistic circumstances and ethical guidelines.

The key factors for a successful realisation pointed out by the literature research are divided into the macro, meso and micro level stakeholder perspectives. As explained, the macro level contains the perspective on the health system or the perspective of its stakeholders, such as policymakers and the Portuguese and German society. Existing research, international guidelines and developments, as well as a state of the sector analysis for the countries of Portugal and Germany serve as a reflection of the macro level perspectives on the topic.

At the meso level a combination of literature review and empirical research in form of two interviews (unstructured and expert) serve as valuable insight into the macro level and further the development of the quantitative research tool. One key interview partner represented the perspective of nursing students in Portugal, another represented the organisational perspective of a German hospital aiming to recruit nurses from abroad. The perspective of individual nurses in Portugal is located on the micro level and will be evaluated in the empirical study through a quantitative questionnaire. As applied research, the gathered data will serve in the planning of the strategic communication.

In creating a strategic communication approach on the micro-level, academic motivation is a key concept to learn about nursing students' professional intentions and sentiments. On this basis tailored EVPs can be developed and as part of the message tactics. In regard to the communication strategy for recruitment, the subscales reflect different candidate profiles and provide valuable insights for message tactics and stakeholder analysis. Hence the following research questions are to be answered:

3.2 Research questions

1. *How would a strategic communication approach for international recruitment in a healthcare setting look like?*
2. *What strategies can effectively persuade young Portuguese nurses and nursing students to pursue employment opportunities in Germany?*
3. *How can a specialised German clinic optimise its Employer Value Proposition (EVP) to appeal to young Portuguese nurses?*
4. *Which targeted messaging tactics should be developed within ARCUS' strategic communication initiative?*

Research objectives

The objective of the empirical research as part of this project is to direct and consolidate the tactics in the strategic communication plan. Serving as arguments for the general strategy as well as the basis for the message tactics, the collected data plays a key role in the strategic communication efforts of the respective organisation. Effectively, the data will guide the strategic communication process by defining the key target audience of young Portuguese nurses. The results of the questionnaire aim to establish an understanding of the perspective of nursing students in Portugal and their attitudes towards education, professional development, and emigrating abroad for professional reasons. The goal is to gain quantifiable data which can be used to create and justify tactical measures regarding their recruitment to a clinic in Germany.

One indicator is *academic motivation*, which plays a significant role in the study behaviour and career development of students and serves as an indicator on how to construct messages when communicating with nursing students. Measuring amotivation, extrinsic or intrinsic motivation of nursing students allows insight on why they study nursing, a field known for disproportion between intensive labour and poor working conditions compared to the financial reimbursement. Knowing what nursing students pursue and value most in their studies will improve stakeholder relations and message tactics in the strategic communication approach for their recruitment (see *academic motivation*).

Based on the findings in the state of the sector analyses, the willingness of Portuguese nurses to emigrate matches the increasing demand of German hospitals for internationally qualified nurses. Although there are various efforts on macro and meso level on the German side to support recruitment and promote recruitment strategies, there is no coherent practice of

supporting communication between the stakeholders. Based on existing research on pull factors in nurse and health worker labour migration, the study asked participants to state the main reasons why working abroad is attractive to them (see *main pull factors*).

For further insight into the factors surrounding employment abroad, the questionnaire aimed to collect data on desirable employment conditions. The importance attributed by the participants to salary, location, and professional development was assessed, as well as the willingness/openness towards learning a new language, studying whilst working, and receiving vocational training. Results here will influence the development and communication of the employee value proposition as part of the employer branding tactics (see *employment conditions*).

The literature review has provided profound insight on the debate in the field of strategy, communication, management and strategic communication. The questionnaire data adds insider context to the theoretical concepts by providing first hand assessments by a stakeholder group. The challenge of the project will be to utilise all findings in the context of hospital management and international recruitment. Therefore, the goal of the quantitative research effort is to create an empirical basis for the development of effective recruitment strategies for a German clinic, specifically, tailored for young Portuguese nurses.

3.3 Research object

The addressed organisation and one object of this study are the *ARCUS Clinics Pforzheim*, located in Pforzheim, Baden–Württemberg, Germany. The other research object are young Portuguese nurses and nursing students. Both sides are equally important in the development of this project.

ARCUS

The history of *ARCUS* begins in 1995, when the “Arcus Sportklinik” started out as a small private clinic specialised in orthopaedic surgery, located in Pforzheim, a medium sized city located in Germany’s Southwest in between Stuttgart and Karlsruhe. Due to initial success and high patient demand, the much larger “Arcus Klinik” was opened in 2006, as a partially public hospital (included in the bed requirement plan of the state of Baden-Württemberg) serving patients of all insurance types. Two modern, three-level high buildings were built to accommodate six operation rooms, three infirmaries, two MRIs, a pharmacy, a restaurant, and a helicopter landing pad.

Since then, *ARCUS* continued to grow in size regarding patient output and employed personnel. Three new buildings were added to separately accommodate the administration department, a rehabilitation centre, as well as a children's day nursery. Now considered as one, the *ARCUS Clinic* offers comprehensive medical services in the field of orthopaedics and traumatology, including diagnostics, surgical interventions, and rehabilitation, with a focus on minimally invasive procedures and advanced joint replacement techniques. With approximately 715 employees, *ARCUS* is one of the largest privately owned employers in the region and more importantly the only hospital established, run and fully owned by medical practitioners.

ARCUS is specialised in artificial joint replacement (Total Endoprosthesis), as well as sports-related injuries, with professional athletes being regular patients. The core of the organisation is the medical department, in which the joint replacement operations (knee, hip, shoulder) make up the vast majority of all cases and are the main revenue source. With over 12,000 surgeries annually (including approximately 4,700 knee and hip joint replacements) and around 72,000 outpatients each year, the *ARCUS* has developed into one of the largest centres for orthopaedics, sports trauma, and trauma surgery in Germany and Europe.

In terms of patient demographics and reputation, the *ARCUS* enjoys an excellent reputation among patients, employees and the medical community. On various online platforms (see for example Jameda.de, 2024; Klinikbewertungen.de, 2024) and according to internal surveys, patients report high satisfaction due to the clinic's commitment to personalized care and the expertise of its medical staff, who are considered leaders in their fields. This is also reflected in the exceptionally high number of conducted surgeries. In 2023 most knee joint replacement treatments of publicly insured patients in Germany were conducted at the *ARCUS Clinics* (2,456 cases) (Bundesministerium für Gesundheit, 2024). Based on their self-reported statistics, *ARCUS* conducts a total number of over 4,000 knee joint replacements a year.

Over the last fifteen years *ARCUS* was able to constantly increase the numbers of commendations from specialists and other healthcare providers, which reinforced the multitude of cooperative relationships between the clinic and referring medical practitioners. This positive reputation attracts patients not only from Germany but also internationally, adding to the clinic's diverse patient demographics. Furthermore, with an overall complication rate of less than 0.4% and an official 97% patient referral rate, *ARCUS* is considered Germany's leading clinic in its field and therefore serves as a best-practice example in this project. The benchmark basis allows to develop strategic communication on a high level where all options can be explored regarding the target group – the other object in this study.

Young Portuguese nurses and nursing students

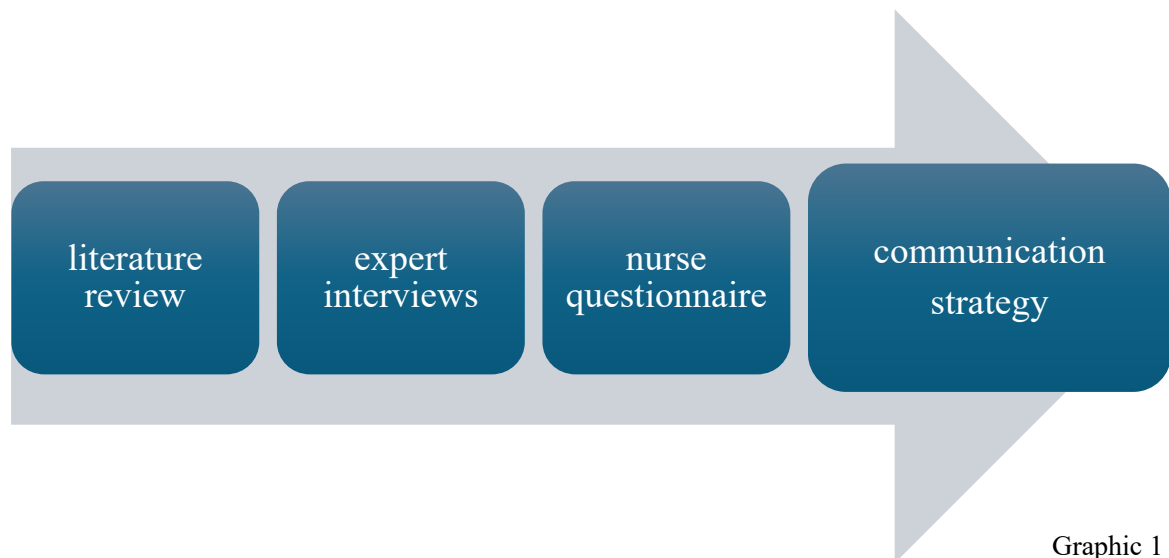
Due to the geographic and cultural proximity, as well as the highly regarded, EU-standardised education they receive, Portuguese nurses are considered a promising source of human capital for international health systems and are a considerable option for a German health organisation such as the *ARCUS*. Partially responsible for the situation that Portuguese nurses are considering leaving the country are the economic and systematic conditions in Portugal. Both sides represent several push and pull factors which have to be considered in the research and the strategic communication planning.

Based on the literature and the conditions given by the chosen organisation, the targeted group in the empirical research was chosen to consist out of current nursing students, recent graduates and those interested in specialised education and professional development. The focus on professional development and education offerings as part of the recruitment strategy was due to the mix of the specialised nature of *ARCUS*, sustainable recruitment concepts such as the German state initiative “Triple Win” and others, as well as a result of an analysis of global competition for nurse workforce talent.

Recruiters from the UK and Ireland have been one of the most active foreign players in the Portuguese healthcare landscape for the recruitment of health workers (OECD & European Commission, 2024). The low language barrier and the streamlined procedures have established the UK as a leading destination country for Portuguese nurses. Therefore, developing a German approach had to include new “selling points” or EVPs in order to be competitive and balance out existing barriers such as the language. As young professionals are usually more flexible in changing employers and residence, whilst being receptive for additional qualification and vocational training. Another factor was the accessibility of students and recent graduates, for the sake of this project but also for international employers.

3.4 Methodological approach and design

The methodological design of this study is based on two qualitative, explorative interviews with key informants from the nursing and clinical sector. The nurse side is represented by a Portuguese nursing expert, whilst the organisational perspective is presented by the head of HR and care management of *ARCUS*. Following their insights a qualitative questionnaire was developed to investigate the perspective of young Portuguese nurses. The online survey was created in *GoogleForms* and intends to collect empirical, quantitative data which completes the foundation for the strategic communication process (see Graphic 1).



Graphic 1

3.4.1 Interview design

The two interviews were conducted with experts from healthcare and nursing, and served as an explorative tool gather first-hand knowledge about nursing and healthcare personnel management. The goal was to, on the one hand, clarify the findings from the literature review, on the other hand, overcome the literature limitations and extent knowledge with practical experience from within the field. In order to get the according Portuguese and German perspective, the interview partners were chosen to be experts from each country: a young Portuguese nurse (<30 years old) and an experienced, former German nurse (>40 years old), who is now head of HR and nursing management. It was important that both interview partners had several years of practical experience in nursing.

The interviews aimed to give the experts as much room to explain their perspectives as possible by asking open questions and allowing longer elaborations or topical direction changes. Each interview was designed to take approximately 70 minutes and was conducted via *Microsoft Teams*. The questions focused on the experts' experiences surrounding the current situation of the nursing workforce and what role labour migration plays. Specifically, both experts were asked how present the issue of international recruitment is, and how recruitment between Germany and Portugal could be realised in an ethical way that would serve both sides. In this regard, the interview questions were designed to be non-leading and do not imply any specific approach or strategy.

3.4.2 Survey design

The content of the questionnaire, focusing on the Portuguese nursing students' perspective, will be distinguished in three areas: *academic motivation* (Vallerand et al., 1992), attitudes towards factors related to working abroad (*Main pull factors* and *Employment conditions and benefits*), and *demographic data*. Fully written in Portuguese language, the completion time was estimated to be between four and five minutes. Each items had to be answered in order to continue to the next. Participants were able to leave the survey platform and return at a later moment to continue. Surveys that were not finished were not able to be submitted.

Academic motivation

The questions about academic motivation come from a previously validated scale by Vallerand et al. (1992) that measures extrinsic, intrinsic, and amotivation in education. Academic motivation is not only affecting academic success in nursing students, it is also a factor in the continuation of learning and the development of training competencies (Rafii et al., 2019). Hence, the AMS will be used in the questionnaire, with minor modifications in the wording (e.g. changing “college” for “university”) and a fewer but equally balanced and proportionate number of items (14 instead of 28). The number of items was reduced to keep the survey balanced and participants engaged throughout the answering process.

In regard to the communication strategy for recruitment, the subscales reflect different candidate profiles and provide valuable insights for message tactics and stakeholder analysis.

