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SPIS TREŚĆI

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Wprowadzenie

Na łamach periodyku naukowego PNAP przedstawiono prace naukowe poświęcone aktualnym problemom rozwoju gospodarki narodowej i światowej we współczesnych warunkach ekonomicznych oraz poruszono kwestie dotyczące funkcjonowania inwestycyjno-innowacyjnego gospodarki na poziomach makro i mikro, kwestie efektywności działalności gospodarczej i zarządzania antykryzysowego przedsiębiorstwami, ekonomii sieci, polityki naukowej, modelowania procesów aktualizacji techniczno-technologicznej bazy i konkurencyjności przedsiębiorstw przemysłowych ze względu na wyzwania globalizacji.

W tę problematykę wpisuje się PNAP - Periodyk Naukowy Akademii Polonijnej, skupiający ludzi nauki z różnych kontynentów, gdzie artykuły naukowe podejmują problematykę o charakterze historyczno-kulturowym, polityczno-prawnym, ekonomiczno-społecznym, edukacyjno-zdrowotną. W PNAP występuje także dział recenzji i omówieni oraz sprawozdań.

Zapraszam do współpracy przedstawicieli ośrodków naukowych, których brak w Radzie Naukowej, praktyków, nauczycieli naukowo-dydaktycznych, doktorantów, studentów, których publikacje w PNAP, dzięki punktacji Czasopism Naukowych MNiSW oraz posiadaniu prefiksu DOI, będą czytane i staną się przedmiotem dyskusji, debat i poznania innowacji naukowych poszukiwań.

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Andrii Shaikan

Introduction

The scientific journal PNAP presents research papers devoted to the urgent problems of national and world economy under current economic conditions. They address the issues of investment and innovation functioning of the economy at macro and micro levels, the issues of business efficiency and anti-crisis company management, network economy, science policy, process modelling to update the technical and technological base of industrial enterprises and increase competitiveness with due regard to globalization challenges.

PNAP - the Scientific Journal of Polonia University fits in these issues bringing together scientists from different continents, whose scientific articles address the issues from the following fields: history and culture, politics and law, economics and social science, education and health. PNAP also includes the review and discussion sections as well as a report section.

I invite You to cooperate with the representatives of research centers, whom the Scientific Council lacks in, practitioners, teachers, academics, Ph.D. candidates, students, whose publications in PNAP, thanks to the scoring system of the Ministry of Science and Higher Education and having the prefix DOI, will be read and will become the subject of discussions, debates and exploration of scientific innovations.

I thank the authors who have already established cooperation and those who will do so in terms of submission of their publications. I would also like to express particular gratitude to the members of the Scientific Council, who kindly accepted the invitation to work together and to contribute to the creation of PNAP.

Andrii Shaikan

PROBLEMS AND PROSPECTS OF DEVELOPMENT OF THE AUTOMOTIVE INDUSTRY IN UKRAINE

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Abstract. The article identifies major problems of the development of the automotive industry in Ukraine in 2010-2015, such as: catastrophic decrease of the production volume of cars, trucks and buses; reduction of the production capacity of automotive industry enterprises; loss of the competitiveness of the domestic automakers on the national automobiles market; increase of the dependence of automakers from borrowed funds; prevailing unprofitability of automakers and bankruptcy of some of them. Nowadays the only way to preserve the Ukrainian automotive industry is an active state protectionism of the development of the automotive industry as a strategically important sector of the national economy.

Keywords: automotive industry, automaker, automobiles market, mechanical engineering.

DOI: http://dx.doi.org/10.23856/2001

Introduction

Automotive industry is the important part of the mechanical engineering in Ukraine. According to the «Concept of the state target economic program of the passenger car industry development for the period until 2020» «…vehicle production in Ukraine provides the high level of the added value (over 70 percent), generates the demand for goods and services of the related industries enterprises (production of metal, plastics, car windows, chemicals, etc.) and promotes the research activity. Creation of one workplace in enterprises of the automotive industry entails the creation of six workplaces in the related industries» (Concept of the state target economic program of the passenger car industry development for the period until 2020).

As the important part of the industry of Ukraine, the automotive industry is very sensitive to changes in the national economy development. According to the data of the State Statistics Service of Ukraine (Industrial production indices by activity for 2010-2012; Industrial production indices by activity for 2013-2015) the growth or reduction of the automotive production index occurred predominantly faster then the growth or reduction of the mechanical engineering production index and the industrial production index.

Based on the above referred data, the purpose of the article is detection of the problems and prospects of development of the automotive industry in Ukraine.

The research methodology is method of analysis and synthesis, systematic approach, methods of the economic analysis.

The information base of research is the statistical data the Ukrainian motor vehicle manufacturers association «UkrAvtoprom» and Agency for infrastructure development of the stock market in Ukraine «SMIDA». Retrospective research period is 2010-2015 years.

Analysis of the trends and patterns of development of the automotive industry in Ukraine

Nowadays the automotive industry in Ukraine is represented by the limited number of producers.

Detailed description of the leading automakers in Ukraine is represented in Table 1.

Table 1

Description of the leading automakers in Ukraine*

Auto makers	***Location***	***Brands***	***Description of business***
JSC «ZAZ»	Zaporizhia city	ZAZ, Lanos, Sens, Forza, I-Van	the only enterprise in Ukraine, which has the complete cycle of passenger cars' production, including stamping, welding, painting, trimming the bodies and assembling the vehicles. The production is oriented mainly on the consumers of class C cars. Fruitful cooperation: Adam Opel, Daimler AG, GM DAT, VAZ, TATA, Chery, KIA. JSC "ZAZ" is included into "UkrAVTO" group of companies (*JSC «ZAZ». About company*)
BOGDAN Corporation	Lutsk city, Cherkassy city	Bogdan	one of the most dynamic enterprises in Ukraine, combines the capacity to produce buses and trolley buses, cars, trucks and commercial vehicles, and has its own extensive retail and service network. Partners: Hyundai, Subaru, Skoda, Citroen, Great Wall, Jac, Daewoo, Zotye (*BOGDAN Corporation. About Corporation*)
PrJSC «EUROCAR»	Solomonovo village Zakarpattya region	Skoda	official supplier of SKODA cars in Ukraine. Eurocar dealership network is one of the largest in Ukraine and recognized as the best in Europe in the sphere of service network organization and the level of equipment in cars maintenance stations. Capacity of Eurocar plant is full of number of technological innovations, with the flexibility of the production process, in a unique for Ukraine's technical solutions. Current Eurocar plant produces a complete range of SKODA cars. Member of Atoll Holding Group (*SKODA in Solomonovo. About company*)
JSC PA «KrASZ»	Kremenchug city Poltava region	Ssang Yong, Geely, Great Wall	specializes in large-vehicle assembly, performing the pre-sale preparation, guarantee and postguarantee maintenance of vehicles. The capacity consists of two assembly workshops: department of the passenger cars assembly and department of the commercial vehicles assembly (*JSC PA «KrASZ». About company*)

Auto makers	*Location*	*Brands*	*Description of business*
PJSC «AutoKrAZ»	Kremenchug city Poltava region	KrAZ	one of the world's leading manufacturers of heavy-duty vehicles. The only truck manufacturer in Ukraine, which has a closed technological cycle of production. PJSC «AutoKrAZ» manufactures the wide range of the trucks and spare parts for them, trailers and semitrailers. Member of the financial-industrial group «Finance and Credit» (*PJSC «AutoKrAZ». History*)
PJSC «BAZ»	Proliski village Kyiv region	Etalon, Baz	enterprise of the design and manufacture of vehicles. Main partners: «TATA Motors LTD» (India), Ashok Leyland (India), «FAW» (China), «Deutz AG» (Germany), «Hino Motors» (Japan), «ZF Friedrichshafen AG» (Germany), «DANA Spicer» (USA). Member of Etalon Corporation (*PJSC «BAZ». About company*)
PJSC «Chasiv Yar buses plant»	Chasiv Yar city Donetsk region	Ruta	Was established in 1958. Over the years, the company was engaged in the capital repairs of the Gaz and ZIL automobiles, and production of the special vehicles. Since 1995, the main products of the plant were the small class buses. Different from the automobile assembling enterprise by the presence of such types of production – forging and pressing, welding, coloring, assembling (*PAT «Chasivoyars`ki avtobusy`». The history of "Ruta" models*)
PJSC «Chernihiv autoplant»	Chernihiv city	Etalon, Chaz, Baz	Was established in 2003. Produces urban, suburban and tourist buses, trolleybuses. The main products are the small class buses – «Dolphin», Chaz and Baz. Member of Etalon Corporation (*PJSC «Chernihiv autoplant». Official web-portal of Chernihiv city council*)
JSC «Cherkassy bus»	Cherkassy city	Ataman	Assignee of Cherkassy automobile repair plant. In 1999 the plant started the production of the city buses. During 1999-2006 years there was a comprehensive upgrading of production: building the new painting areas, fiber plant, welding shop; the reconstruction of the production facilities; gasification; purchasing the equipment (*JSC «Cherkassy bus». History*)

* compiled by the authors based on Official web-portal`s of JSC «ZAZ», BOGDAN Corporation, SKODA in Solomonovo, JSC PA «KrASZ», PJSC «AutoKrAZ», PJSC «BAZ», PAT «Chasivoyars`ki avtobusy`», PJSC «Chernihiv autoplant», JSC «Cherkassy bus».

The dynamics of the production volume of the cars, trucks and buses in Ukraine in 2010-2015 years are represented on Figures 1-3.

Unfortunately, now PJSC «LAZ» (Lviv bus plant) and LLC «Automobile plant «AntoRus»» are stopped the production activity (Figure 3 and Table 2).