Main pull factors

Before continuing to the items regarding working abroad, participants who were averse to emigration or working abroad were separated from the rest. Participants who answered the question “Have you ever considered working abroad?” with “No.” instead of “Yes.” Or “No, but I am interested”, automatically continued with the demographic questions.

First, participants were asked to indicate their preferences on destination countries. Ten options were listed: Germany; Switzerland; Belgium (BENELUX), Netherlands, Luxemburg; UK & Ireland; Norway, Sweden, Finland; Spain; USA & Canada; France; Brazil; and Angola, Cape Verde, Guinea-Bissau, Mozambique and São Tomé and Príncipe (PALOP). Due to several factors such as geographic location and relevance in migration flows, based on the previous research, country groups were formed in five out of ten occasions. The Portuguese speaking countries (PALOP) were combined in one group due to a similar migration/emigration factors

pattern. The same was applied for the countries Belgium, the Netherlands, and Luxemburg (BENELUX). “USA, Canada” represent the major north-american destinations, “Nor, Swe, Fin” represent scandinavia as a destination, and the “UK, Ireland” were grouped representing a similar destination in terms of location, health system recruitment and working conditions. Brasil, France, Spain, Switzerland, Germany were listed separately because of their importance for Portuguese emigration and their differing approach to nurse recruitment. In particular Switzerland, as a German speaking host country and the biggest competitor to Germany, had to be listed separately. Austria was not regarded, as the majority of migration flows come from Eastern Europe and there are no notable recruitment differences to Germany. An extra item was added in this context, which asked participants to answer the question whether they would eventually like to return to Portugal with “Yes” or “No”.

Subsequently, the participants were asked to indicate the main reasons why they are considering working abroad. Based on previous research on labour migration in healthcare in Europe, the following options were listed. Multiple answers combinations were allowed.

- Better career opportunities
- Higher salary
- Advanced/more accessible education opportunities
- Quality of life
- Having friends/family living in the destination country

Employment conditions and benefits

Furthermore, data was gathered on the participants perceptions on, expectations and attitudes towards the employment conditions when working abroad. The following items were regarding evaluating the factors: salary, professional development, language learning, studying whilst working, location. They were to be rated on a Likert-scale from “1: does not correspond at all” to “7: corresponds exactly”. In order to reduce response biases, each factor is represented in two reverse-worded items. However, statements were formulated so they could provide relevant data individually, if there were significant observations.

23) “A significantly higher salary is the only reason why I would consider working abroad.”

30) “Working abroad is all about professional development, the salary or the location are secondary.”

24) “A full scholarship for a master’s degree abroad is something I would be interested in.”

- 29) “When working abroad I would not want to study simultaneously.”
- 25) “I am not willing to learn a new language in order to work abroad.”
- 27) “Paid and organised language courses would positively influence my choice of joining a hospital abroad.”
- 26) “The offering of vocational training courses would influence me positively in my consideration.”
- 31) “I don't see the benefits of receiving vocational training when working abroad.”

Demographic data

In order to maintain participants engaged, the major bulk of items regarding demographic data were inserted at the end of the survey. However, for comprehension and data management reasons, some demographic items were inserted in between the sections, such as the “stage in nursing education” where participants had to choose between “Bachelor/Undergraduate”, “Master, (Post-)Graduate”, and “Doctorate/PhD”. This was followed by the specific question on specification: “Are you currently / would you be interested in studying the master course ‘nurse management?’”. Answer options were “Yes”, “No”, “Maybe. I don’t know yet”.

The remainder of the demographic items was placed after the *employment conditions* section, as the final section. To motivate participants to complete the survey, the sub-heading read “Last questions in the survey!”. The last four items were gender, age, marital status and amount of kids. For data analyses and sample purposes, as well as in regard for the later project implementation context, five age groups were created: “18-21”, “22-24”, “25-27”, “28-30”, “31+”. The last item read “On which social media platform are you active and would like to receive international job offers?”. Participants were able to give multiple answers. The options included the major social media platforms (*Facebook, Instagram, LinkedIn, TikTok, YouTube*) and the option to add other platforms.

3.4.3 Data collection

Using the free tool *GoogleForms*, a link to the online questionnaire was disseminated via social media and various messenger services, as well as in the field (with a scannable QR-code). Field distribution occurred on-site of nursing schools and universities in the Lisbon area. Dissemination via online channels, was realised namely via the social networks *Facebook, Instagram, LinkedIn*, and the messenger app *WhatsApp*. The vast majority of distribution took place on the individual level, for which standardised templates with customisable letter heads

were created. Various attempts to disseminate via institutions were made, but most data came from more informal attempts on student-to-student level.

For example, through networking amongst colleagues, communication with nursing students of the *UCP* was established. This enabled the access to several *WhatsApp*-groups of nursing students at the *UCP*. Similar success was achieved through a personal presence on campuses, such as the *Escola Superior de Enfermagem de Lisboa (ESEL)*. By making direct contact through conversation, students from technical nursing schools were recruited to take part in the study. Due to the geographical proximity of the *ESEL* to the *UCP*, most participants were recruited from there. After the brief explanation of the project and the survey, a pre-made QR-code gave participants access to the survey webpage. Additionally, the participants were encouraged to share the weblink amongst their colleagues. The nursing students appeared to be highly supportive and gave throughout positive feedback, which helped the survey to spread further amongst the target group.

Next to on-site distribution in person and word-of-mouth, especially the distribution on the job-platform *LinkedIn* proved to be highly effective. Generally strong feedback which was often received within less than three days, indicates a large portion of the target group being active and approachable on *LinkedIn*. Helpful for data collection on *LinkedIn*, apart from the advanced search filtering tools, was the digital presence of most major Portuguese nursing schools and universities. The possibility for current and former students to link their schools and graduation years in their profile, made the search for target profiles effectively easier. To be able to access the full potential of *LinkedIn*, a one-month test-version of the professional tool “Recruiter-Profile” was activated. This enabled visibility of target profiles and the direct messaging on the platform. In sum, a total of 109 personalised messages were sent out on *LinkedIn*.

Digital presence of Portuguese nursing schools and nursing university faculties also simplified the search for participants on *Instagram* and *Facebook*. Through the list of followers of the official accounts, student profiles were contacted with a “Direct Message” (if possible). Furthermore, by joining several *Facebook*-groups related with the topic of studying nursing in Portugal or practising as a nurse in Portugal, the survey-link was shared. However, there was no direct feedback from *Facebook*-members and there were no apparent connections to increased response rates. In general, groups and institutional channels in context of nursing in Portugal appeared to be less active and often not updated in years. Response rates on *Instagram* proved to be higher as target profiles were identified easier due to more active institutional

channels. Through the list of “Followers” of institutional accounts, profiles were contacted with the same message template used on *LinkedIn*.

3.4.5 Sampling

The study focused on “young nursing students in Portugal”, which meant participants had to currently live, work or study in Portugal. For simplification, this group will also be referred to as “Portuguese nurses”, disregarding the nationality or citizenship. The specific employment status was not regarded. Under these conditions the definition of being a nursing student was set slightly broader. The basic precondition was to be currently enrolled in a bachelor’s degree in nursing or having obtained one in the past. This meant current or former master’s and PhD students were also included. In the end, it was important that the participants were living, working and/or studying in Portugal.

The Bologna system divides studying nursing into a mandatory bachelor’s, a non-compulsory master’s degree, and a PhD as the highest level of the educational degrees in nursing. This leaves several candidate profiles to be considered. A fully practising young nurse in Portugal may possess a bachelor’s degree, is not enrolled at university but may be interested in obtaining a master’s degree to specialise. The same counts for nurses with a master’s degree who may be interested in further specialisation, enhancing their skills through vocational training, or obtaining a PhD. Therefore, the study aimed to also include practising nurses below the age of 30 years who were not currently enrolled at university or technical school.

Participants were divided into the age groups “18-21”, “22-24”, “25-27”, “28-30”, and “31+”. The interval for the youngest age group was chosen from 18 to 21 because it includes the youngest undergraduate level students whilst excluding master, post-graduate or PhD students. Following the vast majority of student profiles and the most usual university career paths, the age groups “22-24” and “25-27” include master students, whilst during the ages 28 and older students either are postgraduates or doctoral students.

After completion, the online survey counted a total of 81 valid responses. Out of the 81 participants 55 were female, 24 male, and two participants stated “other”. The gender distribution of the participants reflects the general gender (dis)proportions amongst Portuguese nurses and nursing students in Portugal, however, as the proportion of male participants is higher than the general ratio amongst the Portuguese nursing workforce, the sample is not representative in terms of gender proportions.

3.4.6 Data analysis

Following the collection phase, the data was extracted from *Google Forms* into a spreadsheet format in *Microsoft Excel*. Incomplete or inconsistent responses were removed. The academic motivation amongst the participants was evaluated (Vallerand et al., 1992). The third data set analyses.

Here basic sociodemographic data (gender, age, marital status, number of children).

To carry out this process, the software IBM SPSS (Statistical Package for the Social Sciences), was used for statistical analysis, visualisation, and interpretation)Effectively structuring the data, IBM SPSS enables a visual representation of statistical evidence generated by the questionnaire, allowing to draw conceptual conclusions and supporting the development of the final project.

The research aims to on the one hand advance the understanding of a multi-level phenomenon (fundamental research), and on the other hand apply the learnings in practice (applied research). In particular, the generated data combinations enhance the overall understanding of the target group (nursing students) and accordingly influence the development of the message tactics. Furthermore, the findings for the target group can be compared to outcomes and hypotheses of other studies, to identify, confirm or contradict contextual factors. Cronbach's alpha for academic motivation measured 0.81, which shows internal consistency.

3.4.7 Ethical considerations

The research conducted for the realisation of this project followed the ethical principles of the guidelines of the Faculty of Human Sciences of the Universidade Católica Portuguesa. It is worth mentioning that ethical considerations were a critical component of the research design, ensuring the protection of participants' rights, the integrity of the data collected, and the overall credibility of the research process. Prior to participating in the survey, all respondents were presented with a detailed informed consent form. This form outlined the purpose of the study, the nature of the questions to be asked, and the expected time commitment for the participation. Participants were explicitly informed that their participation was voluntary and that they could withdraw from the survey at any time without any consequences. In order to proceed with the survey, participants had to indicate their consent to participate. The survey questions were carefully crafted to avoid causing distress or discomfort to participants. Questions were framed neutrally and designed to rule out any potential psychological or emotional impact.

In this study, data protection was ensured by following the guidelines of the General Data Protection Regulation, which governs the processing of personal data in scientific research (European Union, 2016). Participation in the online survey was anonymous, ensuring that no identifiable personal information was collected. The collected data were stored securely on encrypted servers and were only accessible to the researcher for analysis purposes (European Union, 2016). All data handling processes followed the ethical standards for empirical research to protect participants' privacy and confidentiality (Creswell & Creswell, 2017). The survey platform used for data collection complied with data protection standards, and all data was stored on password-protected devices. Any data transfers for analysis were carried out securely, ensuring the integrity and confidentiality of the data were safeguarded throughout the research process.

3.5 Data presentation and analysis

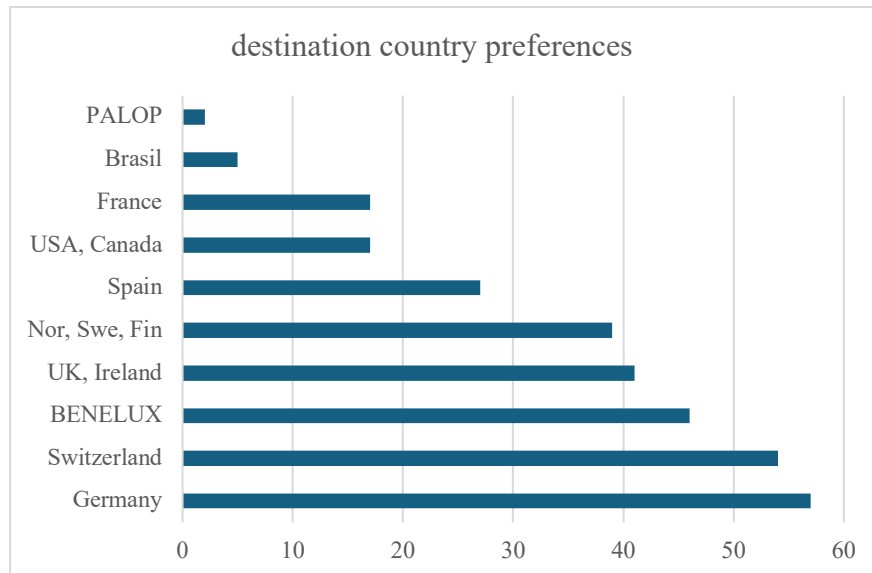
Demographics

The questionnaire counted 81 participants. About a third of them are male (N=24), two participants indicate “other” and with 55 out of 81 participants, the majority is female. Participants are divided into five age groups: 18–21 (N=46); 22–24 (N=15); 25–27 (N=12); 28–30 (N=4); 31+ (N=4). The vast majority of participants is single (N=68), eleven indicated “other”, two are married. Most participants have no children (N=77), four participants have children. Most of the participants are enrolled in or holding a bachelor’s degree (N=69), followed by master’s degree (N=10) and the doctorate/PhD (N=2).

The majority of participants (N=43) are Bachelor students of age 18 to 21. The second largest age and degree combination are bachelor students of age 22 to 24. Most master students were 25 to 27 years old. The question “Are you currently / would you be interested in studying the master’s course ‘nurse management’?” had the options “Yes” (N=26), “Maybe, I don’t know yet” (N=33); “No” (N=22). A large majority of participants stated they are or have been considering working abroad (N=73), and also that they would like to return to Portugal afterwards (N=70).

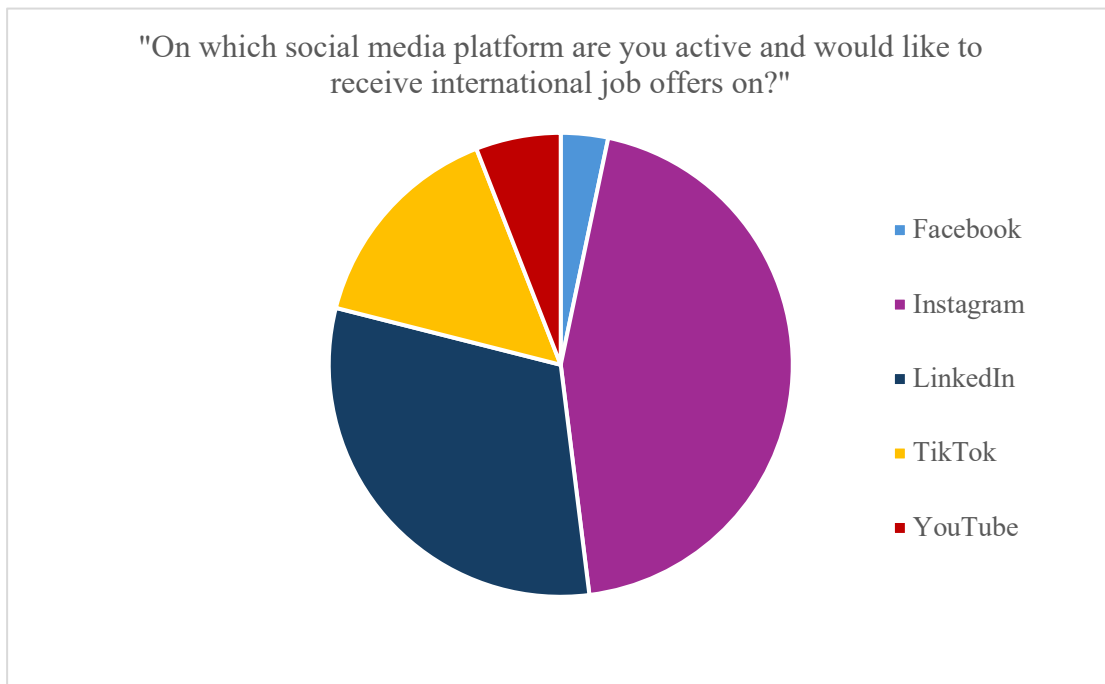
Previous studies have predominantly focused on the UK, Switzerland and Spain as destinations for emigrating Portuguese nurses (Leone et al., 2013, 2020; C. Pereira, 2019; C. Pereira & Azevedo, 2019; Ribeiro et al., 2014). However, in this survey a majority of 57 out of 81 participants stated Germany as one of their preferred destination countries to work abroad, highlighting the importance of Germany as a destination country to be further studied (see

graphic 2). As partially indicated throughout the literature review, the UK and Ireland are major destination countries (N=41), right behind the BENELUX countries (N=46). The second most popular destination country is Switzerland (N=54).



Graphic 2

Additionally, the participants indicated which social media platform they are currently actively using, and they would like to receive international employment offers on. *Instagram* had most active users who would be open for job advertisements (N=68), followed by *LinkedIn* (N=47) and *TikTok* (N=23). The video platform *YouTube* (N=9) and the declining social network *Facebook* (N=5) received the least votes amongst the participants.



Graphic 3

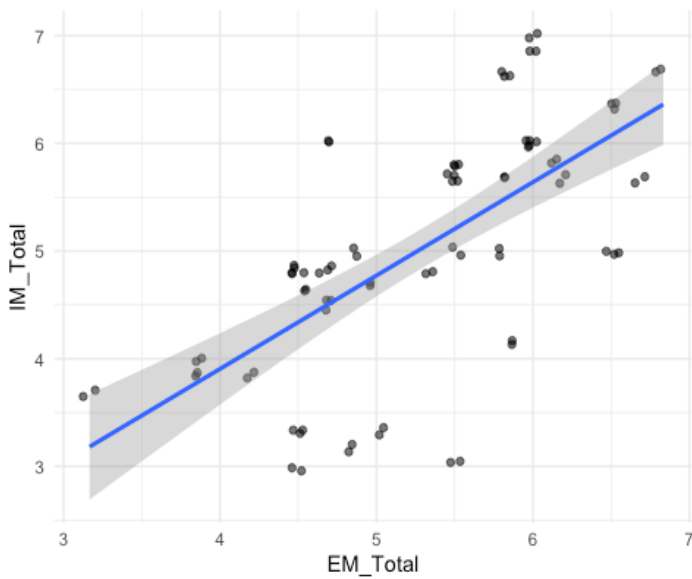
Academic Motivation

First, the data of the three types of academic motivation; intrinsic motivation (IM), extrinsic motivation (EM), and amotivation (AM) were explored for correlation. Using the Pearson correlation coefficient allows to create the following matrix:

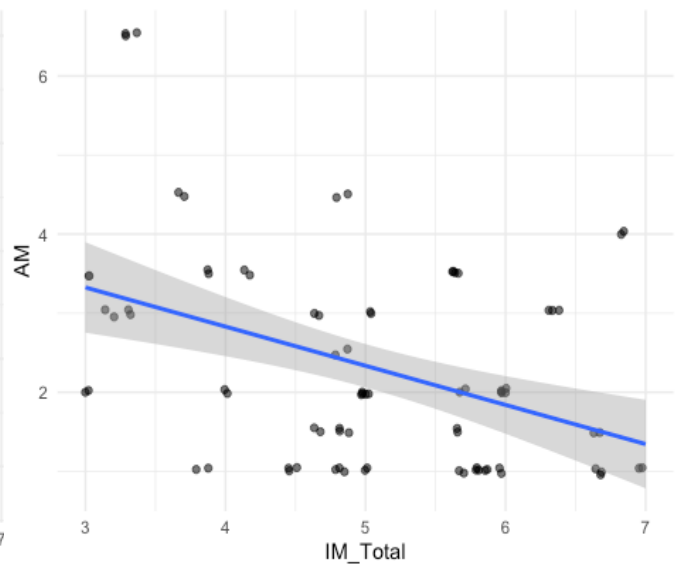
row	column	cor	p
IM_Total	EM_Total	0.67	< .001***
IM_Total	AM	-0.41	< .001***
EM_Total	AM	-0.27	.016*

Table 1

The p-values listed in the table show that all correlations are statistically significant. Intrinsic and extrinsic motivation are correlated in the sample (when one is higher, so is the other), while both types of motivation are negatively correlated with amotivation (see table 1). Notably, intrinsic motivation is particularly strongly negatively correlated with amotivation. Visualising the findings, the following graphs are scatterplots showing each participant's score on the three kinds of motivation (two at a time). A regression line of best fit with corresponding confidence interval is added in blue (see graphics 4 and 5).



Graphic 4



Graphic 5

To test for differences of academic motivation amongst the genders, a Welch’s two sample t-test showed no gender differences for any of the three kinds of academic motivation (AM $p=0.4$; IM $p=0.2$; EM $p=0.4$). However, there were notable differences amongst the age groups in relation to academic motivation ($p<0.001$).

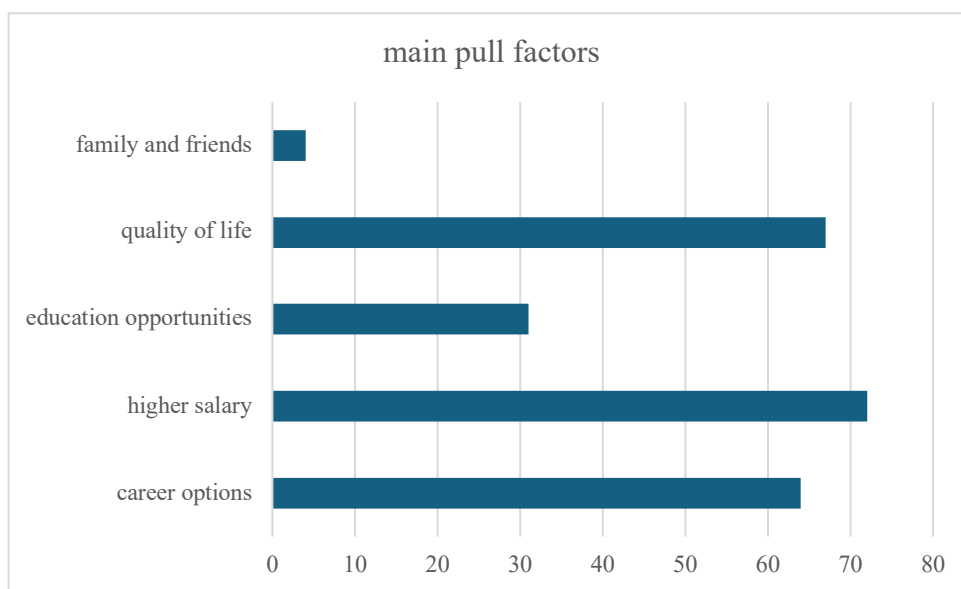
Participants of the age 28 and over were removed, because the groups “28–30” and “31+” were only consisting out of 4 members each, holding no significance in age differences when comparing to the other groups. The remaining three age groups “18–21”, “22–24”, and “25–27” were positively tested for one significant difference: the total extrinsic motivation (EM). Least EM was measured in the group “22–24” (Mean: 4.78), followed by the 18–21 years olds (Mean: 5.37), and with the 25–27 years old participants having the most extrinsic motivation levels (Mean: 6.11).

To further explore the significant difference across age groups for total Extrinsic Motivation, a Tukey HSD test was conducted (Wallace & Yamashita, 2011). According to the Tukey test for multiple comparisons of means, there are three significant differences: those aged 22–24 report less EM than those aged 18–21; those aged 25–27 report more EM than those aged 18–21; and those aged 25–27 report more EM than those aged 22–24.

$$EM: 22-24 < 18-21 < 25-27$$

Main pull factors

Before answering questions related to working abroad, the participants were asked whether they are interested or ever have considered to work abroad. A negative reply would lead straight to the demographic items section, whilst positive answers allowed a regular continuation. The first items included the participants current level of education, whether they are interested in the master’s degree of nursing management, and (if they are open to work abroad) what specific pull factors influence their decision to work abroad. The participants were allowed to choose multiple of the following factors: Better career opportunities, Higher salaries, Advanced education/research opportunities, Quality of life, Having friends/family working in the destination country, Other (see graphic 5).



Graphic 6

Employment conditions and benefits

Following, the factors relating to working abroad were tested for differences against the demographics. For the 55 female and 24 male participants were no differences found for the foreign employment conditions.

As before, for age comparisons the groups 28 years and older were removed due to their insufficient sample size. A one-way ANOVA was used to detect a significant difference in one item: 22) “A scholarship for a master’s degree at a university abroad is something I would be interested in.” (studying_positive) (p=0.012). For further exploration the data was run through a Tukey HSD test, which revealed two significant differences. Those aged 18–21 report less agreement than those aged 22–24, and those aged 25–27 report less agreement than those aged 18–21.

Agreement with 22): 22–24 > 18–21 > 25–27

Further employment related factors were the openness towards a) learning a new language, b) studying whilst working, and c) undergoing vocational training.

- a) For the factor “new language”, item 25) was formulated positive towards offerings of language courses, whilst the negative counterpart statement of item 23) indicated lesser motivation to learn a new language. Respectively, scores were high (5.96) for 25) and low (1.9) for 23). This indicates openness amongst participants towards learning a new language when considering working abroad.
- b) In regard to the openness towards studying whilst working, item 22) “study_positive” scored higher (5.78) than item 26) “study_negative” (3.91). However, the difference of the two values was not as significantly great as for the factor “new language”.
- c) Openness for receiving/undergoing vocational training whilst working abroad item 24) “vocational_training_positive” scored 5.39, whilst item 29) “vocational_training_negative” scored 2.78. The difference is greater than in the factor b) “studying whilst working”, but lower than in factor a) “new language”.

Characteristic	N = 81¹
<i>External factors related to working abroad</i>	
21) higher salary most important	
Mean (SD)	4.83 (1.90)
Unknown	4
22) study_positive	
Mean (SD)	5.78 (1.15)
Unknown	4
23) language_negative	
Mean (SD)	1.90 (1.32)
Unknown	4
24) vocational_training_positive	
Mean (SD)	5.39 (1.56)
Unknown	4
25) language_positive	
Mean (SD)	5.96 (1.16)

Characteristic	N = 81¹
Unknown	4
26) location important	
Mean (SD)	5.75 (1.16)
Unknown	4
27) study_negative	
Mean (SD)	3.91 (1.90)
Unknown	4
28) professional development most important	
Mean (SD)	3.08 (1.64)
Unknown	4
29) vocational training_negative	
Mean (SD)	2.78 (1.75)
Unknown	4

Table 2

How do *employment conditions and benefits* relate to wanting to go to a certain country?