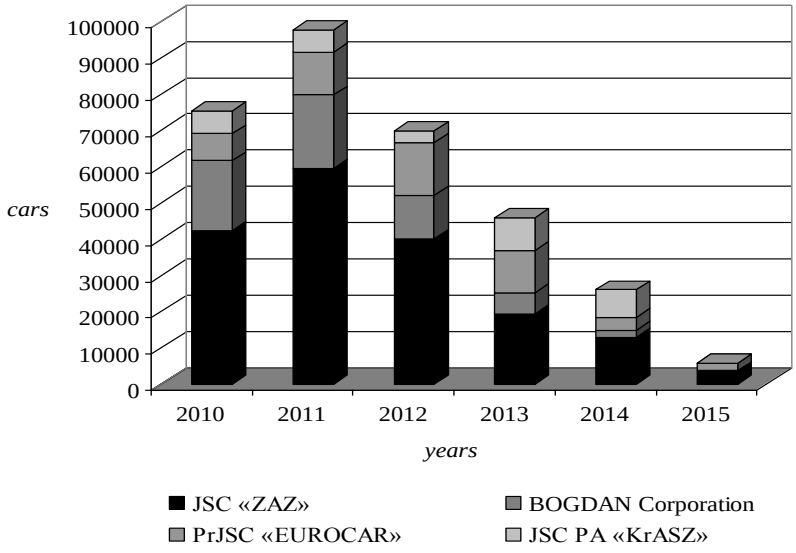

Fig. 1. Dynamics of the production volume of the cars in Ukraine in 2010-2015 years (constructed by the authors based on Statistics. Data file. Ukrainian motor vehicle manufacturers association «UkrAvtoprom», 2011, 2012, 2013, 2014, 2015)

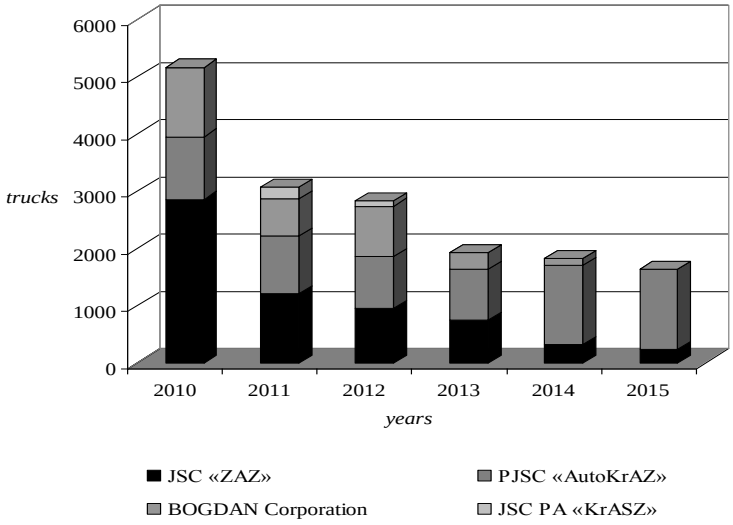

Fig. 2. Dynamics of the production volume of the trucks in Ukraine in 2010-2015 years (constructed by the authors based on Statistics. Data file. Ukrainian motor vehicle manufacturers association «UkrAvtoprom», 2011, 2012, 2013, 2014, 2015)

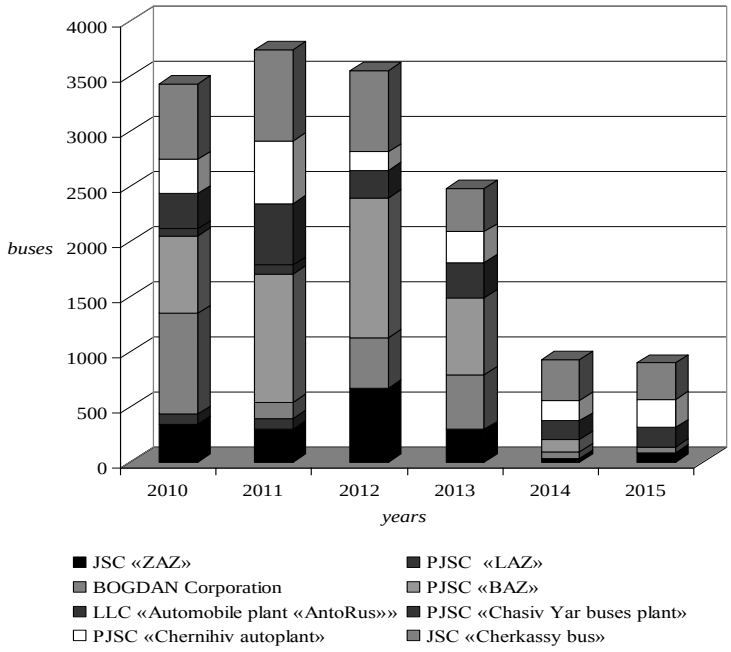

Fig. 3. Dynamics of the production volume of the buses in Ukraine in 2010-2015 years (constructed by the authors based on Statistics. Data file. Ukrainian motor vehicle manufacturers association «UkrAvtoprom», 2011, 2012, 2013, 2014, 2015)

Table 2

Breakdown structure of the automobile production by the leading automakers in Ukraine*

Automakers	Particles of the automotive industry output					
	2010	*2011*	*2012*	*2013*	*2014*	*2015*
cars						
JSC «ZAZ»	56,16	60,83	57,28	42,09	49,26	64,10
BOGDAN Corporation	25,50	20,74	17,27	13,01	7,71	0,00
PrJSC «EUROCAR»	9,92	11,94	20,89	25,12	14,07	35,90
JSC PA «KrASZ»	8,43	6,49	4,56	19,78	28,97	0,00
trucks						
JSC «ZAZ»	55,33	39,17	33,77	38,83	17,35	14,00
PJSC «AutoKrAZ»	21,16	33,17	31,79	46,38	75,97	85,64
BOGDAN Corporation	23,51	21,15	30,91	14,78	6,68	0,37
JSC PA «KrASZ»	0,00	6,52	3,53	0,00	0,00	0,00

Automakers	Particles of the automotive industry output					
	2010	*2011*	*2012*	*2013*	*2014*	*2015*
buses						
JSC «ZAZ»	10,05	7,98	18,88	12,00	3,34	9,34
PJSC «LAZ» (Lviv bus plant)	2,60	2,60	0,00	0,00	0,00	0,00
BOGDAN Corporation	26,71	3,85	12,84	20,04	6,89	6,01
PJSC «BAZ»	20,40	31,13	35,73	28,12	11,84	0,11
LLC «Automobile plant «AntoRus»»	1,93	2,25	0,03	0,00	0,00	0,00
PJSC «Chasiv Yar buses plant»	9,32	14,75	7,00	12,77	18,19	19,35
PJSC «Chernihiv autoplant»	9,06	15,28	4,77	11,35	19,91	28,25
JSC «Cherkassy bus»	19,93	22,16	20,75	15,72	39,83	36,93

* calculated by the authors based on Statistics. Data file. Ukrainian motor vehicle manufacturers association «UkrAvtoprom», 2011, 2012, 2013, 2014, 2015

As we see currently all Ukrainian automakers have problems in the business that gets reflected in the decrease of the automobiles production.

In the analyzed period Ukrainian automakers mostly lost their competitive position in the cars and trucks market (Table 3).

Table 3

Top-10 leaders in the automotive market in Ukraine during 2010-2014*

Places	Brands of automobiles				
	2011	*2012*	*2013*	*2014*	*2015*
cars					
1	Vaz (Russia)	Vaz (Russia)	Hyundai (South Korea)	Hyundai (South Korea)	Toyota (Japan)
2	Zaz (Ukraine)	Toyota (Japan)	Vaz (Russia)	Zaz (Ukraine)	Geely (China)
3	Hyundai (South Korea)	Hyundai (South Korea)	Zaz (Ukraine)	Geely (China)	Zaz (Ukraine)
4	Toyota (Japan)	Zaz (Ukraine)	Kia (South Korea)	Toyota (Japan)	Hyundai (South Korea)
5	Mitsubishi (Japan)	Renault (France)	Volkswagen (Germany)	Kia (South Korea)	Volkswagen (Germany)
6	Renault (France)	Skoda (Czech	Toyota (Japan)	Volkswagen (Germany)	Renault (France)

Places	Brands of automobiles				
	2011	*2012*	*2013*	*2014*	*2015*
		Republic)			
7	Chevrolet (USA)	Volkswagen (Germany)	Skoda (Czech Republic)	Skoda (Czech Republic)	Skoda (Czech Republic)
8	Ford (USA)	Nissan (Japan)	Renault (France)	Nissan (Japan)	Nissan (Japan)
9	Skoda (Czech Republic)	Ford (USA)	Nissan (Japan)	Renault (France)	Ford (USA)
10	Nissan (Japan)	Geely (China)	Geely (China)	Ford (USA)	Kia (South Korea)
trucks					
1	Gaz (Russia)	Volkswagen (Germany)	Gaz (Russia)	Fiat (Italy)	Volkswagen (Germany)
2	Volkswagen (Germany)	Gaz (Russia)	Fiat (Italy)	Volkswagen (Germany)	Fiat (Italy)
3	Fiat (Italy)	Renault (France)	Volkswagen (Germany)	Gaz (Russia)	Renault (France)
4	Zaz (Ukraine)	Fiat (Italy)	Renault (France)	Renault (France)	Gaz (Russia)
5	Renault (France)	Ford (USA)	Ford (USA)	Ford (USA)	Ford (USA)
6	Peugeot (France)	Citroen (France)	Peugeot (France)	Maz (Belarus)	Peugeot (France)
7	Ford (USA)	Peugeot (France)	Citroen (France)	Citroen (France)	Citroen (France)
8	Maz (Belarus)	Kamaz (Russia)	Kamaz (Russia)	Peugeot (France)	Zaz (Ukraine)
9	Mercedes-Benz (Germany)	Mercedes-Benz (Germany)	Mercedes-Benz (Germany)	Zaz (Ukraine)	Mercedes-Benz (Germany)
10	Jac (China)	Hyundai (South Korea)	Maz (Belarus)	Mercedes-Benz (Germany)	Maz (Belarus)
buses					
1	Baz (Ukraine)	Baz (Ukraine)	Baz (Ukraine)	Baz (Ukraine)	Peugeot (France)
2	Gaz (Russia)	Gaz (Russia)	Paz (Russia)	Paz (Russia)	Etalon (Ukraine)
3	Khaz (Ukraine)	Bogdan (Ukraine)	I-VAN (Ukraine)	Ruta (Ukraine)	Ataman (Ukraine)
4	Bogdan (Ukraine)	I-Van (Ukraine)	Gaz (Russia)	I-Van (Ukraine)	Ruta (Ukraine)
5	Paz	Ruta	Ruta	Gaz	I-Van

Places	Brands of automobiles				
	2011	*2012*	*2013*	*2014*	*2015*
	(Russia)	(Ukraine)	(Ukraine)	(Russia)	(Ukraine)
6	Laz (Ukraine)	Maz (Belarus)	Maz (Belarus)	Ataman (Ukraine)	Gaz (Russia)
7	Uaz (Russia)	Uaz (Russia)	Uaz (Russia)	Uaz (Russia)	Paz (Russia)
8	I-Van (Ukraine)	Paz (Russia)	Ataman (Ukraine)	Bogdan (Ukraine)	Bogdan (Ukraine)
9	Tur (China)	Khaz (Ukraine)	Bogdan (Ukraine)	Striy Auto (Ukraine)	Uaz (Russia)
10	Ruta (Ukraine)	Temsa (Ukraine)	Ford (USA)	Ford (USA)	Ford (USA)

* compiled by the author based on Statistics. Data file. Ukrainian motor vehicle manufacturers association «UkrAvtoprom», 2011, 2012, 2013, 2014, 2015

The data in Table 3 indicate the reorientation of the cars and trucks market in Ukraine from domestic automotive products to imported automotive products: cars – from Russia, South Korea, Japan, China, France, Germany, Czech Republic and USA; trucks – from Russia, Germany, Italy, France, USA, Belarus, China and South Korea.

This situation is caused by the internal problems in the economic activity of these enterprises.

In the Table 4 the main results of the comprehensive economic diagnosis (which includes the number of the key indicators such as the coefficient of depreciation of the capital assets, the assets turnover ratio, the coefficient of the equity capital, the financial stability ratio, the coefficient of independence from the borrowed funds, the absolute liquidity ratio, the operating profitability) of the leading automotive companies in Ukraine are presented.