For the following table (table 3), the column labelled FALSE includes respondents who didn't want to go to that country, while the column labelled TRUE includes those respondents who did want to go to that country. For each of the *employment conditions and benefits* items a Welch's t-test was utilised to determine whether the mean response for that factor is similar across the two groups (those who didn't and did want to go to the country in question), concluding that it is not similar if the p-value is below .05. Welch's t-test was used because it does not assume equal variances for the two groups (Wallace & Yamashita, 2011). In particular, the three groups of the countries of Germany, Switzerland, and the UK and Ireland were analysed due to their relevance as preferred destination countries of the participants.

Germany

Characteristic	FALSE, N = 20	TRUE, N = 57	p-value¹
21) salary most important			0.10
Mean (SD)	5.40 (1.67)	4.63 (1.95)	
22) studying_positive			0.3
Mean (SD)	5.55 (1.00)	5.86 (1.20)	
23) language_negative			0.5

Characteristic	FALSE, N = 20	TRUE, N = 57	p-value¹
Mean (SD)	2.05 (1.23)	1.84 (1.36)	
24) vocational training_positive			0.7
Mean (SD)	5.50 (1.28)	5.35 (1.65)	
25) language_positive			0.3
Mean (SD)	5.70 (1.38)	6.05 (1.08)	
26) location important			0.040
Mean (SD)	6.15 (0.88)	5.61 (1.22)	
27) studying_negative			0.5
Mean (SD)	4.15 (1.57)	3.82 (2.01)	
28) professional development most important			>0.9
Mean (SD)	3.10 (2.05)	3.07 (1.50)	
29) vocational training_negative			0.077
Mean (SD)	3.40 (1.79)	2.56 (1.70)	

¹Welch Two Sample t-test

Table 3

Item 26) has statistical significance (p=0.04). This suggests that location holds varying levels of importance between the two groups. Across all other characteristics tested, none of the p-values fell below the common threshold of 0.05 and are therefore statistically irrelevant.

How do the *main pull factors* relate to destination country preferences?

For each of the following tables, the column labelled FALSE includes respondents who did not want to go to the respective country, whilst the column labelled TRUE includes those respondents who did want to go to said country. Each of the external factors (one factor per row) was tested whether the proportion of people selecting that factor is similar across the two groups (those who didn't and did want to go to the country in question), concluding that it is not similar if the p-value is below .05. The test used is a chi-square test, except in cases when the expected count in one of the cells is less than 5 (usually for factor_family and friends), in which case Fisher's exact test was used.

Germany

Characteristic	FALSE, N = 20	TRUE, N = 57	p-value
factor_better career opportunities	20	44	0.017
factor_higher salaries	20	52	0.3
factor_education opportunities	9	22	0.6
factor_quality of life	20	47	0.056
factor_family and friends	0	4	0.6

Table 4

Switzerland

Characteristic	FALSE, N = 23	TRUE, N = 54	p-value
factor_better career opportunities	21	43	0.3
factor_higher salaries	20	52	0.2
factor_education opportunities	9	22	0.9
factor_quality of life	18	49	0.2
factor_family and friends	0	4	0.3

Table 5

UK, Ireland

Characteristic	FALSE, N = 36	TRUE, N = 41	p-value
factor_better career opportunities	27	37	0.075
factor_higher salaries	31	41	0.019
factor_education opportunities	14	17	0.8
factor_quality of life	31	36	>0.9
factor_family and friends	0	4	0.12

Table 6

Spain

Characteristic	FALSE, N = 50	TRUE, N = 27	p-value
factor_better career opportunities	39	25	0.12
factor_higher salaries	45	27	0.2
factor_education opportunities	15	16	0.012
factor_quality of life	45	22	0.3
factor_family and friends	0	4	0.013

Table 7

BENELUX

Characteristic	FALSE, N = 31	TRUE, N = 46	p-value
factor_better career opportunities	22	42	0.019
factor_higher salaries	28	44	0.4
factor_education opportunities	8	23	0.034
factor_quality of life	24	43	0.080
factor_family and friends	2	2	>0.9

Table 8

Norway, Sweden, Finland

Characteristic	FALSE, N = 38	TRUE, N = 39	p-value
factor_better career opportunities	32	32	0.8
factor_higher salaries	33	39	0.025
factor_education opportunities	15	16	0.9
factor_quality of life	33	34	>0.9
factor_family and friends	4	0	0.055

Table 9

A higher proportion of participants that did not want to go to Germany valued “better career opportunities” as a main pull factor. In Switzerland there are no significant disproportions for none of the factors. Participants who want to go to the UK and Ireland are significantly more in favour of “higher salaries” than those who exclude the UK and Ireland from their favoured destination countries. Participants stating the BENELUX states as a preferred destination country are indicating that they did so because of “better career opportunities” and “advanced education/research opportunities”. For the Scandinavian countries of Norway, Finland and Sweden, it is the factor “higher salaries” that differentiates the participants that want to go from the ones that exclude these countries from their destination selection.

3.6 Discussion

Demographics

Starting with the demographics allows better coordination within the different categories and factors, whilst also guide lining the argumentation structure. Due to the exploratory component in the questionnaire, participation requirements of the target group were set quite liberal. The final demographic turnout is mostly representing bachelor nursing students below the age of 28 years. Considering this is the largest group amongst all nursing students in Portugal, this does not have to be regarded as a limitation for the later strategic communication approach.

On the contrary, not only does the sample portray the distributions in age, degree and gender, results of other items also coincide with the findings of the literature review. The general popularity of labour emigration in Portugal amongst nurse staff is reflected in the 73 out of 81 participants stating they are interested in working abroad. The fact that 70 participants state they would like to return to Portugal is indicating support of the fact that, unlike during the recession from 2008 to 2014, the reasons for nurses leaving Portugal are rooted in the health system and working conditions rather than in political, economic, social issues. However, this is not a fully empirically proven fact and only remains a suggestion for further research. In general, more substantial evidence would require more participants.

Main pull factors

Furthermore, there are notable shifts in the destination country preferences. According to vast majority of previous studies (in- and outside Portugal), higher salaries are the main reason for labour emigration. The results of this study are complying with this, when participants were asked to indicate the *main pull factors* which influence their decision to consider working abroad:

1. Higher salary
2. Quality of life
3. Career opportunities
4. Education opportunities
5. Family and friends

Amongst the participants which were interested in working in Germany, the ranking remained the same. However, all of the participants who categorially excluded Germany as a destination country have stated “better career opportunities” as a main pull factor (with proportionate

significance). This may indicate that Germany is not known as a destination country for enhancing individual career development, as other destinations may be perceived as offering more career pathways.

Spain has distinctively higher values for the factor “better education/research opportunities”. Arguably, this is partially due to the geographical and linguistic proximity, which has many Portuguese nursing students spend an Erasmus or exchange semesters in Spain, where they are able to gain early professional experiences. However, although this remains an assumption, it may underline that Germany as a destination country is lacking to portray educational opportunities towards international talent. Although Germany is a popular destination country, compared to other destinations, Germany appears to lack a “unique selling point”. As the factor “career development” is valued by all the participants that are not interested in going to Germany, it highlights the opportunity for German organisations to specifically include career development factors in their employee value propositions.

The results for the main pull factors are limited in terms of their precision and potential lack of topic comprehensiveness. Further research should also be based on more detailed theory on pull factors in terms of healthcare personnel migration. Also, again, a larger participant sample would have been preferable for more distinct conclusions and take-aways.

Academic Motivation

Although there are no implications regarding differences of gender, statistically significant differences were found in the total extrinsic motivation measured. After removing the age groups of 28 years old and over, the evaluation of the data indicates that the 22–24 year olds have the highest extrinsic motivation, followed by the 18 to 21 year olds and the 25–27 year olds. Extrinsic motivation consists out of three different kinds with different driving factors; external regulation (pressure/ rewards such as passing exams, graduating, or avoiding negative consequences), introjected regulation (internal pressures like guilt, shame, or self-worth), and identified regulation (participants understand the value of their academic tasks and choose to engage in them because they see how these activities align with their personal goals, even if the tasks themselves are not inherently enjoyable).

Identified regulation had the highest average rating amongst all sub-categories of extrinsic motivation (6.17). This suggests that the participants recognise personal value and importance of academic activities benefiting their personal goals, such as gaining knowledge useful for their future career. Although extrinsic, this sub-type of motivation is self-endorsed and personally meaningful. Therefore, high values in identified regulation

lead to a favourable potential candidate profile, as recognising the personal value of educational tasks leads to higher engagement. Engaging in an activity willingly because of personal growth, makes this form of extrinsic motivation more internalised than others. The profile is further defined by having persistence and long-term goals, as the individual would be characterised by continuing their studies without any short-term rewards.

The category identified regulation bridges the gap between extrinsic and intrinsic motivation by integrating personal values and long-term goals into the motivation progress. Characterised by high levels of self-determination, it reflects a candidate profile with deeper personal investment in activity based on its perceived importance and professional relevance. Therefore, the prevalent candidate profile is likely to be responsive for challenges when working abroad such as overcoming language barriers, vocational training, and education in a foreign country. Further research could profit from an expanded focus on Academic Motivation.

Employment conditions and benefits

In terms of employment conditions and offerings there were no significant differences found amongst genders, and only one was found in amongst the age groups. Item 22 asked the participants if they were interested in a master's degree scholarship in Germany. The age group 22–24 years has most interest in studying a sponsored master's degree in Germany, which is most likely connected to their current position in the education system. The mean value for agreement with item 22 amongst all master students is only 4.1, which means bachelor students between the age 22–24 is the group most accessible for educational scholarship offers.

When comparing participants who would want to emigrate and work in Germany (TRUE) with those who excluded Germany in their selection of destination countries (FALSE), there have not been any significant differences found, except for the item regarding the location of the workplace. The FALSE group places significantly greater importance on the location factor compared to the TRUE group. This indicates a stronger preference or dependency on conditions on site (of the city) for group FALSE. In turn, whilst still of importance, the city of their workplace is of less importance to participants who consider working in Germany.

Apart from the location, these results suggest that the two groups do not differ significantly in their attitudes or priorities regarding the other employment conditions and benefits factors tested for. Although there are indicators for other differences, for decision-making or further research, the focus might have to shift to understanding other variables or improving measurement sensitivity if subtle differences are suspected.

4. Strategic Communication Plan

4.1 Foundation Phase

The development of a communication strategy for a German clinic aiming to recruit nursing professionals from Portugal.

1. Foundation Phase
 - 1.1. Project Rationale
 - 1.2. Mission, Vision, Value statement proposals
2. Application Phase
 - 2.1. PESTLE Analysis: Healthcare Portugal & Germany
 - 2.2. SWOT Analysis: *ARCUS*
 - 2.3. Stakeholder Analysis: Recruitment of Portuguese nurses
 - 2.4. Benchmark Analysis: Philippine nurses
3. Implementation Phase
 - 3.1. Ambition Statement (external)
 - 3.2. Rationale Statement (internal)
 - 3.3. Objectives
 - 3.4. Timeline
 - 3.5. Planning Matrix
 - 3.6. Employer Branding
 - 3.7. Employee Value Propositions

4.1.1 Project rationale

Theoretical Framework	Project component	Application in the Project
Holtzhausen et al. (2021)	Creating Vision, Mission and Values statements	Foundation phase: Mission, Vision and Values statement build the foundation of strategic planning and execution
Alegre et al. (2018)	Vision, Mission Values statement	Formulation of improved statements for <i>ARCUS</i>
Banks et al. (2019)	Global talent management, HRM	Strategic recruitment across borders by standardised recruitment signals
Vallerand et al. (1992)	Target group: young nurses and nursing students	The AMS subscales reflect different candidate profiles.
Quantitative research nurse questionnaire	Message tactics	High Identified Regulation: messaging focuses on educational tasks, career goals, personal growth, high engagement
	Target group	Professional development: Extrinsic motivation is highest amongst nurses aged 25-27.
Johnston and Glenny (2021)	Situation Analysis	Application Phase: Identify external factors impacting the organisations' ability to communicate and evaluate existing communication and potential resources
Achinas et al. (2019)	PESTLE Analysis	Creating a broad perspective of the situation for a holistic approach
Helms and Nixon (2010); Tavares (2016)	SWOT Analysis	SWOT Analysis of <i>ARCUS</i> allows clear and simplified picture of the organisation for strategic proposals
Holtzhausen et al. (2021)	Stakeholder Analysis	Stakeholder Analysis grid for the organisation
Holtzhausen et al. (2021)	Benchmarking	Benchmark: comparison between nurse recruitment from the Philippines and Portugal as origin countries
Monteiro et al. (2020)	Employer branding	Employer branding for <i>ARCUS</i> follows the model for a medium sized organisation
Quantitative research nurse questionnaire	Employer branding	Employer/Employee relationship
	Employer branding, message tactics	For the target group with high global openness advertising must highlight organisations' global presence
J.M. Phillips et al. (2014)	Employer branding, message tactics	For the target group with high global openness advertising must highlight organisations' global presence
Mortensen and Edmondson (2023)	Employer Value Proposition (EVP)	Focus on three areas: <ul style="list-style-type: none"> • development & growth • connection & community • meaning & purpose

Asseburg et al. (2018)	EVP, message tactics	Recruitment messages must be tailored to transmit meaningful details about job role and org. values
Luxton et al. (2015)	EVP, message tactics	Targeted, multiplatform campaigns enhance visibility and candidate engagement

Table 10

“Ideas are conveyed through communication to an audience; and the audience assesses how to respond to the idea, based on how it is communicated.” (Remley, 2017, p. 2)

Following the mentioned elaborations on strategy, it needs to be stressed that strategy is always work in progress, which is – most importantly – consisting out of planning as the process, not a plan as a product (Van Ruler & Körver, 2019). In the words of renowned PR expert and strategic communication pioneer Prof. Dr. Dejan Verčič (p. 57 in Van Ruler & Körver, 2019):

“All wins (and loses) are temporal, and for that reason strategising and planning are continuous concerns. Being able to employ models for recognising structuration of various futures in front of you (...) increases requisite variety of choices you can make, and thus improves your chances of survival and growth.”