Table 4

Main results of the comprehensive economic diagnosis of the leading automotive companies in Ukraine*

Automakers	Value of indicators					
	2010	2011	2012	2013	2014	2015
Coefficient of depreciation of the capital assets						
JSC «ZAZ»	0,26	0,28	0,29	0,35	0,48	0,66
BOGDAN Corporation	0,48	0,47	0,42	0,36	0,26	0,23
PrJSC «EUROCAR»	0,78	0,81	0,84	0,87	0,89	0,91
JSC PA «KrASZ»	0,70	0,71	0,74	0,77	0,79	no data
PJSC «AutoKrAZ»	0,82	0,86	0,89	0,90	0,92	0,94
PJSC «LAZ» (Lviv bus plant)	0,98	0,99	no data	no data	no data	no data

Automakers	Value of indicators					
	2010	2011	2012	2013	2014	2015
PJSC «BAZ»	0,54	0,55	0,56	0,57	0,59	0,63
LLC «Automobile plant «AntoRus»»	0,97	0,97	0,98	no data	no data	no data
PJSC «Chasiv Yar buses plant»	0,36	0,38	0,40	0,43	0,47	0,52
PJSC «Chernihiv autoplant»	0,09	0,10	0,16	0,18	0,22	0,26
JSC «Cherkassy bus»	0,44	0,47	0,52	0,55	0,59	0,63
Assets turnover ratio						
JSC «ZAZ»	0,74	0,72	0,69	0,68	0,65	0,60
BOGDAN Corporation	0,93	0,81	0,69	0,52	0,19	0,14
PrJSC «EUROCAR»	2,06	1,99	1,82	1,59	1,18	0,76
JSC PA «KrASZ»	0,12	0,16	0,14	0,11	0,13	no data
PJSC «AutoKrAZ»	0,19	0,16	0,12	0,14	0,25	0,32
PJSC «LAZ» (Lviv bus plant)	0,02	0,01	no data	no data	no data	no data
PJSC «BAZ»	0,18	0,13	0,15	0,17	0,12	0,09
LLC «Automobile plant «AntoRus»»	0,10	0,06	0,03	no data	no data	no data
PJSC «Chasiv Yar buses plant»	0,57	0,52	0,45	0,41	0,34	0,31
PJSC «Chernihiv autoplant»	0,60	0,54	0,49	0,46	0,44	0,32
JSC «Cherkassy bus»	1,13	1,04	0,96	0,91	0,87	0,99
Coefficient of the equity capital						
JSC «ZAZ»	0,51	0,49	0,47	0,45	-0,11	-0,29
BOGDAN Corporation	0,25	0,22	0,19	0,16	0,01	-0,22
PrJSC «EUROCAR»	0,46	0,52	0,48	0,41	0,25	-0,15
JSC PA «KrASZ»	0,23	0,26	0,19	0,18	-0,13	no data
PJSC «AutoKrAZ»	0,24	0,22	0,21	0,16	0,14	0,08
PJSC «LAZ» (Lviv bus plant)	-0,68	-0,72	no data	no data	no data	no data
PJSC «BAZ»	0,27	0,22	0,21	0,18	0,13	0,12
LLC «Automobile	-0,62	-0,65	-0,69	no	no	no

Automakers	Value of indicators					
	2010	2011	2012	2013	2014	2015
plant «AntoRus»»				data	data	data
PJSC «Chasiv Yar buses plant»	0,98	0,98	0,96	0,97	0,98	0,99
PJSC «Chernihiv autoplant»	0,11	0,08	-0,02	-0,06	-0,01	-0,01
JSC «Cherkassy bus»	0,31	0,35	0,32	0,30	0,27	0,28
Financial stability ratio						
JSC «ZAZ»	0,77	0,82	0,79	0,76	0,39	-0,04
BOGDAN Corporation	0,87	0,90	0,88	0,86	0,75	0,59
PrJSC «EUROCAR»	0,74	0,71	0,68	0,64	0,58	0,55
JSC PA «KrASZ»	0,37	0,34	0,32	0,28	0,21	no data
PJSC «AutoKrAZ»	0,34	0,33	0,31	0,32	0,35	0,35
PJSC «LAZ» (Lviv bus plant)	-0,29	-0,34	no data	no data	no data	no data
PJSC «BAZ»	0,49	0,47	0,42	0,37	0,39	0,36
LLC «Automobile plant «AntoRus»»	-0,16	-0,21	-0,18	no data	no data	no data
PJSC «Chasiv Yar buses plant»	0,98	0,98	0,96	0,97	0,98	0,99
PJSC «Chernihiv autoplant»	0,65	0,63	0,57	0,60	0,54	0,48
JSC «Cherkassy bus»	0,62	0,59	0,61	0,62	0,64	0,63
Coefficient of independence from the borrowed funds						
JSC «ZAZ»	0,96	1,04	1,13	1,22	-10,09	-4,45
BOGDAN Corporation	3,00	3,55	4,26	5,25	9,31	-5,55
PrJSC «EUROCAR»	1,17	0,92	1,08	1,44	3,00	-7,67
JSC PA «KrASZ»	3,35	2,85	4,26	4,56	-8,69	no data
PJSC «AutoKrAZ»	3,17	3,55	3,76	5,25	6,14	11,50
PJSC «LAZ» (Lviv bus plant)	-2,47	-2,39	no data	no data	no data	no data
PJSC «BAZ»	2,70	3,55	3,76	4,56	6,69	7,33
LLC «Automobile plant «AntoRus»»	-2,61	-2,54	-2,45	no data	no data	no data
PJSC «Chasiv Yar	0,02	0,02	0,04	0,03	0,02	0,01

Automakers	Value of indicators					
	2010	2011	2012	2013	2014	2015
buses plant»						
PJSC «Chernihiv autoplant»	8,09	11,50	-51,00	-17,67	-10,00	-10,00
JSC «Cherkassy bus»	2,23	1,86	2,13	2,33	2,70	2,57
Absolute liquidity ratio						
JSC «ZAZ»	0,29	0,25	0,31	0,28	0,14	0,05
BOGDAN Corporation	0,04	0,06	0,02	0,01	0,03	0,03
PrJSC «EUROCAR»	0,13	0,15	0,17	0,18	0,14	0,15
JSC PA «KrASZ»	0,16	0,12	0,10	0,08	0,09	no data
PJSC «AutoKrAZ»	0,04	0,02	0,04	0,01	0,02	0,03
PJSC «LAZ» (Lviv bus plant)	0,001	0,0005	no data	no data	no data	no data
PJSC «BAZ»	0,05	0,03	0,03	0,02	0,01	0,03
LLC «Automobile plant «AntoRus»»	0,01	0,003	0,001	no data	no data	no data
PJSC «Chasiv Yar buses plant»	2,31	1,46	1,68	1,24	1,97	4,28
PJSC «Chernihiv autoplant»	0,06	0,04	0,03	0,03	0,02	0,04
JSC «Cherkassy bus»	0,05	0,08	0,07	0,05	0,06	0,05
Operating profitability						
JSC «ZAZ»	0,18	0,12	0,11	0,08	-0,21	-0,32
BOGDAN Corporation	0,09	0,02	-0,03	-0,08	-1,04	-1,35
PrJSC «EUROCAR»	0,10	0,06	0,02	0,05	0,09	0,12
JSC PA «KrASZ»	0,01	0,01	0,02	0,03	0,01	no data
PJSC «AutoKrAZ»	0,07	0,09	0,10	0,13	0,19	0,24
PJSC «LAZ» (Lviv bus plant)	-1,36	-1,52	no data	no data	no data	no data
PJSC «BAZ»	0,14	0,08	0,06	0,09	0,12	0,11
LLC «Automobile plant «AntoRus»»	-1,27	-1,66	-1,84	no data	no data	no data
PJSC «Chasiv Yar buses plant»	0,07	0,09	0,08	0,05	0,06	0,09
PJSC «Chernihiv	0,15	0,08	0,09	0,06	0,12	0,003

Automakers	Value of indicators					
	2010	2011	2012	2013	2014	2015
autoplant»						
JSC «Cherkassy bus»	0,05	0,06	0,01	0,02	0,01	0,07

* calculated by the authors based on Data bases of Agency for infrastructure development of the stock market in Ukraine «SMIDA»: JSC «ZAZ», BOGDAN Corporation, PrJSC «EUROCAR», PJSC «AutoKrAZ», PJSC «Chasiv Yar buses plant», PJSC «Chernihiv autoplant», JSC «Cherkassy bus».

Conclusions and suggestions

According to research results the authors identify major problems of development of the automotive industry in Ukraine in 2010-2015, such as:

- catastrophic decrease of the production volume of cars, trucks and buses;
- reduction of the production capacity of automotive industry enterprises;
- loss of the competitiveness of the domestic automakers on the national automobiles market;
- increase of the dependence of automakers from borrowed funds;
- prevailing unprofitability of automakers and bankruptcy of some of them.

The discovered peculiarities indicate the urgent need for state regulation of development of the automotive industry in Ukraine.

Currently the state regulation of development of the automotive industry and the automobiles market is carried out through the application of the macro-economic approach. In view of this it is expedient to implement a partial decentralization of the state regulation of the automotive industry development.

This means the implementation of the regional and microeconomic approaches to the state regulation of the development of the automotive industry in Ukraine.

Thus the prospect of further research is the creation of the effective mechanism for state regulation of development of the automotive industry in Ukraine, which will provide solving the identified problems.

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FORMATION OF THEORETICAL FUNDAMENTALS AND STRATEGY OF INVESTMENT-INNOVATIVE ECONOMIC DEVELOPMENT AT MACRO AND MICRO LEVEL IN GLOBALIZATION CONTEXT

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Abstract. The article considers the theoretical foundations and strategic directions of investment -innovative development at the macro and micro level in a global environment. Summarizing the approaches developed in domestic and world science, the author has formulated a copyright definition of innovative development. The study has revealed the chain nature of investment - innovative development that has sequential generation of innovation through investments in a geometrical progression to infinity. To meet the needs of the analysis and formation of the strategy of investment-innovative development of Ukrainian economy at the macro and micro level in the context of globalization, the author has recommended to use a common methodological approach to record keeping and reporting, determining components of investment - innovative development and to provide for the replacement of the term "investment" activities with "investment-innovation" activities in the accounting documents.

Keywords: theoretical fundamentals**,** strategy, investment-innovative development, globalization.

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Introduction

In the context of globalization, effective development of national economy based on investment and innovation is possible provided that it has a clearly defined and properly structured theoretical framework. A coordinated information policy in the society will facilitate and expedite the process of applying the investment-innovative model of development of national economy in a practical way. The focus area of this policy is to prove the inevitability and usefulness of the transition of the economy at both macro and micro level from an industrial era to a postindustrial knowledge economy, which is based on investment, innovation, intelligence, science and the like. It is important to be aware of undeniable advantages and the positive results of using investment-innovative levers of development at the management level of enterprises that operate in the domestic and international markets. Given this, the formation of the theoretical foundations and shaping a strategy of investment-innovative development of the economy at the macro and micro level in the context of globalization, should be considered relevant and timely.

Theoretical fundamentals of investment - innovative economic development

A number of Ukrainian economists such as V. Andriychuk, M. Fleichuk, A. Mokii, O. Amosha, A. Galchynskyi, V. Geyets, V. Gusev, L. Malyuta, E. Molchalova, I. Pavlenko,

I. Prokopenko, T. Stovbun, P. Svirko, V. Semynozhenko, O. Sobkevych, A. Sukhorukov, V. Fedorenko, and A. Chukhno carried out the studies of the theoretical foundations of investment-innovative development of Ukraine.

Many foreign scientists, among them are S.Glazyev, P. Drucker, N. Ivanova, G. Keynes, M. Kondratiev, B. Kuzyk, S.Kuznets, G.Mensh, R. Nelson, M. Porter, P. Romer, B. Santo, A. Spiethoff, J. Schumpeter, A. Hansen, Yu. Yakovets, K. Yanovskyi and others, focused on the study of different conceptual approaches to the disclosure of the concepts "investment" and "innovation", disclosing the nature of the relationship between them, defining the stages and components of the investment-innovation process and building the model of investment-innovation development of the economy at the macro and micro level under the influence of global factors.

Nevertheless, terminological and structural components of investment and innovation development of the economy require further systematization and generalization. In general, priority should be given to addressing the issues that have not found a clear solution in academia. These include searching for the relationship between investment and innovation as determinants of economic growth, determining the ways of the enterprise development and building a model of investments and innovative products cycle. It is investment and innovative development of the national economy as well as the formation of its strategy that should be given priority.

The aim of the article is to systematize and generalize the existing terminology and to provide recommendations on the formation of theoretical foundations and shaping the strategy of investment-innovative development of the economy at the macro and micro level in the context of globalization.

In the Academic Explanatory Dictionary of the Ukrainian language the term "development" has the following interpretation: 1) action by importance; 2) the process by which a change in the quality of something occurs, the transition from one qualitative state to another, higher; 3) the degree of education, culture, mental, and spiritual maturity. (Academic Explanatory Dictionary of the Ukrainian language, 2016).

Joseph Alois Schumpeter interpreted the term "development" as "... the fact of constant change of historical conditions, which, for this reason, become historically individual in time. And each subsequent historical condition can be adequately understood from the previous one." For I. A. Schumpeter, economic development is a fundamentally new use of the services of labor and land, which is carried out in the form of making new combinations (Schumpeter, 2008).

Scientists often turn to addressing the opportunities and challenges of development at the critical stages of the society, in conditions of the critical state of socio-economic systems, when the country needs to find a way out of economic recession and switch to gradual recovery and growth of the economy at the macro and micro level.

Development should be distinguished from growth, although these concepts are close and constantly intersect. In the Explanatory Dictionary by Ozhegov, growth is referred to as: 1) an increase in number, size, and development; 2) improvement of the development process.

Scientific literature distinguishes between "catching-up development", "accelerated development", "advanced development", "sustainable development" and "innovation (investment - innovative) development."

M. Z. Zgurovsky treats "catching-up development" as movement of the national economy to the level already achieved by a country or group of countries (Zgurovsky, 2010).

The concept of accelerated economic development originated in the Soviet Union. The aim of this development is to achieve a qualitatively new state of maturity of the civil society by implementing an acceleration strategy with the use of economic policy instruments. The latter contains a social dimension and a number of economic, organizational, political and ideological processes of acceleration.

"Accelerated development" aims at acquiring a higher level of development compared to the level already achieved by a specific country (group of countries). This development is based on a sharp increase in innovative activity for the timely creation of new opportunities for economic growth. It is carried out on a new technological base and provides transition of the economy to a higher level of efficiency. Given this, we can argue that the concept of accelerated development can be implemented through the model of investment-innovation economy at the macro and micro level, with mandatory development of human capital. Thus, advanced development is based on scientific and technical progress (STP) and scientific knowledge. STP, which is implemented in full due to globalization processes, enhances the international scientific and technical exchange, opens up access to new technologies to less developed countries, aligning technological development between the countries of the world. (Hlaziev, 2010).

Over the last decade of the twentieth century the principles of sustainable development and the innovative development concept established as guidelines for the progress of world civilization. The principles of sustainable development were approved by the world community at the UN Conference on environment and development in Rio de Janeiro (1992)." In 1994, they were published in the finished form in the United Nations "Human Development Report," namely, in the universal concept of sustainable development.

According to the nature of these principles, the development is considered sustainable when, subject to achieving sustainable growth, it ensures equitable distribution of its results, the development of human potential and realization of women's rights, the preservation and restoration of the environment for present and future generations.

According to researchers of sustainable development, innovative economy is essentially a "knowledge economy", because the main part of the cost of the total product falls on knowledge, not manufacturing.

The essence of the concept of innovative development is the achievement of economic development through large-scale introduction of products of intellectual labor (knowledge, technologies, scientific-technical developments, etc.) in economic circulation for their commercialization and the achievement of socio-economic impact. The concept of innovative development proves the way to achieve sustainable economic growth through innovative development of human potential, reduction of anthropogenic load on a human and environment.

For identifying the characteristics of "innovative development", we have analyzed and systematized approaches to the definition of this concept proposed by scientists.

We have singled out characteristics that are inherent in "innovative development" at the macro and micro level in global economic conditions:

1) At the macro level, the term "innovation development" is used when talking about the construction of the state innovation development models, carrying out research on the mechanism of realization of scientific and technological progress in the economic development of the country, the region, the formation of knowledge economy, searching for new sources of economic growth and more. At the present stage of world economic civilization one can witness transition from industrial to post-industrial phase of development

of society because of modern innovative technological factors. For the post-industrial society the characteristic features are as follows:

- improving the efficiency and productivity through the use of modern high and flexible technologies;
- globalization of information exchange;
- spread of distribution networks of production organization instead of its concentration;
- increasing intellectualization of production, which involves increasing the share of intellectual intangible assets in the asset structure of the enterprise;
- a high level of education and information-technological competence of the person.

2) At the micro level, the term "innovation development" is used to describe the process of economic change at the enterprise level through innovation.

Investment-innovative activity at all levels of the economic system is considered to be the basis for transition to the investment-innovative development. For the needs of analysis and shaping the strategy of investment and innovation development of Ukrainian economy at the macro and micro level in the context of globalization, we consider it necessary to establish a unified methodological approach to the accounting of investment and innovation and generalization of accounting information in the financial statements as part of the investment, operating or financing activities. Although it makes no sense to consider innovation as a separate type of business, but it should be accounted for in constant relationship with the operating, financial and investment activities. Moreover, the priority task is to link the innovation process with investment activities, because it is impossible to develop and implement innovations without the investment costs for these needs. The process of transformation of funds, scientific research, technical solutions, improved competitive technologies to qualitatively new fixed assets, other tangible and especially intangible assets is carried out through investment activities.

We propose to define the investment-innovative development as a targeted process of positive shifts through investment in innovations that will result at the micro level – in an increase in the efficiency of economic activity of enterprises and at the macro level – in the growth of the national economy, scientific and technological development and qualitative improvement of the standard of living of the population. The resources that are introduced in the commercial or economic process (in particular in investment and innovation processes) as potential sources of economic benefits can include: natural resources (natural substances that are potentially suitable for the use in the production process); material resources (everything made by human labor that is necessary for the production process); labor resources and human staff who are involved in all stages of the process; investment and financial resources; information and intellectual resources, in particular the objects of intellectual property rights of different nature (inventions, results of research and development (R & d), patents and the like).

These resources should be put into the economic process (including investment, innovation processes) and directed by intelligent resource of management solutions.

Intellectual resources with prospects for commercialization, when they materialize, and intellectual resources of management solutions that are guided by these processes, are crucial for investment and innovation processes.

The main stages of the transformation of intellectual property into innovative products (services) at the micro level are shown in Fig. 1.

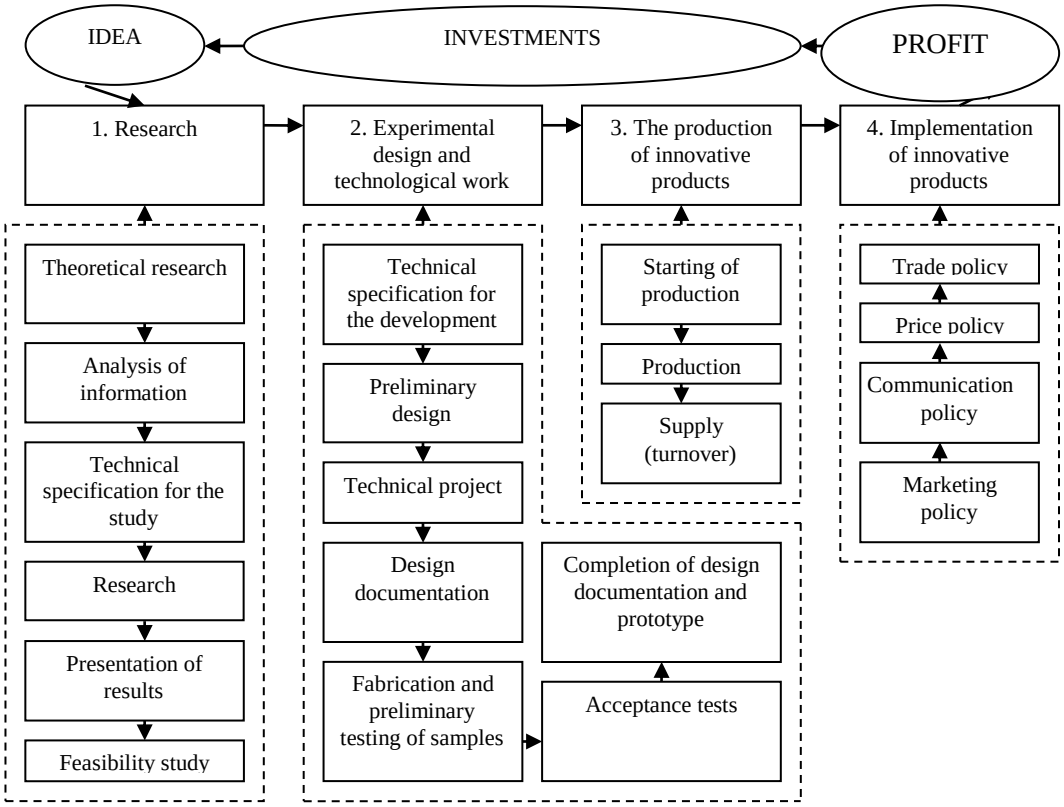

Fig. 1. The stages of the cycle of investment and innovation products (services) at the micro level (Compiled by the author)

Consequently, investment and innovation are the main determinants of economic growth in any country because they contribute to the formation of innovative type economy. It makes sense to agree with A.V.Uhina, who argues that innovation is a qualitative component of economic growth while investment is quantitative. Innovation, which belongs to high-quality investment component, defines various areas of refinancing funds in the relevant technologies, products and services. This allows economic system to achieve the highest level of development (Uhina, 2016).

Investment as a quantitative component creates conditions for a real economic breakthrough of Ukraine, making structural changes in the national economy through innovation.

The strategy of investment-innovative development of the economy at the macro and micro level in the context of globalization

Formation of strategy of investment and innovation development of Ukraine's economy at the macro and micro level in the context of globalization depends on the chosen model of economic reforms in the country.

According to the Dictionary of Economic Terms, the definition of economic modeling in the economy (Fr. Modelle, from Lat. Modulus - measure sample) is a reproduction of economic objects and processes in cramped, small, experimental forms in artificial conditions (full scale simulation). Economics often uses mathematical modeling to describe economic processes with mathematical dependencies (Dictionary of Economic Terms, 2016).