As of general consensus in Germany, today’s national health system could not function without internationally qualified nurses (IQNs). Given the limited domestic supply of nurses in the face of an increasing demand for medical services in Germany, recruiting IQNs is not only a strategic necessity but necessary for a long-term sustainability of the German healthcare sector. Single, privately held clinics, such as the *ARCUS Clinics Pforzheim*, must invest into global talent acquisition in order to remain competitive. Previously planned first efforts of recruiting nursing staff from the Philippines are still in effect and yet to be fully evaluated. However, intermediate analyses disclose that the outcomes are below expectations.

Recruiting young Portuguese nurses may be perceived as a short-term step in strategic communication, but establishing a new approach to work migration amongst healthcare professionals is a long-term multi-level endeavour. Hence, the aforementioned strategy approaches and frameworks have to be customised to the particular requirements of this research project. Recruiting healthcare professionals from another country, specifically young nurses, is a complex process. As mentioned in the state of the sector analysis, the global stock of nursing workforce is critically low and simultaneously requirements to work in healthcare are high – effectively complicating work migration processes for all parties.

Whilst the vast majority of other professions with qualified education backgrounds allow flexible work transitions in the Schengen-zone, health workers are partially restricted by bureaucratic obstacles and partially discouraged by policymakers and employers. For example, as opposed to the United States, there is no employment culture of location flexible work arrangements for nurses (or any other health workers) amongst the European states. Although there is noticeable labour migration from poorer to richer countries internationally and within the EU, health workers do not enjoy the same possibilities as highly qualified personnel in other sectors. Relying to a large extent on private facilitators, Portuguese nurses leave the country for hospitals and clinics in other countries that offer a range of benefits compared to their Portugal counterparts. Push and Pull factors are varying, however, ambitions of Portuguese nurses to emigrate are increasing as well as demand for nursing workforce in Germany.

Hence, this communication strategy proposal aims to connect these two parties to generate an efficient symbiosis, whilst respecting ethical guidelines and including the macro, meso, and micro perspectives of the healthcare systems, health workers and the patients into the holistic strategic communication process.

4.1.2 Vision, Mission, Values statement proposal

Modern medical treatment, particularly in orthopaedics and sport-trauma, strives to be as little invasive as possible – as an injury in an otherwise healthy body demands. Likewise, interventions on a strategic communication basis within the *ARCUS* – a “healthy” organisation – shall tackle only the necessary starting points to achieve the overall goal of recruiting nurses from Portugal. Establishing a communication basis directed at IQNs using the *ARCUS* website is a first step in the strategic communication process.

Vision

To be recognized as a benchmark institution in European sports medicine and orthopaedics, known for consistently having the lowest complication rates, and the highest patient satisfaction, whilst performing near maximum capacity. We aim to ensure a scientifically innovative and resource-efficient clinic environment that benefits both patients and employees in the long-term future.

Mission

To give as many people as possible the best treatment according to modern expertise in orthopaedics and sports medicine. It is our ambition to have every patient satisfied with our services – from the first call until the discharge and follow-up examinations.

Values

We are committed to delivering patient-centred care in a multicultural environment, offering specialised treatments that prioritize individual needs. We foster continuous professional growth for our employees, advancing medical innovation and promoting a culture of excellence, inclusivity, and collaboration.

... regarding **international recruitment**

Vision

We aspire to be the first choice for international healthcare talent looking to work in one of Germany's leading clinics in orthopaedic and sports medicine. By attracting and retaining health workers with different backgrounds, we aim to set a global standard for overcoming structural challenges in healthcare. We want to become the best employer in Europe for Portuguese nurses who aspire to become the best in their profession.

Mission

At ARCUS, we are dedicated to recruiting and supporting internationally qualified health professionals, ensuring they succeed in their professional development.

Values

We value diversity, collaboration, ethical recruitment, and continuous learning, fostering a workplace where international healthcare workers can thrive and contribute to excellence in patient care. In the recruitment of international healthcare professionals, we strictly follow the WHO guidelines and apply the "Triple-Win" philosophy – including the individual health worker and their origin country in our long-term value creation process.

At this point it is important to remember the holistic approach of strategic communication, as publicly displayed messages are reaching and influencing different stakeholder groups at once. In the case of *ARCUS*, the patient-directed messages are always influencing other entities simultaneously. Therefore, guiding principles with particular regard to patient care have to be taken into account for the recruitment communication. The following patient guidelines were established to specifically inform patients about *ARCUS*' medical principles and processes of successful patient care. The following box shall serve as a reference to the identity of *ARCUS*.

“Highest demands on the quality of patient care”

Based on a successful concept that is unique in Germany, the ARCUS Sports Clinic is one of the best treatment centres for artificial joint replacement and sports orthopaedics in Europe.

Our services are naturally aimed at patients with all types of insurance and self-paying patients.

Both patients and referring physicians appreciate the professional competence and high standard of care.

This is continuously confirmed by official measurements (*link to Patient Atlas*), independent patient surveys (*link to AOK*) and nationwide press reports (*link to BILD, FOCUS*).

“Seamless medical care thanks to specialization”

Our specialization and many years of experience in the fields of orthopaedics, trauma surgery and sports traumatology enable us to provide our patients with seamless care from diagnostics to therapy and rehabilitation.

Thanks to optimized treatment concepts, we can respond specifically to individual needs. The well-being of the patient is the top priority for every single ARCUS employee.

“Experience, routine and state-of-the-art technology”

High case numbers with a low complication rate and above-average patient satisfaction confirm our surgical approach.

We rely on cutting-edge technology and tried-and-tested implant material, as well as minimally invasive procedures in line with current practices.

Due to decades of experience professional routine and scientific research work, the doctors at the ARCUS Clinic are internationally renowned.

Interdepartmental communication, further education and training are an integral part of all medical staff.

Application Phase

4.1.3 PESTLE Analysis: Healthcare Portugal & Germany

The outcome of the PESTLE Analysis highlights external factors impacting strategic decisions and give an overview of the macro-level situation. In the following table the six categories of external factors regarding the topic of recruitment of internationally qualified nurses are listed, each for Germany and Portugal.

	Germany	Portugal
Political	Government encourages and supports foreign nurse recruitment, however not actively in the EU. Current government programs target Vietnam, the Philippines, Brazil, Tunisia, Jordan etc. Other countries (e.g. UK, Ireland) are more active in recruiting in Portugal.	SNS-crisis: working conditions/hours, salaries. Monthly strikes by nurses and doctors. EU law allows free movement. Increasing pressure on politics to prevent emigration of nurses. 1600 nurses emigrated in 2023 to work abroad.
Economic	High demand for nurses; competitive salaries (€2,800-€3,300/month); strong healthcare funding. No direct state benefits for recruitment efforts.	Low salaries (€1,200-€1,500/month); budget constraints, short contract periods, job insecurity. Many nurses seek better opportunities abroad. Decreasing ROI in education due to early resignation or emigration.
Social	Aging population increases nurse demand. Cultural openness to foreign workers, but language (B2 German) is a barrier. Measures for flexible working arrangements have been introduced	High nurse emigration due to poor working conditions. Social pressure to stay but outweighed by job prospects abroad. Cost for education and professional development is largely carried by nurses. ∅-cost (pub./priv.) in €: Ba 2800/3500; Ma 2700/9500; PhD 10500/21000
Technology	Advanced healthcare technology but slow digitalisation (e.g., EHRs, telemedicine) due to bureaucracy. Online recruitment, online job platforms (flexible work models) are not as advanced as in USA, UK, Ireland or Norway	Less access to cutting-edge healthcare technologies; fewer resources for modernising nurse training.
Legal	Permanent contracts, streamlined recognition of EU qualifications, strong labour protections (overtime, leave, job security).	Fixed term contracts, rigid labour laws. EU free movement allows easy migration to Germany.
Environm./ Ethical	Strong focus on sustainable healthcare and strict workplace safety regulations. Following WHO guidelines.	Challenging workplace conditions in underfunded public hospitals; fewer resources for health and safety.

4.1.4 SWOT Analysis: *ARCUS*

	internal	external
opportunities	STRENGTHS	OPPORTUNITIES
challenges	WEAKNESSES	THREATS

	internal	external
opportunities	financial stability reputation & employee satisfaction state-of-the-art facilities specialisation	growing demand expansion of services & procedures reform: shut-downs of competitors employee professional development
challenges	narrow medical focus location online presence (website) international appeal & outreach	intense competition political regulations healthcare reforms

Graphic 7

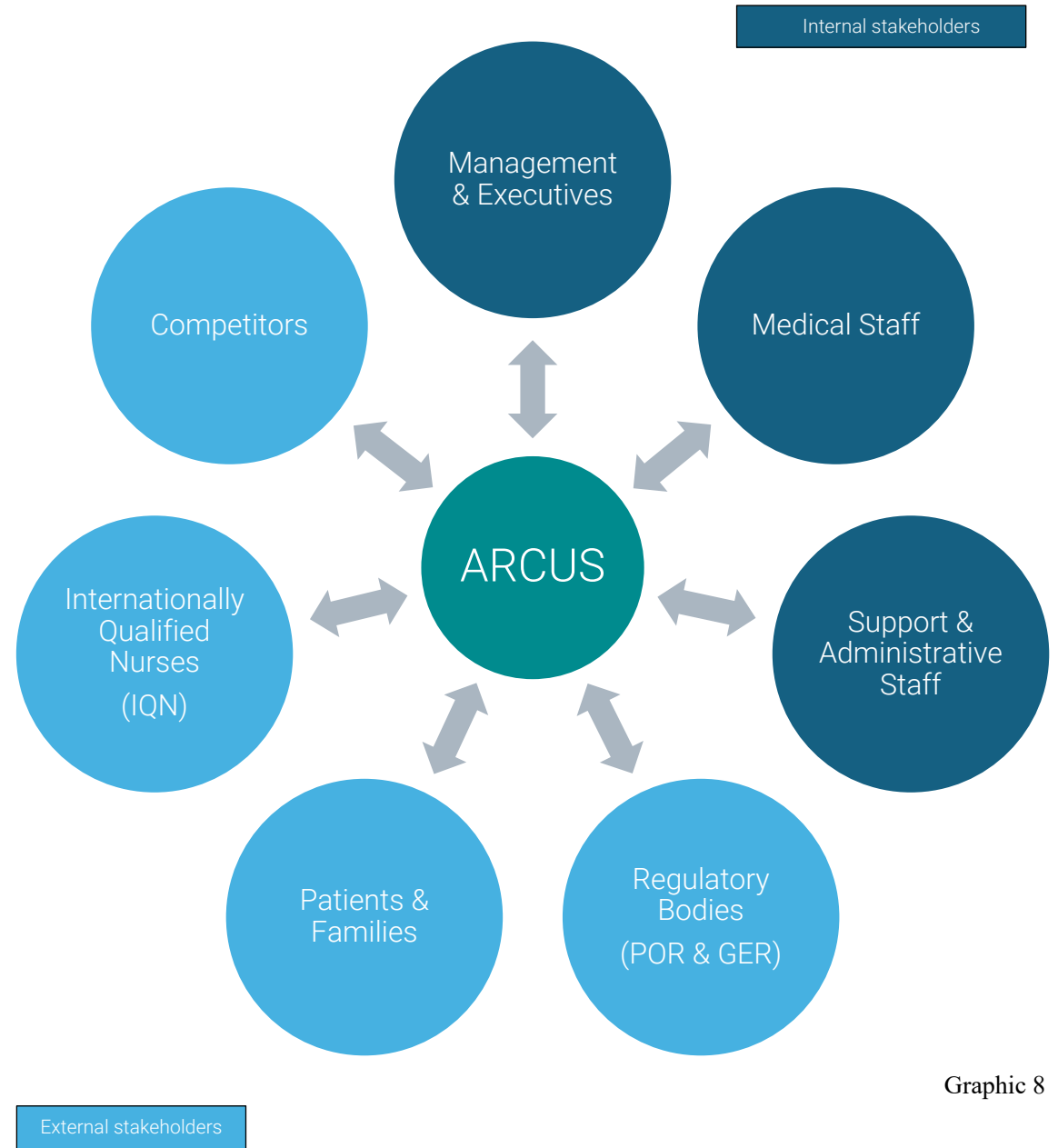
4.1.5 Stakeholder Analysis: Recruitment of Portuguese nurses

In health management, a stakeholder analysis serves to gain distinct advantages and achieve their objectives when interacting with other organisations.