V. P. Gordienko argues that in modern conditions the most effective is the innovation-investment model of development aimed at overcoming structural deformations in the economy of surrounding areas through the modernization, renovation of production assets, the increase in the share of high-tech industries, the expansion of capacity of the labor market, enhancing the export potential and the like. (Gordienko, 2012).

In General, taking such a position, it is appropriate to focus on the provision of priority in the model of investment-innovation development of the economy of Ukraine to high-quality human capital, which promotes intense shifts of innovative character. Fig. 2 presents the author's model of investment-innovative development of Ukrainian economy at the macro and micro level in the global environment through enhancing human capital.

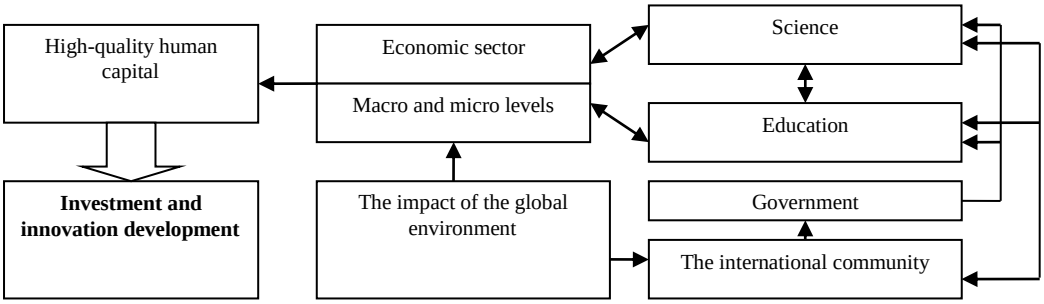

Fig. 2. Author's model of investment-innovation development of Ukrainian economy at the macro and micro level in the global environment through enhancing human capital
(Compiled by the author)

After all, the state must make a bet solely on high-quality human capital, to include competitive science, advanced education and high-tech business in a list of the main drivers of its economy.

From the point of view of N.V. Ivanova, investment-innovative development model is an economic model of development of the productive forces of the country, which is based on the use of high technology, contributing to the creation of competitive products for domestic consumption and export to foreign markets. (Ivanova, 2014). This model is complex and is formed from a set of elements in a dynamic interconnection: production of scientific knowledge and innovation; education and training; commercialization of scientific knowledge and innovation; using innovation; management and regulation of innovation development of the economy; financial security reforms.

Scientific and technical potential of our country is pretty powerful, but due to inefficient management the development and implementation of innovations is quite passive. It requires refocusing on the high-tech way of further development. The government should make a bet solely on high-quality human capital, to include competitive science and advanced education and high-tech business in the list of main drivers of its economy.

Analysis of the listed strategies used by developed countries in upgrading the industrial activities on the investment and innovation basis allows forming a national development strategy, which is shown in Fig. 3.

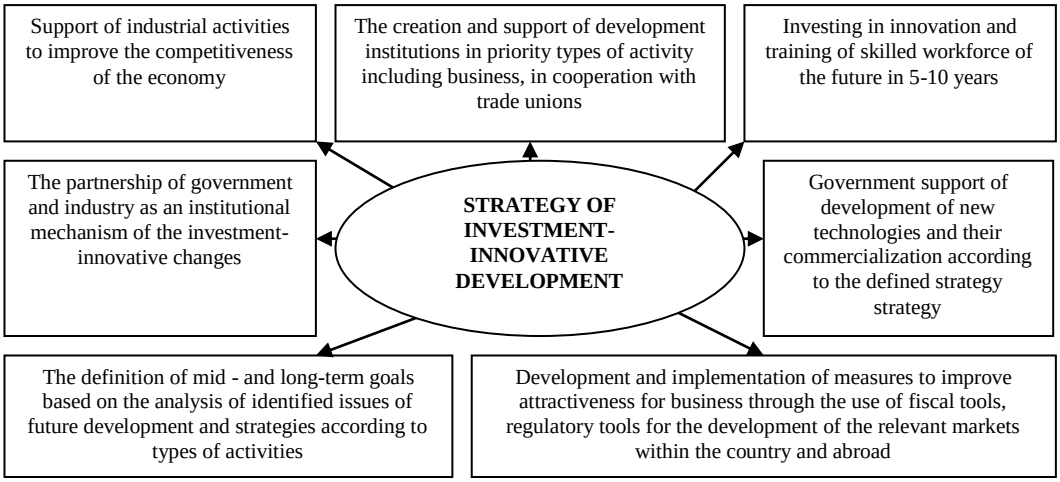

Fig. 3. Components of the strategy investment and innovation development of Ukraine
(Compiled by the author)

The model of investment and innovation development of economy manifests itself at different levels, hence the need to change approaches to their management.

Conclusions and suggestions

Thus, the article deals with theoretical principles and strategic directions of investment and innovation development at the macro and micro level in the global environment. Based on the analyses of the achievements of domestic and foreign scientists, the concept "development" is regarded as the process of accumulation of positive shifts, which changes the quantity and/or quality of a particular economic phenomenon (or its separate components) with the transition to higher quantitative and/or qualitative status.

Summarizing the existing in domestic and global economic thought approaches, a copyright definition of innovative development has been proposed, in which the concept "innovative development" implies a targeted process of positive shifts through innovation, which will lead, at the micro level – to the increase in the efficiency of economic activity of enterprises and at the macro level - to the growth of the national economy, scientific and technological development and qualitative improvement of the standard of living of the population.

The study has revealed the chain nature of investment - innovative development that has sequential generation of innovation through investments in a geometrical progression to infinity.

In the study, investment-innovative development is regarded as a targeted process of positive shifts through investment in innovations that will result at the micro level – in the

increase in the efficiency of economic activity of enterprises and at the macro level – in the growth of the national economy, scientific and technological development and qualitative improvement of the standard of living of the population..

To meet the needs of the analysis and formation of the strategy of investment-innovative development of Ukrainian economy at the macro and micro level in the context of globalization, the author has recommended to use a common methodological approach to record keeping and reporting, determining components of investment - innovative development and to provide for the replacement of the term "investment" activities with "investment-innovation" activities in the accounting documents.

A promising area for further study of the issue is the formation of a complex accounting and analytical mechanism for management of investment-innovative development of enterprises.

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DEVELOPMENT TENDENCIES OF ELECTRONIC COMMERCE IN SMALL AND MEDIUM SIZED ENTERPRISES. CASE OF LATVIA AND POLAND

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Abstract. One of the preconditions for further development of small and medium-sized enterprises, which comprise a majority in total number of enterprises, is identification and exploitation of digital opportunities. The study aim is to explore e-commerce trends in Latvia's and Poland's small and medium-sized enterprises. The study was conducted on the basis of scientific publications, data of the statistical bureaus of Latvia and Poland on use of information and communication technologies, and e-commerce by small and medium-sized enterprises, and other sources of information. The following research methods were used in the research: monographic descriptive method, analysis, synthesis, statistical method. The research results show that Latvia's and Poland's small and medium-sized enterprises relatively little use e-commerce opportunities both for their operations, and for buying and selling transactions.

Keywords: electronic commerce, small and medium-sized enterprises, Latvia, Poland

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Ievads

Mūsdienās uzņēmumu, t.sk. mazo un vidējo uzņēmumu (MVU)attīstība nav iedomājama bez informācijas un komunikāciju tehnoloģiju (IKT) izmantošanas. Elektroniskās komercijas un tās ietekmes uz MVU attīstību pētījumi (Rao, et.al, 2003; Taiminen, Karjaluoto, 2015) liecina, ka MVU pilnībā neizmanto digitalizācijas piedāvātās iespējas, bet apstiprina, ka elektroniskā komercija sekmē MVU attīstību (Ghobakhloo, et.al, 2011), pozitīvi ietekmē MVU darbības rādītājus (Morgan-Thomas, 2016) un rosina turpmāk paplašināt IT izmantošanas iespējas MVU darbībā (Abebe, 2014). Zinātnieki aktualizē sociālo tīklu izmantošanas un investīciju atdeves mērīšanas jautājumus MVU (McCann, Barlow, 2015) un secina, ka vissvarīgākā e-komercijas priekšrocība ir uzlabots uzņēmuma zīmols un korporatīvais tēls (Jahanshahi, et.al, 2013).

2016.gada februārī Tirgus un sabiedriskās domas pētījumu centra SKDS veiktās Uzņēmēju aptaujas par uzņēmuma darbībā izmantotajiem informācijas tehnoloģiju rīkiem, rezultāti parāda, ka Latvijas MVU vadītāji izprot informācijas tehnoloģiju produktuun pakalpojumu nozīmi darba efektivizēšanā, taču nesteidzas ar modernāko programmu iegādi. Vairāk nekā tūkstoti eiro programmatūras uzlabojumos 2016.gadā plānoja ieguldīt vien 18% aptaujāto kompāniju. Aptaujas dati rāda, ka vismaz 80% aptaujāto uzņēmēju, kuru rīcībā ir jaunākās informācijas tehnoloģijas, novērojuši uzņēmuma darba efektivitātes pieaugumu. Modernie rīki ļauj automatizēt daļu darbu, kas iepriekš bija jāveic kādam darbiniekam, strādājošie var pieslēgties uzņēmuma serveriem no jebkuras vietas un piekļūt informācijai, kas iepriekš prasīja došanos uz biroju, tādēļ šajos uzņēmumos augusi gan darba produktivitāte,

gan apgrozījums (Vēvers, 2016). Autores secina, ka MVU vadītāji apzinās modernu informācijas tehnoloģiju risinājumu priekšrocības, bet ievieš tos pakāpeniski.

Autores uzskata, ka elektroniskās komercijas attīstības tendenču analīze un sistematizēšana MVU ir vitāli svarīga un ir būtisks nosacījums turpmāko pasākumu noteikšanai elektroniskās komercijas aktivizēšanai MVU.

*Pētījuma mērķis:*izpētīt elektroniskās komercijas attīstības tendences Latvijas un Polijas MVU.

Pielietotās pētījuma metodes: monogrāfiski aprakstošā metode, analīze, sintēze, statistikas metode. Pētījums veikts pamatojoties uz zinātnieku publikācijām, Latvijas un Polijas statistikas pārvalžu informāciju par informācijas un komunikāciju tehnoloģiju un elektroniskās komercijas izmantošanu MVU, un citiem informācijas avotiem.

IKT lietošana un elektroniskā komercija uzņēmumos

Latvijā interneta pieslēgumu kvalitāte un pieejamība ir virs vidējā rādītāja ES, tomēr jāsecina, ka digitālo tehnoloģiju integrācija Latvijas uzņēmumos ir būtiski zemāka. Neskatoties uz to, ka Latvijas uzņēmumu īpatsvars, kuriem ir savas mājaslapas 2014.-2016.gadā palielinās (1.tabula), tomēr tas ir zemāks rādītājs nekā Polijai un vidēji Eiropas Savienībā (ES) (2014.gadā – 74%, 2015.gadā – 75% un 2016.gadā – 77%)

1.tabula

Uzņēmumu mājaslapas un to iespējas 2014.-2016.gadā, %
(autoru sastādīta izmantojot Społeczeństwo informacyjne w Polsce, 2011-2015; 2012-2016; Informācijas un komunikācijas, …2015; 2016)

		2014.gads			2015.gads			2016.gads		
		Kopā	Mazie	Vidējie	Kopā	Mazie	Vidējie	Kopā	Mazie	Vidējie
Uzņēmumi, kuriem ir mājaslapa										
Latvija (LV)		55,9	50,7	78,4	59,0	53,3	83,8	63,5	58,8	84,2
Polija (PL)		65,3	61,1	84,9	65,4	61,3	83,9	67,0	62,3	86,1
Uzņēmuma mājaslapu iespējas										
produktu katalogu un cenrāžu pieejas nodrošināšana	LV	51,4	46,9	72,0	55,2	50,2	78,0	60,0	55,7	78,8
	PL	60,4	56,5	78,8	60,3	56,6	76,6	63,6	59,4	80,6
pasūtījumu veikšana vai rezervācija tiešsaistē	LV	14,6	13,1	21,4	15,3	14,2	19,7	17,1	16,3	20,3
	PL	13,5	12,5	17,3	13,0	12,0	17,0	13,5	12,3	17,7
darba piedāvājumu aplūkošana vai darba pieteikumu aizpildīšana tiešsaistē	LV	11,7	8,5	23,4	13,3	9,4	27,3	15,5	11,7	31,1
	PL	16,0	11,9	12,1	16,5	12,1	32,1	18,3	13,4	33,6

Uzņēmumu mājaslapu iespēju analīze 2014.-2016.gadā liecina, ka uzņēmumu mājaslapas galvenokārt tiek izmantotas, lai sniegtu klientiem iespēju iepazīties ar preču vai pakalpojumu aprakstiem un cenrādi. Uzņēmumi piedāvā pasūtījumu veikšanu vai rezervāciju

tiešsaistē un darba piedāvājumu aplūkošanu vai darba pieteikumu aizpildīšanu tiešsaistē. Kā arī var secināt, ka, palielinoties uzņēmuma lielumam palielinās arī mājaslapu iespējas.

Latvijas Republikas (LR) Centrālās Statistikas pārvalde (CSP) uzņēmumu mājas lapu iespēju novērtēšanā izdala tādu uzņēmuma mājaslapu iespēju kā saites vai atsauces nodrošināšana uz uzņēmuma profiliem sociālajos medijos. 2016.gadā šādu iespēju nodrošināja 18,9% uzņēmumu, t.sk. 16,4% mazo uzņēmumu un 27,7% vidējo uzņēmumu. LR CSP uzņēmumu mājas lapu iespēju novērtēšanā izdala arī tādu uzņēmuma mājaslapu iespēju kā pasūtījuma statusa izsekošana tiešsaistē. 2016.gadā šādu iespēju nodrošināja 6,4% uzņēmumu, t.sk. 5,9% mazo uzņēmumu un 8,5% vidējo uzņēmumu.

Polijas statistikas pārvalde uzņēmumu mājas lapu iespēju novērtēšanā izdala tādu uzņēmuma mājaslapu iespēju, kaapmeklētāji var pielāgot vai izstrādāt produktu. 2016.gadā šādu iespēju nodrošināja 12,6% uzņēmumu, t.sk. 11,0% mazo uzņēmumu un 15,3% vidējo uzņēmumu. Polijas statistikaspārvalde uzņēmumu mājas lapu iespēju novērtēšanā izdala arī tādu uzņēmuma mājaslapu iespēju kā personalizēts saturs regulāriem, atkārtotiem apmeklētājiem. 2016.gadā šādu iespēju nodrošināja 7,6% uzņēmumu, t.sk. 6,4% mazo uzņēmumu un 11,3% vidējo uzņēmumu.

Latvijas un Polijas uzņēmumi savā darbībā izmanto sociālos medijus. 2016.gadā aptuveni katrs ceturtais uzņēmums Latvijā un Polijā savā darbībā izmantoja vismaz vienu no sociālajiem medijiem. 2016.gadā Latvijā šādu uzņēmumu īpatsvars sasniedza 24,9 % no uzņēmumu kopskaita, bet Polijā 23,4% no uzņēmumu kopskaita (2.tabula)

2.tabula

Interneta sociālo mediju lietošana uzņēmumos 2014.-2016.gadā, %

(autoru sastādīta izmantojot Społeczeństwo informacyjne w Polsce, 2011-2015; 2012-2016; Informācijas un komunikācijas, …2015; 2016)

		2014.gads			2015.gads			2016.gads		
		Kopā	Mazie	Vidējie	Kopā	Mazie	Vidējie	Kopā	Mazie	Vidējie
Uzņēmumam bija savs profils vai konts kādā no šiem interneta sociālo mediju veidiem:										
sociālie tīkli (piem., *Facebook, LinkedIn, Xing, Viadeo, Yammer* u.tml.)	LV	16,9	14,7	24,6	24,8	23,0	29,6	24,9	22,2	34,3
	PL	18,4	16,6	24,8	20,3	18,2	27,7	23,4	20,9	30,9
uzņēmuma emuāri vai mikroemuāri (piem., *Twitter, Presently* u.tml.)	LV	7,9	6,3	12,5	9.1	7,4	13,9	8,8	7,0	15,1
	PL	3,4	2,8	4,8	4,1	3,4	6,3	4,4	3,5	6,7
multivides satura koplietošanas vietnes (piem., *YouTube, Flickr, Picasa, SlideShare* u.tml.)	LV	5,6	4,4	9,9	7,1	5,2	14,0	7,7	5,7	15,9
	PL	8,6	7,3	12,7	8,0	6,1	14,5	8,6	6,8	13,3
viki vietnes, kas balstītas uz zināšanu apmaiņu	LV	2,1	1,7	3,9	3,4	3,0	5,4	3,1	2,6	5,7
	PL	3,5	3,1	4,1	2,6	2,0	4,6	2,4	1,9	2,8

Palielinoties uzņēmuma lielumam palielinās arī to uzņēmumu īpatsvars, kas izmanto sociālos medijus.

Latvijas uzņēmumu vidū kā nākošos populārākos sociālos medijus var minēt uzņēmuma emuārus vai mikroemuārus un multivides satura koplietošanas vietnes. 2016.gadā Latvijas uzņēmumu īpatsvars, kas izmantoja uzņēmuma emuārus vai mikroemuārus sasniedza 8,8% no uzņēmumu kopskaita un, salīdzinot ar 2014.gadu, palielinājās par 0,9%. 2016.gadā Latvijas uzņēmumu īpatsvars, kas izmantoja multivides satura koplietošanas vietnes sasniedza 7,7% no uzņēmumu kopskaita un, salīdzinot ar 2014.gadu, palielinājās par 2,1%.

Polijas uzņēmumu vidū kā nākošos populārākos sociālos medijus arī var minēt multivides satura koplietošanas vietnes un uzņēmuma emuārus vai mikroemuārus. 2016.gadā Polijas uzņēmumu īpatsvars, kas izmantoja multivides satura koplietošanas vietnessasniedza 8,6% no uzņēmumu kopskaita, bet to uzņēmumu īpatsvars, kas izmantoja uzņēmuma emuārus vai mikroemuārus 4,4% no uzņēmumu kopskaita un, salīdzinot ar 2014.gadu, palielinājās par 1,0%.

Latvijā palielinās to uzņēmumu īpatsvars no uzņēmumu kopskaita, kas izmanto internetu, aplikācijas un citus datortīklus, lai iepirktu preces vai pakalpojumus. Kopš 2013.gada šādu uzņēmumu īpatsvars ir ievērojami palielinājies un 2015.gadā sasniedza 41,1 % no uzņēmumu kopskaita. Polijā to uzņēmumu īpatsvars no uzņēmumu kopskaita, kas izmanto internetu, aplikācijas un citus datortīklus, lai iepirktu preces vai pakalpojumus 2015.gadā bija par 6,3% mazāk (3.tabula).

3.tabula

E-komercija uzņēmumos pēc lieluma 2013.-2015.gadā, %

(autoru sastādīta izmantojot Społeczeństwo informacyjne w Polsce, 2011-2015; 2012-2016; Informācijas un komunikācijas, …2015; 2016)

		Pirkšana e-komercijā			Pārdošana e-komercijā		
		uzņēmumi, kas veikuši pirkumus (% no attiecīgās grupas uzņēmumu kopskaita)			uzņēmumi, kas pārdevuši preces vai pakalpojumus (% no attiecīgās grupas uzņēmumu kopskaita)		
		2013	2014	2015	2013	2014	2015
Pavisam	LV	32,0	35.1	41,1	9,3	10,0	10,2
	PL	…	…	34,8	11,7	11,8	12.4
Mazie	LV	29,4	32,3	38,7	8,2	8,4	9,1
	PL	…	…	31,5	10,1	9,8	10,2
Vidējie	LV	42,1	44,7	50,8	13,8	16,2	14,4
	PL	…	…	44,8	16,1	18,6	18,8

… - trūkst datu.

Iespēju pārdot savas preces vai pakalpojumus internetā, aplikācijās vai citos datortīklos 2015.gadā Latvijā izmantoja katrs desmitais uzņēmums jeb 10,2% no uzņēmumu kopskaita. Polijā iespēju pārdot savas preces vai pakalpojumus internetā, aplikācijās vai citos datortīklos 2015.gadā izmantoja 12,4% no uzņēmumu kopskaita, kas sastādīja par 2,2% vairāk nekā Latvijā.

Digitālās ekonomikas sabiedrības indeksa novērtējums

Digitālās ekonomikas un sabiedrības indekss (DESI) ir salikts rādītājs, ko izstrādājusi Eiropas Komisija (ĢD CNECT) ES valstu attīstības novērtēšanai ceļā uz digitālo ekonomiku un sabiedrību. Tajā summēts attiecīgo rādītāju kopums, strukturējot 5 aspektos: savienojamība, cilvēkkapitāls, interneta lietošana, ciparu tehnoloģiju integrācija un digitālie publiskie pakalpojumi.

Atsevišķas valsts kopējā punktu skaita aprēķināšanai, katrai rādītāju grupai un apakšgrupai Eiropas Komisijas (EK) eksperti ir piešķīruši konkrētu vērtējuma koeficientu. Savienojamība un digitālās prasmes jeb cilvēkkapitāls, kas tiek uzskatīti par digitālās ekonomikas un sabiedrības stūrakmeņiem, katrs veido 25% no kopējā punktu skaita. Digitālo jeb ciparu tehnoloģiju integrācija veido 20%, jo IKT izmantošana uzņēmējdarbībā ir viens no nozīmīgākajiem izaugsmes virzītājspēkiem. Tādi aspekti kā interneta lietošana un digitālie publiskie pakalpojumi veido 15%. DESI ir elastīgi izmantojams tiešsaistes rīks, kas lietotājiem ļauj eksperimentēt ar dažādiem katra rādītāja vērtēšanas koeficientiem un secināt, kā tas ietekmē kopējo vietu sadalījumu.