This process involves mitigating potential threats or identifying potential allies to build alliances.

The following stakeholder analysis is taking into account the recruitment of Portuguese nurses.

It will serve for the short-term strategic planning, as well as periodically to assess both external and internal organisational environments, whether for immediate concerns or long-term prospects.



Graphic 8

Stakeholder	Influence	Interest	Communication engagement
Management & Executives	HIGH responsibility of strategic decisions, budget allocation, and recruitment priorities	HIGH tackling personnel shortage; quick and successful integration process	Engage closely ; involved in strategy KEY PLAYER
Medical Staff	MODERATE full collaboration is necessary for optimal integration	HIGH new employees must respect the existing work culture and workflow procedures	Engage openly ; ensure satisfaction; provide support; involve in tactics
Support & Administrative Staff	MODERATE documentation, onboarding, resource coordination	MODERATE avoidance of additional administrative burden	Keep informed ; provide training and resources; value innovation; involve in tactics
Referring physicians	LOW referrals influence patient flow	MODERATE training of nurses must meet care standards of common patients.	Monitor ; remain receptive for any remarks; react quick and openly if necessary
Patients and Families	MODERATE indirect (long-term): satisfaction, feedback	LOW care standards must be kept; no language barriers	Monitor communication; open strategy: established quality standards; remain receptive for remarks
Competitors	MODERATE competition for same pool of IQNs applicants	MODERATE strategic process might serve as example	Monitor to stay competitive
Regulatory Bodies (POR & GER)	HIGH enforcing compliance with labour laws, certifications, licenses	MODERATE ensuring ethical recruitment & foreign staff meet legal qualifications; prevent brain drain	Keep informed ; ensure compliance and proactive engagement
Nursing institutions	MODERATE provide consultation for nurses; may influence applicant pool and preconceptions	HIGH ensuring graduates' employment & career opportunities; prevent brain drain	Engage openly ; pro-active communication; signalise openness for collaboration; expect potential hostility
Internationally Qualified Nurses (IQNs)	HIGH Engagement in application & qualifying phase; feedback on recruitment process	HIGH securing employment and integrating into the clinic's culture while advancing their careers.	Engage closely ; personalised messaging, push EVPs, Whenever possible: communicate constant support KEY PLAYER

4.1.6 Benchmark Analysis: Recruitment of Philippine nurses

In 2021 *ARCUS* commissioned the international workforce management and recruitment agency *alfacare* with the recruitment of fully trained nurses from the Philippines. According to their website, *alfacare* is a globally operating labour recruitment agency specialised in the recruitment of healthcare workers from several Asian countries to Germany. Further, they differ from the majority of recruitment agencies in the healthcare market by offering an “innovative holistic approach”, which includes integration initiatives to support long term retention.

- Project launch: 1st quarter 2022
- Contractually agreed number of nurses to be recruited until 4th quarter of 2023: 10
- Actual number of nurses arrived at *ARCUS* as of 3rd quarter 2024: 8
- Lengthy selection process. After the selection was made, long waiting time until B1 exam was passed and a visa for entering Germany was granted.
- Only two candidates arrived with language level B2, despite contractual agreement.
- As a result, onboarding and full workplace integration was severely slowed down

Realisation

Internal evaluations by the HR management at *ARCUS* regarding the recruitment and integration process of Philippine nurses allow several conclusions. A few exemplary statements are listed below, followed by a preliminary benchmark comparison between the Philippines and Portugal as countries of origin (Table 11).

“The integration procedure is very lengthy, presumably integration and recognition within the EU is easier. Exemplary: *alfacare* is now also expanding into other countries, as recruitment process in the Philippines is very complex and not sufficient by itself.”

“Furthermore, the personalities of the Philippine forces are very pleasant and positive, which makes it easier to integrate them quickly.”

“Another positive aspect is that we have opted for several specialists from one country of origin, which revealed that working together makes it easy to feel at ease and to arrive in Germany. However, less of them have arrived yet than we planned for.”

Benchmark IQN	Philippines	Portugal
Approach	Through third party	Direct
Recruitment cost per hire	ca. 12,000.- EUR	< 8,000.-EUR (est.)
Time hire-to-arrival	0.5–1 year	1–1.5 years (est.)
Contract length	Minimum 4 years	2–4 years
Retention rate	<i>(To be evaluated)</i>	<i>(To be evaluated)</i>
Proof of skills & qualification process effort	High	Low
Onboarding & job integration process effort	Low	<i>(To be evaluated)</i>
Social acclimatisation & relocation process	Moderate – High	Low –Moderate
Patient satisfaction (survey)	<i>(To be evaluated)</i>	<i>(To be evaluated)</i>
Coworker satisfaction (survey)	<i>(To be evaluated)</i>	<i>(To be evaluated)</i>

Table 11

As both endeavours are still ongoing, several fields in the Benchmark analysis are temporarily left empty. Throughout both processes these fields must be filled and evaluated consistently to allow a full analysis. However, several direct advantages of recruiting from Portugal are highlighted. It is also apparent that a recruitment agency used in the Philippine case is not advised for the Portuguese recruitment effort – mainly because of a simplified “Proof of skills & qualification process effort” and low-moderate “Social acclimatisation & relocation process”, as well as the decreased cost per hire.

4.2 Implementation phase

4.2.1 Ambition statement (external)

An ambitious organisational mindset constitutes constant commitment to improve and to achieve set goals, whilst inspiring others. To do so, the core tasks and the objectives have to be well articulated on how to achieve them, with whom and which resources are needed.

The ambition is to set a new benchmark in international collaboration within the German healthcare sector, thinking beyond traditional boundaries. We aspire to be the **employer of choice** for young Portuguese nurses seeking international experience and **professional growth**.

By offering comprehensive professional development programs and **integration support**, we aim to attract driven nursing professionals from Portugal for **“medium-term”** employment contracts (2–4 years).

By enhancing our recruitment and talent management efforts we aim to **become a leading example of international collaboration** in the German healthcare sector.

4.2.2 Rationale statement (internal)

In an increasingly competitive healthcare landscape, recruiting foreign personnel is essential for maintaining and enhancing the quality and capacity of services at our clinic. The ongoing shortage of nurses in Germany threatens the ability of clinics to deliver timely and high-quality care. By sourcing skilled professionals from abroad, we can ensure our clinic continues to operate at full capacity, reducing workload and patient wait times.

In today’s medical environment, where both patients and professionals seek excellence and cultural competence, recruiting internationally is no longer just an option – it is a strategic necessity for staying competitive in a globalising healthcare market. As part of our Strategic Communication Plan, we will introduce a “medium-term” employment cycle of young Portuguese nurses. Nurse education in Portugal is renowned for its high-quality standards and actually surpasses the German nurse training in terms of hands-on experience in early education stages. Strongly believing in the European benefits of labour migration and cooperation

As a fundamental prerequisite, only those applicants with sufficient education and work-experience levels according to German standards will be offered a provisional contract. Before joining the teams, all recruits will be assessed in their German language proficiency and their

documentation checked. Only when all quality evaluations are successfully completed, the recruits will start the onboarding programme and will later be integrated in the work schedules.

We are confident the future co-workers from Portugal will contribute to the success of *ARCUS* and will become well-regarded members in their teams. Management and team leaders must support the inclusion of the Portuguese colleagues to the best of their abilities. The following chart provides an overview of the process Portuguese recruits undergo, starting from their pre-decision to migrate up to their onboarding at ARCUS. [4.4.2 Timeline](#) highlights potential barriers and complicating factors (Figure 1).

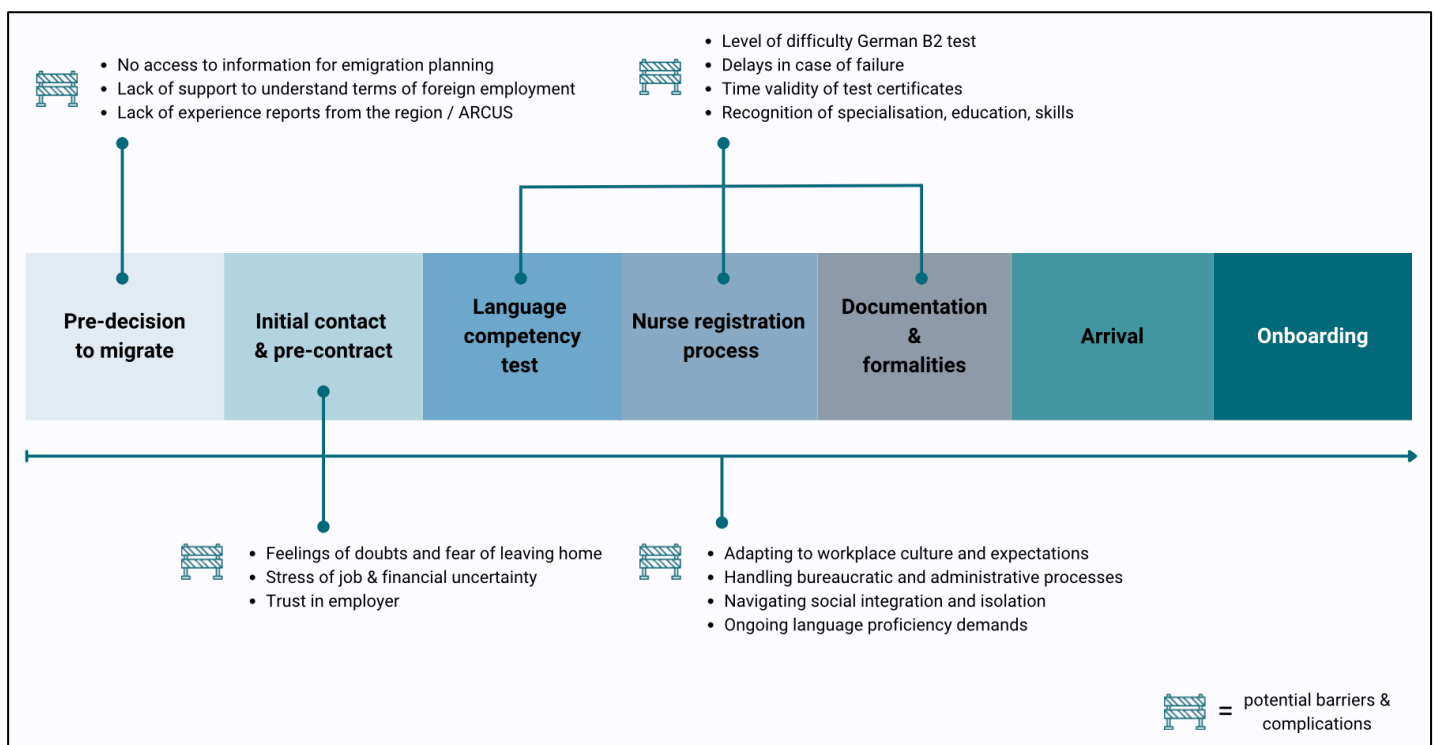
4.2.3 Objectives

The goal of the strategic communication plan is to recruit Portuguese nurses. For the achievement the plan follows four objectives. In order to carry out strategic communication for *ARCUS*, the organisation must provide a basis for the strategic communication process, particularly for the specific goal. The development of the objectives followed the SMART principle (Specific, Measurable, Achievable; Relevant, Time-bound).

- 1) Introduce a strategic communication infrastructure at *ARCUS*
- 2) Increase accessibility for international healthcare professionals to a career at *ARCUS*
- 3) Increase knowledge about work and education programmes at *ARCUS* amongst Portuguese nursing students between the ages 18-28
- 4) Ensure a smooth recruitment process from initial contact until arrival by minding potential barriers, following the tactical actions and engaging at touchpoints

4.2.4 Timeline

Following the inside-out approach and the focus on tailored messaging tactics, the individual applicant process is to be outlined before setting definitive dates and time boundaries for the organisation (see figure 9). Furthermore, as the demand for healthcare personnel is continuously high, the recruitment efforts (of domestic and international workforce) are



permanently ongoing. Therefore, the timeline for the strategic communication plan is following an agile, consistent approach, which focuses on continuous planning and execution.

In figure 10 the timeline has been modified with the specific tactical actions (employer branding, message dissemination, career transition support, relocation support). Also, the key touchpoints within the recruitment process where individual interviews are recommended to be conducted are highlighted in yellow.