DESI 2016 veido galvenokārt no rādītājiem, kas attiecas uz 2015.kalendāro gadu (ja dati par attiecīgo kalendāro gadu nav pieejami, izmantoti jaunākie pagājušo gadu dati). DESI rezultāti ir no 0 līdz 1, jo augstāks rezultāts, jo labāks valsts sniegums. Saskaņā ar DESI 2016 Latvija ietilpst valstu grupā, kuras cenšas panākt pārējās — valstis, kuras ir zem ES vidējā rezultāta, bet kuru rezultāts audzis straujāk nekā ES kopumā (salīdzinājumā ar DESI 2015). Līdzīgā situācijā ir arī Spānija, Horvātija, Itālija, Rumānija un Slovēnija. Saskaņā ar DESI 2016 Polija ietilpst valstu grupā, kuru rezultāts audzis lēnāk nekā ES kopumā (salīdzinājumā ar DESI 2014 un 2015). Pārējās valstis dotajā valstu grupā ir Bulgārija, Kipra, Čehija, Grieķija, Francija, Ungārija un Slovākija.

DESI 2016 Latvijas kopējais rezultāts ir 0,49 un tā ir 19.vieta no 28 ES dalībvalstīm. Polijas kopējais rezultāts ir 0,43 un tā ir 22.vieta no 28 ES dalībvalstīm (skat.1.tabulu). Salīdzinot DESI 2016 ar DESI 2015 jāsecina, ka Latvijai un Polijai snieguma rezultāti nav būtiski mainījušies.

2016. gada EK DESI dati (Download Scoreboard reports, 2016) liecina, ka savienojamības aspektā Latvija ierindojas 10. vietā, bet Polija 24.vietā no 28 ES dalībvalstīm. Latvija nodrošina plašu nākamās paaudzes piekļuvi (*NGA*). Latvijā ir ātrdarbīgāks pieslēgums nekā vidēji ES (91% mājokļu ir piekļuve *NGA* salīdzinājumā ar 71% ES un 61% Polijā), savukārt vidēji ES ir labāks fiksētās platjoslas pārklājums (97 % mājokļu salīdzinājumā ar 93% Latvijā, bet Polijā 86%). Neskatoties uz to, ka vērojama pozitīva tendence fiksētās platjoslas izmantošanā, Latvijas rādītāji ir zem Polijas un ES vidējā rādītāja mobilās platjoslas pārklājuma un izmantošanas ziņā (65 abonenti uz 100 iedzīvotājiem salīdzinājumā ar 94 abonentiem uz 100 iedzīvotājiem Polijā un ES vidējo rādītāju 75).

DESI 2016 cilvēkkapitāla aspektā Latvija ierindojas 23.vietā, bet Polija 22.vietā no 28 ES dalībvalstīm. Cilvēkkapitāla aspektā Latvija un Polija atpaliek no ES vidējā rādītāja. Latvijā interneta lietotāji sastādīja 75% no iedzīvotājiem vecuma grupā no 16 līdz 74 gadiem un tuvinās ES vidējam līmenim (76%), bet Polijā interneta lietotāji sastādīja tikai 65% attiecīgajā vecuma grupā. Tajā pašā laikā Latvijas un Polijas iedzīvotāju (16-74 g.v.) digitālās pamatprasmes atpaliek no ES vidējā rādītāja. Attiecībā uz augsta līmeņa digitālajām prasmēm, Latvijā un Polijā ir mazāk IKT speciālistu (2 % un 3% salīdzinājumā ar 3,7% ES), kas var kavēt Latvijas un Polijas uzņēmumu darbības digitālo attīstību un publiskā sektora modernizāciju.

4.tabula

DESI Latvijā un Polijā 2015.-2016.gadā
(Latvia. Digital Scoreboard, 2016; Poland. Digital Scoreboard, 2016)

	Latvija (LV)		Polija (PL)		ES rezultāts
	Vieta	Rezultāts	Vieta	Rezultāts	
Kopējais					
DESI 2015	19	0,46	22	0,42	0,5
DESI 2016	19	0,49	22	0,43	0,52
1. Savienojamība					
DESI 2015	10	0,64	24	0,5	0,57
DESI 2016	10	0,65	24	0,51	0,59
2. Cilvēkkapitāls					
DESI 2015	22	0,45	20	0,46	0,58
DESI 2016	23	0,46	22	0,47	0,59
3. Internetalietošana					
DESI 2015	9	0,51	23	0,4	0,43
DESI 2016	9	0,54	22	0,41	0,45
4. Digitālāstehnoloģijasintegrācija					
DESI 2015	28	0,19	26	0,21	0,33
DESI 2016	27	0,22	25	0,23	0,36
5. Digitāliepubliskiepakalpojumi					
DESI 2015	18	0,49	12	0,61	0,54
DESI 2016	14	0,57	15	0,56	0,55

DESI 2016 interneta lietošanas aspektā Latvija ierindojas 9.vietā, bet Polija 22.vietā no 28 ES dalībvalstīm. Latvijas iedzīvotāji biežāk nekā vidēji ES izmanto dažādus tiešsaistes pakalpojumus un šajā aspektā Latvijas rezultāti ir vislabākie salīdzinājumā ar citiem novērtētajiem aspektiem. Sevišķi bieži Latvijas iedzīvotāji izmanto tiešsaistes banku pakalpojumus (81%), šajā ziņā vērojams liels pieaugums salīdzinājumā ar iepriekšējo gadu. Polijā tiešsaistes banku pakalpojumi sastādīja tikai 46%. Latvijā un Polijā pieauga arī iepirkšanās tiešsaistē, tomēr vēl aizvien nav sasniegts ES vidējais rādītājs. Latvijā arī daudzas citas iespējas (ziņas tiešsaistē, sociālie mediji, videozvani) iedzīvotāji izmanto biežāk nekā vidējais Eiropas iedzīvotājs.

DESI 2016 Digitālo tehnoloģiju integrācijas aspektā Latvija ierindojas 27.vietā, bet Polija 25.vietā no 28 ES dalībvalstīm. Digitālo tehnoloģiju integrācijā uzņēmumos Latvijai ir gandrīz vissliktākais rādītājs ES, Polijas sniegums ir mazliet augstāks. Latvijas un Polijas uzņēmumi atpaliek no ES visos elektroniskās komercijas aspektos, un salīdzinājumā ar iepriekšējo gadu arī tiešsaistes komercdarbība nav uzlabojusies. 2015.gadā Latvijā tikai 8,3%, bet Polijā 9,6% MVU tirgojās tiešsaistē (ES 16%).

DESI 2016 Digitālo publisko pakalpojumuaspektā Latvija ierindojas 14.vietā, bet Polija 15.vietā no 28 ES dalībvalstīm. Latvijā 36%, bet Polijā 22% interneta lietotāju aktīvi izmanto E-pārvaldi (ES 32%).

Vērtējot DESI 2016 Latvijai un Polijai sniegumus atsevišķos aspektos var secināt, ka Latvija, salīdzinot ar Poliju, uzrāda augstāku sniegumu šādos aspektos: savienojamība, interneta lietošana un digitālie publiskie pakalpojumi.

Elektroniskās komercijas attīstība Latvijā ir pārāk lēna un var bremzēt valsts izaugsmi. Eksperti skaidro, ka rezultāti ir tik zemi, sakarā ar to, ka Latvija nav pratusi izmantot infrastruktūras priekšrocības.

Latvijas Informācijas un komunikācijas tehnoloģijas asociācijas (LIKTA) prezidente S.Bāliņa uzskata, ka "IKT nozare kļuvusi izteikti horizontāla, tai jau automātiski jāintegrējas ar citu nozaru procesiem. Tomēr uzņēmumu vadītāji bieži vien nenovērtē IKT potenciālu viņu biznesa attīstības veicināšanā, tāpēc viens no LIKTA mērķiem ir digitālās ekonomikas veicināšana. Svarīgi radīt pareizu izpratni par IKT jomu un tehnoloģijām kopumā. Latvijā ir labi attīstīta IKT infrastruktūra, taču pietrūkst zināšanu, kā to izmantot uzņēmējdarbībā" (Pētījums..,2016).

2016. gada EK DESI dati (Download Scoreboard reports, 2016) atklāj, ka gandrīz puse (48%) Latvijas iedzīvotāju iepērkas internetā, taču vietējie uzņēmumi to neizmanto - preču un pakalpojumu pieejamību digitālajā vidē nodrošina tikai 8,3% uzņēmumu. Tas nozīmē, ka Latvijas iedzīvotāju nauda par pirkumiem aizplūst un veicina digitāli attīstītāko valstu -ASV, Japānas un Dienvidkorejas - ekonomiku. Lai gan kopumā ES pārdošana tiešsaistē ir attīstītāka, situācija ir līdzīga - vidēji 68% iedzīvotāju iepērkas internetā, bet savus pakalpojumus digitālajā vidē piedāvā vien 16% uzņēmumu.

Situācija Latvijas MVU aktivitātē elektroniskās komercijas jomā tiek vērtēta kā kritiski zema. „Latvijas uzņēmumi atpaliek no ES visos e-komercijas aspektos, un, salīdzinot ar 2014.gadu, tiešsaistes komercdarbība nav uzlabojusies. E-komercija Latvijā arvien vēl ir maz izplatīta – tikai 38% iedzīvotāju tiešsaistē iegādājas preces vai pakalpojumus (ES vidējais rādītājs ir 53%). Patērētāju uzticēšanās pašmāju un ES tiešsaistes tirgotājiem ir zemāka nekā vidēji ES. Turklāt tikai 8% Latvijas MVU 2015.gadā tirgojās tiešsaistē. ES šis rādītājs ir 16 procenti" (Helmane, 2016)

2016. gada sākumā 44% iedzīvotāju vismaz reizi gadā bija iepirkušies internetā, un salīdzinājumā ar 2015.gada attiecīgo periodu šis rādītājs ir audzis par sešiem procentpunktiem, liecina Centrālās statistikas pārvaldes dati, turklāt pieaugums ir vērojams pilnīgi visās vecuma grupās, kā arī dalījumā pa dzimumiem. Neapšaubāmi iepirkšanās procesam internetā ir savi plusi. Neviens mazumtirdzniecības veikals nevar piedāvāt tik plašu preču sortimentu, kā ir iespējams apskatīt un nopirkt interneta veikalā, piemēram, 220.lv šobrīd ir pieejami vairāk nekā 105 tūkstoši preču dažādās kategorijās, sākot no elektronikas, kosmētikas, mājsaimniecības un bērnu precēm līdz pat auto piederumiem un precēm mājas remontam un iekārtošanai. 1a.lv nopērkami vairāk nekā 80 tūkstoši dažādu preču, un tuvāko trīs mēnešu laikā plānots paplašināt preču klāstu līdz 100 tūkstošiem. Ņemot vērā maksāšanas veidu izvēli un iepirkšanās drošību (saskaņā ar likumdošanu par preču atdošanu, garantijas apkalpošanu utt.) internetā un faktu, ka vadošie interneta veikali ir spējuši ievērojami uzlabot IT sistēmas un loģistiku, piegādes iespējas tai pašā vai nākamajā dienā, nozares līderu turpmākai izaugsmei ir ielikti stabili pamati (Skreija, 2016)

Digitālo tehnoloģiju prasmju izmantošana ikdienas darbā ir problēma Latvijas MVU vidū un rada digitālo plaisu, īpaši starp pilsētām un reģioniem, secināts ES DESI pētījumā. Lai to mazinātu un pilnveidotu komersantu IKT prasmes reģionos, Latvija iesaistījusies Eiropas starpreģionu sadarbības programmā. Vides aizsardzības un reģionālās attīstības ministrija pirmoreiz izveidojusi projektu, kas attīsta mazo un vidējo komersantu IKT prasmes (Helmane, 2016).