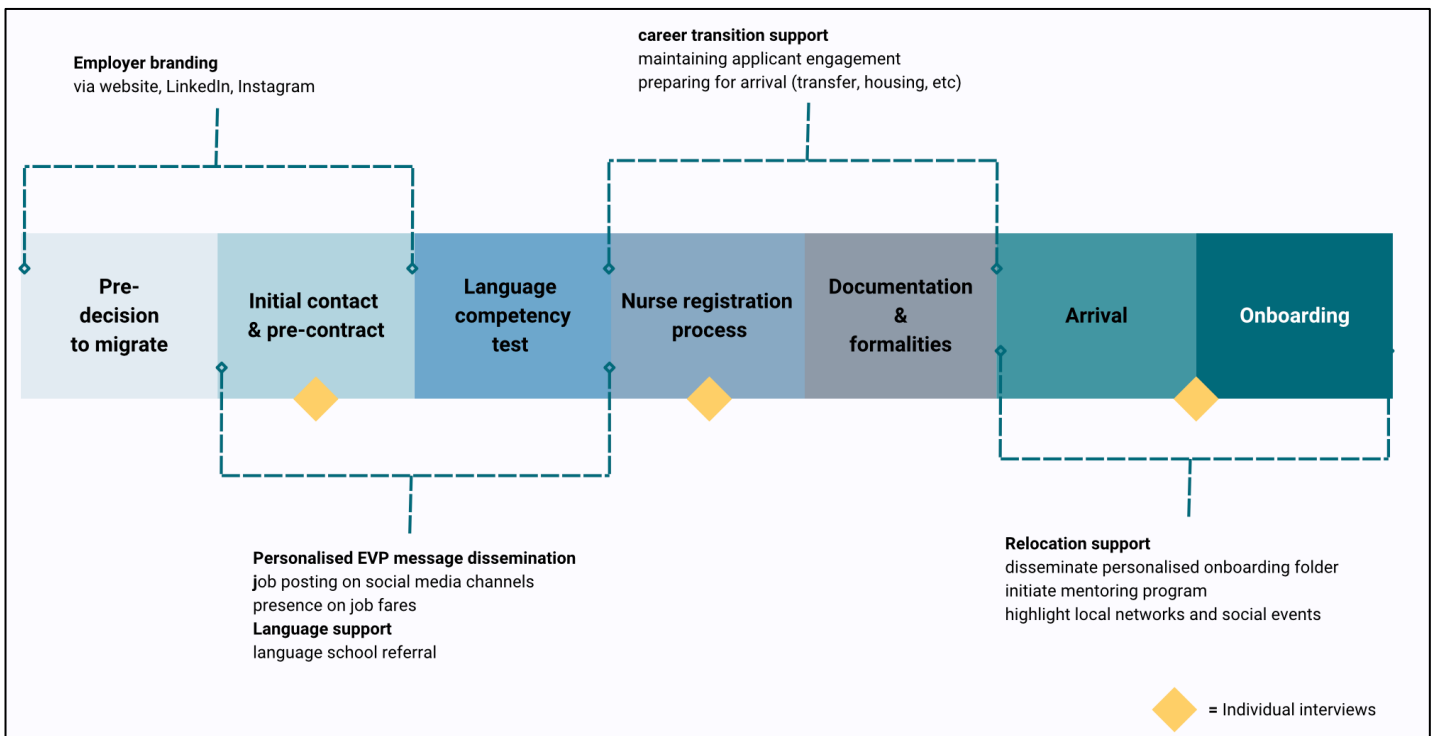


Figure 10

4.2.5 Planning Matrix

The objectives together with the according strategy, broad tactics, target audience and timeline allocation have been summarised in the following planning matrix (see table 11).

No.	Objective	Strategy	Tactics	Target Audience	Timeline
1)	Introduce a strategic communication infrastructure at ARCUS	Foster awareness for strategic communication inside the organisation Form the organisational basis for a holistic approach	- create and implement new Mission, Vision, Values statements - Develop internal communication channels & training programs for staff - Internal newsletters & email updates - Feedback system for two-way communication - Create an agile strategic communication slide	ARCUS management, HR, Marketing, Nurse-managers, Onboarding-Team	December 2024 – February 2025
2)	Increase accessibility for international healthcare professionals to a career at ARCUS	Launch a cross-channel integrated employer branding campaign	- Relaunch website (recruitment components; multi-lingual: ger, eng, port) - Define localised EVP - Launch digital marketing campaigns (Instagram, LinkedIn) & measure usage habits - Highlight employee benefits through testimonials - Create bilingual materials (brochures, webinars)	Healthcare professionals across Europe (focus: Portugal)	Starting January 2025
3)	Increase knowledge about work and education programmes at ARCUS amongst Portuguese nursing students	Run targeted educational outreach campaigns in Portuguese nursing schools Communicate EVPs to the target group via social media	- Attend healthcare fairs in Portugal - Collaborate with nursing schools for seminars & placements - Partner with influencers & professional bodies for digital promotion - Monitor recruitment leads from campaigns (SEO) - Personal follow-up with potential applicants via phone and email - Offer application guidance and support (e.g. webinars on the application process)	Portuguese nursing students/ professionals aged 18-28	Starting January 2025 First evaluation: June 2025
4)	Ensure smooth recruitment process from initial contact until arrival	Constant interpersonal communication; Portuguese contact person	- individual interviews - Language & documentation support (before arrival): language school referral, proof of qualification forms - Immigration support throughout process - Relocation support: transfer, housing, continued language training, personalised onboarding and mentorship programs	All Portuguese nursing applicants	Starting January 2025 First evaluation: August 2025

Table 11

4.2.6 Employer branding

The career area on the *ARCUS* website looks as follows. Not available in any other language than German, it consists out of the chapters (translated) “Team”, “Leadership”, “Career”, “Challenge”, “Family”, and “Diversity”. Although they are already in the broadest sense in coherence with the organisational “Vision, Mission, Values”, the existing statements must be translated correctly and improved in their applicability towards internationally qualified personnel, following a human-centred design approach. The ‘Improved new versions’ serve as a basis for further message tactics beyond the website, across various platforms including social media (e.g. *Instagram*, *LinkedIn*). Therefore, message development for cross-channel employer branding, e.g. within the Marketing Department or HR, may use the following messages as guidelines.

“Team”

Translated original

‘You can only achieve good results as a team’

We live and breathe teamwork - the advantages of a high-performance team are particularly evident in our tight processes. Everyone is important in their own place and knows what is important. Our doctors work in teams of specialists to offer patients the best possible treatment. For example, second opinions on further treatment can be obtained and the next steps discussed together. This ensures a high level of treatment success and the quality of our work - and the patient feels this too.

Improved new version

At our clinic, we **live and breathe teamwork**, especially given our structured and streamlined workflows, where the strengths of a powerful team shine through. Each individual plays a crucial role and understands what matters most. By incorporating international professionals into our teams, we further enhance the **diversity and expertise** within our specialised medical groups, allowing for a broader range of perspectives and solutions. We follow a **collaborative approach** which assures a high success rate in treatments and solidifies the quality of our work – something our patients experience firsthand.

“Leadership”

Translated original

‘For us, loyalty means treating each other responsibly and respectfully.’

Managers act as role models and encourage employee commitment through a cooperative management style.

Improved version

All team-leaders serve as role models and foster employee engagement through a **cooperative leadership style**. We believe that this applies especially to our international employees, who shall be encouraged to bring in their diverse perspectives. A flat hierarchy means we highly value **open communication and constructive criticism** – throughout all departments.

“Career”

Translated original

‘Trust in my sense of responsibility and the recognition of my qualifications drive me to perform at my best.’

Highly talented employees are prepared early for their future roles and receive individualized career planning tailored to their skills and qualifications. This approach allows us to harness the potential of our emerging talent and actively foster the development of our young professionals.

Improved version

‘Being entrusted with responsibility and having my international qualifications recognized motivate me to perform at my best.’

We are committed to supporting internationally qualified medical personnel through **specialised education and career development programs**. By offering individualised career paths tailored to their unique skills, we prepare these talented professionals early for their aspired future roles.

“Challenge”

Translated original

‘The varied and interesting working environment at the ARCUS clinics is what makes my job special every day’

The networking of different areas offers a varied working environment in which cross-departmental knowledge can be utilised flexibly. The daily work is constantly seen as a challenge and should be mastered through individual competences or teamwork in order to turn every problem into an opportunity.

Improved new version

‘The stimulating professional environment at the ARCUS makes my job special every day’
The synergy among departments offers a dynamic workplace where cross-functional knowledge can be flexibly applied. We continually embrace daily tasks as challenges to be overcome through individual expertise or collaborative teamwork, **turning every problem into an opportunity for growth.** This includes the **joint support for our international colleagues** in overcoming language barriers and adjustment in their new surroundings.

“Family”

Translated original

‘Here, I can truly balance family and career.’

‘The little ones are of great importance to us.’ Thanks to the daycare center opened in November 2013, we can ensure childcare places for children aged 1 to 4 years. This offers parents the ideal opportunity to reconcile work and family life. We also provide flexible solutions tailored to the needs of parents to create a good "work-life balance." Family friendliness is an essential component of our company to prevent the turnover of valued employees and to offer good working conditions.

Improved new version

‘At ARCUS I can truly balance family and career’

Family and work-life balance matters greatly at ARCUS. Providing a large daycare and kindergarten since 2013, we are offering flexible solutions to reconcile work and family life. As a family-run organisation, **we take pride in having multiple generations of families working together within our workforce.**

“Diversity”

Translated Original

‘We benefit from employees who contribute their own experiences and perspectives.’

Employees with migration backgrounds, of different ages and genders: It is not the ethnic or social background that makes a valued employee but their willingness and motivation to give their best for our patients every day and to integrate into the work process. We rely on diversity to advance creativity and intercultural understanding in our clinic.

Improved new version

‘We greatly benefit from employees who contribute their unique experiences and perspectives.’

Our success at ARCUS is rooted in our diversity. We value employees from all walks of life – those with migration backgrounds, of varying ages, genders, and cultures. A cherished employee isn't defined by their ethnic or social background but by their dedication to provide the best care for our patients and integrating into our team.

4.2.7 Employee Value Proposition

The EVPs tailored for the target group (Portuguese nurses and nursing students between the ages 18–28) and developed following the AIDA method (Attention, Interest, Desire, Action). The messaging is focused on the three themes “development & growth”, “connection & community”, “meaning & purpose”.

Short version

Elevate Your Nursing Career at ARCUS

Are you a young nursing professional seeking to advance your professional journey?

At ARCUS we offer a unique environment **where your skills are recognized, your growth is nurtured, and your career aspirations are realised.**

Feel free to contact us directly on LinkedIn, Instagram or via our website! Together we will identify the perfect career options according for you!

Medium version

Take the First Step toward an exciting Career Journey!

Don't miss this opportunity to advance your nursing career internationally at one of Europe's leading clinics for orthopaedics and sports medicine. Apply now to become a vital part of the ARCUS Clinics' dedicated team.

What we offer

- Personalised career pathways: scholarships, specialisation, vocational training, etc
- Paid language courses and immigration support
- Guaranteed permanent employment: short- & long-term! (minimum 2 years)
- Excellent work environment; healthcare plans; free accommodation
- Top salaries in the industry

Empower Your Nursing Career with ARCUS !

At ARCUS, we believe in investing in our people to create a brighter future for healthcare. As a nursing professional, you bring passion, dedication, and a commitment to care – and we want to help you elevate those qualities into a fulfilling and impactful career.

Why Join ARCUS Clinics?

1. Scholarship and Education Opportunities

We offer tailored scholarships for Portuguese nurses, enabling you to further your education while minimizing financial burdens. Take advantage of fully funded programs like Nurse Management, Advanced Clinical Practice, or Specialised Orthopedic Nursing, equipping you with the skills and expertise needed to lead in modern healthcare.

2. International Exposure and Professional Development

As part of one of Germany's most renowned orthopedic and sports medicine clinics, you'll gain unparalleled exposure to cutting-edge medical technologies, multidisciplinary teamwork, and international best practices. Our dedicated mentorship programs will guide you every step of the way.

3. Flexible Career Pathways

At ARCUS your ambitions shape your journey. Whether you aspire to manage a healthcare team, specialize in advanced nursing techniques, or contribute to research, our tailored career pathways are designed to help you achieve your goals.

4. Language and Integration Support

Moving to a new country can be challenging, but we've got you covered. Our comprehensive integration program includes German language courses, cultural adaptation workshops, and personal support to help you thrive in your new environment.

5. Work-Life Balance and Community

ARCUS Clinics is more than a workplace; it's a family. Enjoy a supportive work environment, flexible schedules, and community-building activities to ensure a healthy balance between your personal and professional life. As

How We Empower You:

- Education First: Scholarships covering tuition for advanced nursing programs like Nurse Management, alongside ongoing professional training.
- Supportive Onboarding: Personalised orientation programs to ease your transition into the German healthcare system.
- Career Progression: A clear and achievable path to more responsibilities and leadership roles.

Join Us and Lead the Future of Healthcare

If you are a Portuguese nursing student eager to take your career to the next level, ARCUS Clinics is the perfect place to begin. Together, we'll redefine excellence in healthcare and make a lasting difference in the lives of patients worldwide.

Empower your future with ARCUS Clinics – where your growth and aspirations are at the heart of what we do.

Apply today to begin your journey with us!

These three formulated recruitment message examples shall serve as templates for further detailed and tailored EVPs as part of recruitment campaigns. The themes “development & growth”, “connection & community”, “meaning & purpose” may be developed in further detail.

5. Conclusion

As a topic that stretches across macro, meso and micro level, the recruitment of nurses as a trending subject in global healthcare must be analysed from a broad perspective. However, from an organisational standpoint, the recruitment should also incorporate the perspectives of the concerned individuals (in this project of young Portuguese nurses). This project set out to investigate current research on migration of health care professionals and retention/recruitment policies together with socio-political situations in the countries of Germany and Portugal.

The included study proposes the utilisation of strategic communication in addressing the global nursing shortage by facilitating cross-border recruitment and ensuring seamless integration of international healthcare professionals. Hence, there were two research objects: the Portuguese nurses and nursing students, and the *ARCUS Clinics*. Through a comprehensive analysis of the *ARCUS Clinics'* organisational situation, stakeholder dynamics, and communication strategies on the one hand – and the working and education conditions of Portuguese nurses on the other – this project provides actionable recommendations for a targeted recruitment strategy. Central to this approach is the focus on employer branding and the employee value propositions which include the creation of a supportive employer/employee relationship that emphasizes education, specialisation, and long-term career development for internationally qualified nurses.

As an exceptional case of successful management in the German hospital and clinic landscape, the EVPs *ARCUS* is able to offer as a part of the strategic communication initiative may not be possible for the average hospital/clinic to match. However, as strategic communication must generally be fitted to the respective organisation by principle, several universal take-aways remain. The question of how to approach strategic communication “planning” (if one accepts the terminology) is vital to the whole process and the outcome. As shown, a holistically agile approach seems necessary when facing cross-border recruitment and employer branding challenges within a healthcare setting. Alignment between management directives, stakeholder relationships, communication objectives and strategies ensures a healthy process whilst giving space for short-term adaption.

Involving migrant nurses as active research partners is vital for creating successful, ethical, and sustainable migration policies. Expanding the evidence base on their perspectives and educational support needs will help develop more effective and ethical immigration policies (Smith et al., 2022). Regarding strategic communication theory, in application, strategic

communication approaches must become more distinct. Processes should be clarified and categorised in regard to their extent and goal. This starts with agreeing on clearly defined, distinct terms. Distinction should also be strengthened towards related fields (e.g. strategic management, etc). Strategic communication must be defined by its perspective on complex problems and holistic approach on creating long-term solutions. Using open communication to attain the organisations' goal is the underlying conception and was followed throughout this project. However, practical implementation proved to be challenging in a healthcare setting in regard to the various established approaches to strategic communication.

The development of the final project saw several limitations. Up and foremost, the mentioned lack of previously conceptualised approaches to strategic communication actions in the hospital environment forced the development of the Strategic Communication Plan to be arguably vague. Concepts were mostly derived from strategic communication theory, often with no direct connection to or exemplary use neither in healthcare settings nor recruitment efforts. This led to the project being a product of applicable elements from theory and the beforehand existing content from the organisation. It would be advised to fully analyse and restructure (if necessary) the whole communication process in regard to employer branding and recruitment. However, this would require more resources and full access to internal data of the organisation.

In general,

6. Future prospects

One learning from discussing the migration of healthcare professionals across Europe is that health workers must not be treated like a strictly domestic resource within the healthcare system. Alike highly skilled professionals in other sectors within the EU, nurses and other critical personnel are free to move wherever they want – as much as they are free to give up their profession completely. The demand for nurses must be considered in legislative decision making, however instead of focusing on restraint, the authorities should focus on empowerment and professional perspectives. This means that nurses on the job market should be perceived as individuals with the freedom to choose the best employment offer. Rather than creating a prohibitive environment with de facto forced retention, the national healthcare systems should adapt to unavoidable global flows of work migration, as well as flexible employment methods including foreign personnel and those coming back from foreign employments.

Concluding the mentioned findings of the various studies on nursing in Portugal, the fundamental reason for nurse staffing shortages in the Portuguese health system is not foreign recruitment. Ultimately, it is the outdated system which undervalues the work and the individual potential of nurses as well as the general capabilities of the nursing workforce. The number of Portuguese nurses giving up the profession completely due to burnout alone, underlines the severity of the structural problem in comparison with foreign recruitment. Although labour emigration is to be recognised as a factor and significant indicator for sentiments in the nursing workforce, it is the root causes which must be fought, not the symptoms.

Contrary to the contemporary practice of nurse recruitment in Portugal by foreign organisations, offering nurses flexible work models with a focus on vocational training for professional development of their careers could turn a “brain drain” into a “brain circulation”. Options to follow this approach range from enhancing nurse management roles, over field-specialisations, up to job sharing work models. Another opportunity to expand the role of nurses in the Portuguese healthcare system is the introduction of Physician Assistant (PA). Already successfully implemented in countries such as the USA, Great Britain and the Netherlands, the professional path offers a range of benefits in relieving the system. As demonstrated by the mentioned examples from Germany, the introduction of PA courses promotes job satisfaction amongst health workers. Although it may take years to fully establish a new professional group in the medical spectrum and hospital workforce management, the long-term benefits are evidently significant.

Following the analysis of both healthcare sectors, specifically the working situation for nurses in Portugal, and in regard of recent international studies, it may be concluded that Portuguese nurses and the Portuguese healthcare system could significantly benefit from work experience in Germany due to several key factors. Firstly, Germany offers a highly advanced and well-structured healthcare system with the necessary resources to provide top-level working conditions and various options for professional development. Exposure to this environment allows Portuguese nurses to gain valuable insights into best practices, advanced medical technologies, and patient management strategies that are essential for enhancing their professional competencies. The German system is allowing these insights as it, opposed to the Portuguese system, promotes a variety of expanded nursing roles. This experience can lead to improved clinical skills, greater proficiency in utilizing state-of-the-art medical equipment, and a deeper understanding of effective healthcare delivery models, which may be implemented in Portugal in the future.

Furthermore, vocational training and career development opportunities in Germany are robust and comprehensive. Although the German language presents a barrier for Portuguese speaking nurses, the dual nurse education system is similar to the Portuguese. German healthcare institutions often provide structured language training programs, continuous professional development courses, and opportunities for specialization in various fields of nursing. By participating in these programs, Portuguese nurses can expand their expertise, acquire new qualifications, and stay abreast of the latest advancements in medical science and nursing practice. This, in turn, enhances their employability and career prospects, both within Portugal and internationally. Additionally, the experience gained in Germany can foster a culture of continuous learning and improvement among Portuguese nurses, encouraging them to pursue further education and specialisation.

The broader Portuguese healthcare system also stands to gain from this exchange of knowledge and skills. Nurses returning from Germany can introduce innovative practices and efficient healthcare delivery methods, potentially leading to systemic improvements. They can serve as catalysts for change, advocating for the adoption of advanced technologies and protocols that enhance patient care and operational efficiency. Moreover, these nurses can play a crucial role in training and mentoring their peers, disseminating the knowledge and skills acquired abroad, and fostering a collaborative learning environment. This cross-pollination of expertise can drive the overall development of the Portuguese healthcare system, making it more resilient, adaptive, and capable of meeting contemporary healthcare challenges.

In summary, work experience in Germany offers Portuguese nurses a unique opportunity to enhance their clinical skills, expand their professional knowledge, and advance their careers. The Portuguese healthcare system, in turn, benefits from the infusion of advanced practices and innovations, ultimately leading to improved patient care and operational efficiency. This symbiotic relationship highlights the importance of international collaboration and professional mobility in the healthcare sector.

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8. Appendix A: Online survey

Project survey: Young nurses in Portugal

Dear Participant,

You are invited to take part in a research study conducted as part of a master thesis from the Human Sciences Faculty of the Universidade Católica Portuguesa. This questionnaire is a crucial component of a project study designed to explore the phenomenon of work migration amongst nursing students and recently graduated nursing students in Portugal. Your participation in this study is entirely voluntary, and your responses will be anonymous and confidential.

The survey will take 3–5 minutes of your time.

Purpose of the Study: The primary aim of this study is to investigate the factors influencing nurse migration and the decision to work abroad as a nurse educated in Portugal. By understanding the motivations, challenges, experiences, and ambitions of nursing students in Portugal regarding emigration, we hope to contribute valuable insights to this highly relevant phenomenon.

Study Design: This study adheres to the ethical principles outlined in the Belmont Report, ensuring that all aspects of the research respect the dignity, rights, and welfare of participants. Your participation will involve completing a questionnaire that assesses various aspects related to nurse migration, including motivations, intentions, experiences, and perceptions.

Target Group: We are especially reaching out to current nursing students in Portugal and nurses which left a Portuguese nursing school less than three years ago. Your unique perspectives and experiences are essential for a comprehensive understanding of the dynamics surrounding nurse migration in this demographic.

Confidentiality and Privacy: Your responses will remain strictly confidential, and your identity will not be disclosed in any research outputs. The data collected will be used for academic research purpose and will be reported only in aggregate form to ensure anonymity.

Voluntary Participation: Participation in this study is entirely voluntary. You have the right to withdraw from the study at any time without penalty or consequence. Your decision to participate or not will not affect your academic standing, employment status, or any other aspect of your relationship with Universidade Católica Portuguesa or other institutions.

We sincerely appreciate your willingness to contribute to this research endeavour. **Your insights will be invaluable in advancing our understanding of nurse migration and informing future strategies to support the nursing workforce.**

Thank you for your participation.

Personal contact

My name is Julius Ellermann, I study at the Universidade Católica Portuguesa Lisboa, and you can reach out to me at any time under the following email address: s-jellermann@ucp.pt

Form of consent * *mark* *.

- I understood the information above and I voluntarily agree to participate in this study
- Student email address (voluntary): _____

Studying nursing at a university

Using the scale below, indicate to what extent each of the following statements corresponds to the reasons **why you study nursing at university**.

- 1) "Because without a university degree I would not find a high-paying job later on."

does not correspond at all ○ ○ ○ ○ ○ ○ ○ corresponds exactly

- 2) "Because I experience pleasure and satisfaction while learning new things."

does not correspond at all ○ ○ ○ ○ ○ ○ ○ corresponds exactly

- 3) "Because I think that a university education will help me better prepare for the career I hav chosen."

does not correspond at all ○ ○ ○ ○ ○ ○ ○ corresponds exactly

- 4) "For the pleasure that I experience when I read interesting studies or articles."

does not correspond at all ○ ○ ○ ○ ○ ○ ○ corresponds exactly

- 5) "Honestly, I don't know; I really feel that I am wasting my time in university."

does not correspond at all corresponds exactly

- 6) "For the satisfaction I feel when I am in the process of accomplishing difficult academic activities."

does not correspond at all corresponds exactly

- 7) "To prove to myself that I am capable of completing my college degree."

does not correspond at all corresponds exactly

- 8) "In order to obtain a more prestigious job later on."

does not correspond at all corresponds exactly

- 9) "For the pleasure I experience when I discover new things never seen before."

does not correspond at all corresponds exactly

- 10) "Because eventually it will enable me to enter the job market in a field that I like."

does not correspond at all corresponds exactly

- 11) "I once had good reasons for going to nursing school; however, now I wonder whether I should continue."

does not correspond at all corresponds exactly

- 12) "Because university allows me to experience a personal satisfaction in my quest for excellence in my studies."

does not correspond at all corresponds exactly

- 13) "For the "high" feeling that I experience while reading about various interesting subjects."

does not correspond at all corresponds exactly

14) "Because of the fact that when I succeed in college I feel important."

does not correspond at all O O O O O O O corresponds exactly

Stage in nursing education

15) In which degree are you currently enrolled? (if you are not currently enrolled, state your degree)

- Bachelor's/Undergraduate
- Master's/(Post-)Graduate
- PhD/Doctorate

16) Are you currently / would you be interested in studying the master course "nurse management"?

- Yes
- No
- Maybe, I don't know yet

17) Are you currently considering in working abroad?

- Yes
- No, but I am interested
- No, I do not want to work outside of my home country *continue with question 30)*

18) What factors influence your decision to consider working abroad?

Please select all options that apply

- Better career opportunities
- Higher salaries
- Advanced education/research opportunities
- Quality of life
- Having friends/family working in the destination country
- Other: _____

19) Please select the destinations you would consider migrating to

Multiple answers possible

- Angola / Mozambique / Cap Verde (PALOP)
- Brazil
- France
- Germany
- Netherlands / Luxembourg / Belgium (BENELUX)
- Norway / Sweden / Finland
- Spain
- Switzerland
- United Kingdom / Ireland
- United States / Canada

20) Would you like to eventually return to Portugal ?

- Yes
- No

Working abroad: reasons and conditions

Please rate the following statements according to your personal opinion:

21) "A significantly higher salary is the only reason why I would consider working abroad."

does not correspond at all O O O O O O O corresponds exactly

22) "A scholarship for a master's degree at a university abroad is something I would be interested in."

does not correspond at all O O O O O O O corresponds exactly

23) "I am not willing to learn a language in order to work abroad."

does not correspond at all O O O O O O O corresponds exactly

24) "The offering of vocational training courses would influence me positively in my consideration."

does not correspond at all O O O O O O O corresponds exactly

25) "Paid and organised language courses would positively influence my choice of joining a hospital abroad."

does not correspond at all corresponds exactly

26) "The location (city) of my workplace is very important to me."

does not correspond at all corresponds exactly

27) "When working abroad I would not want to study simultaneously."

does not correspond at all corresponds exactly

28) "Working abroad is all about professional development, the salary and the location are secondary."

does not correspond at all corresponds exactly

29) "I don't see the benefits of receiving vocational training when working abroad."

does not correspond at all corresponds exactly

30) On which social media platform are you active and would like to receive international job offers?

Multiple answers possible

- Facebook
- Instagram
- LinkedIn
- TikTok
- YouTube
- Other

Demographic data

Last questions of the survey!

31) Gender

- Female
- Male
- Other

32) Age

- 18–21
- 22–24
- 25–27
- 28–30
- 31+

33) Marital status

- Single
- Married
- Other

34) Do you have children?

- Yes
- No