Pamatojoties uz rakstā veikto analīzi, autores secina, ka uzņēmēji vēl pilnībā nenovērtē elektroniskās komercijas nozīmi biznesā. Autores uzskata, ka pārdošana un iepirkšanās internetā jeb elektroniskā komercija Latvijā kļūs arvien pieprasītāka, ko varētu sekmēt Vides

aizsardzības un reģionālās attīstības ministrijas (VARAM) īstenotais projekts "Atbalsts IKT zināšanu kapacitātes paaugstināšanai MVU, veicinot izaugsmi un inovācijas", kas paredz dažādu pasākumu īstenošanu, iespējams, seminārus, apmācības, informatīvo materiālu izdošanu u.c., lai pilnveidotu MVU komersantu IKT prasmes reģionos. Arī Polijā mazo un vidējo uzņēmumu darbībā būtu ieteicams aktīvāk izmantot sociālo mediju iespējas un paaugstināt sniegumu DESI, īpaši savienojamības un tiešsaistes pakalpojumu izmantošanas rādītājos.

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STRATEGIC PYRAMID FOR DIVERSIFIED ENTERPRISE

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Abstract. The need for the development of simple and complex strategic pyramids has been grounded in the article. This is connected with the division of diversified enterprises into strategic business units and business units that caused the formation of different types of strategies at every hierarchy level (corporate, business, functional and operating). The possible options of the strategic set for each type of a pyramid have been discussed and the essence of the strategies of all levels has been specified.
Keywords: strategy; pyramid; hierarchy; structure; diversified; simple; complex.

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Introduction

Within the framework of the external and internal environment dynamics an effective activity of diversified enterprises depends significantly on the properly chosen strategic direction of development supported by a set of strategies which constitute its strategic pyramid. The strategic pyramid should be understood to mean a set of strategies of different levels (corporate, business, functional and operating) interrelated by hierarchical relationships of subordination and conformance which together constitute a strategic set of an enterprise.

A classic strategic pyramid is developed for a diversified enterprise which consists of several strategic business units. A strategic business unit, at that, is interpreted as a division within a firm, an organizational unit which plans its work independently (choosing types of activity, developing competitive products, etc.), determines strategic positions of an enterprise in one or several areas of business and has certain stakeholders (consumers, competitors and public organizations) and its own director responsible for the results of the SBU activity to the company owners.

The studies confirm the economic expediency of dividing a diversified enterprise into strategic business units (SBU) and business units (BU) (*Kozyk, Zalutska, 2016).* According to which a strategic business unit is interpreted as a separate division of a company which produces one or several products with similar characteristics, has its own possibilities for future increase of production and profitability, corresponds to the general direction of the business development and hedges against risk of losing long-term competitive advantage by means of the rest of business units which provide and support the activity of strategic business units in particular and of company in general.

According to this the structure of a diversified enterprise can be as follows:

- simple - one SBU and several BU;
- combined - several BU and several SBU;
- strategically oriented - several SBU and one BU;
- strategic - all SBU.

A classic strategic pyramid, thus, is developed for diversified enterprises with a strategic structure.

In case of a simple, combined and strategically oriented structure of diversified enterprises, the activity of business units is basically aimed at supporting and providing the activity of a strategic business unit. The activity of the strategic business unit in its turn is aimed at achieving the general goal of existence of the enterprise. Thus, a certain pyramid appears at the corporate level and a pyramid in the pyramid emerges. This requires conducting a research concerning the possibility and necessity of changes in the structure of a strategic pyramid of a diversified enterprise.

Research results

The strategic pyramid for the following enterprises (Fig.1) is widely covered in scientific literature (Saienko, 2007; Mishchenko, 2004; Ponomarenko, Afanasiev, Hontareva, 2013; Andrushkiv, Maliuta,, Andrushkiv, Melnyk, 2010; Honchar, 2015):

- single-business (non-diversified) companies – this pyramid consists of three levels at which the following strategies are developed: corporate strategy which is competitive at the same time, functional and operating strategies;
- multi-business (diversified) companies – corporate pyramid which is portfolio at the same time; competitive, functional and operating strategies.

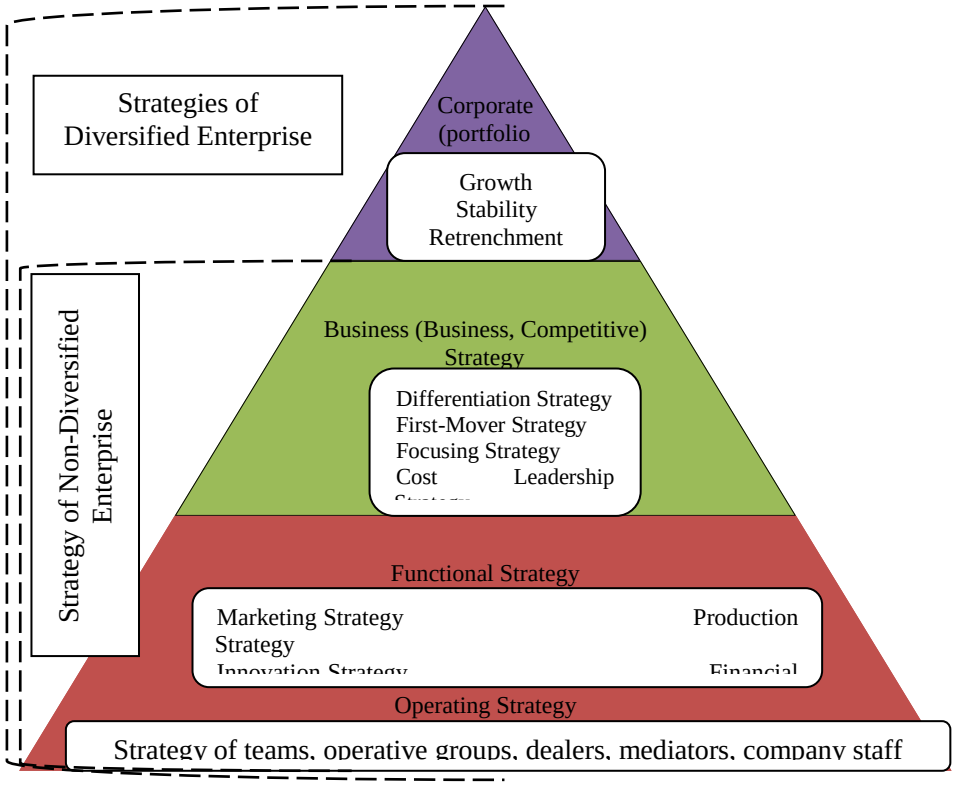

Fig.1. Strategic Pyramid of Enterprise
(formed by the author according to the research results)

Besides, one of the following basic development strategies is formed at the corporate level for a single-business company as well as for every business of multi-business company: growth, stability and retrenchment. This results from interpreting the corporate strategy as a strategy which describes a general direction of business development according to the stages of its life cycle (growth, stabilization, retrenchment).

Methods for the implementation of:

- growth strategy is business expansion by means of intensification (concentration of effort and possibilities on improving the existing product or strengthening positions in the existing market), integration (consolidation with other business structures), diversification (product expansion, entry into new market sectors);
- stability strategy – goal definition at the achieved level adjusted for inflation;
- retrenchment strategy – liquidation of company, "harvesting", downsizing part of a company, cost reduction, etc.

The following basic competitive strategies are built at the business level: cost leadership; focusing; best cost; differentiation; first-mover.

The main methods of achieving the competitive advantage using the strategy of:

- cost leadership is a constant search for the ways to reduce costs without quality loss and deterioration of the product main characteristics;
- differentiation – creation of successful purchasing value by providing products with the characteristics (distinctive features), the use of which will guarantee the satisfaction of consumers' specific needs (demands) at the expense of cost saving (namely, lower total costs or higher efficiency) and advantages which are not based on cost savings;
- focusing – deep specialization of enterprise focusing efforts on one market segment, certain product and buyer groups and low costs;
- first-mover – search for ways, possibilities and ideas to produce new products as well as consumers for them.

A set of strategies of functional subdivisions are formed at the functional level according to each strategy of the business level. The following strategies can refer here: marketing; production; innovation; financial, personnel; management; ecology, etc.

The following factors affect the formation of functional strategies:

- marketing strategy – requirements of corporate, competitive and functional strategies of enterprise; current market conditions; competitors' behaviour; growing consumer demands and needs; development of dealer networks, representative offices, small-scale wholesale stores, etc.;
- production strategy - requirements of corporate, business and functional strategies, especially marketing; available resources, their quality and sources of replenishment in the long term; agreements, orders for goods; technology level and upgradability; high level of management personnel and labour force and possibilities of its improvement; flexibility of productions, fast change-over to new products of different quantity and quality; management organizational structure and culture; natural factors – geographical environment etc. (Saienko, 2007: 255-256);
- financial strategy - requirements of corporate, competitive and functional strategies of enterprise; insufficient level of monetary policy; low efficiency of fiscal policy; high polarization in incomes;
- innovation strategy - requirements of corporate and competitive strategies of enterprise; marketing research which gives generalized consumer demands to goods; sharp change of environment, competitors' "technological breakthrough", etc.;

- personnel strategy - requirements of corporate, competitive and functional strategies of enterprise; change of enterprise operation conditions; development of science and technology; new management systems; high unemployment; commercialization of education and science, etc.

The operating strategy corresponds to the operating level. This strategy determines how to control the key organizational subdivisions (plants, sales and purchase departments) and performance of operative tasks (purchase of material and technical resources, inventory control, repairs, transportation) (Thompson, Strickland, 1998: 83).

Taking into consideration the peculiarities of formation, methods of use and factors of impact on the strategies of different levels, a strategic pyramid can be developed by two methods "top-down" and "bottom-up".

As the research showed, however, there is no unity of academic view concerning the distinguished strategy types which resulted in different interpretation of the essence and content of corporate and business strategies.

Some authors, for example (Kuznetsov, Rozhkov, 2000; Markova, Kuznetsova, 1999; Tulenkov, 1997), identify the corporate strategy with the portfolio one; others on the contrary distinguish both the general corporate and portfolio strategies (Herasymchuk, 2000).

Since the corporate strategy (being business strategy for non-diversified companies) describes a general direction of business development and "consists of actions, used for strengthening its positions, and approaches" (Pastukhova, 2002; Filyppova, 2015), it is quite correct to call it portfolio. In this case only strategies formed at this level for diversified enterprises with different structure will be distinguished.

For example, a diversified enterprise with strategic structure consists only of strategic business units, the activity of which is aimed at achieving a single strategic direction or growth, or stability, or retrenchment, but by means of different methods of product differentiation, reduction of production costs, focusing on a certain market segment, etc. For the diversified enterprises with such structure, therefore, it is required to form the portfolio strategy of growth, stability or retrenchment at the corporate level while at the business level the strategies of cost leadership, differentiation, focusing, etc. should be formed for each strategic business unit (SBU) (fig.2). Each of the chosen business strategies is enforced with a set of relevant functional strategies. Within the framework of functional strategies the strategies of operating level are formed, the necessity of which is caused by the need to get relevant tasks and possible benefits from its performance to direct executors. This is a simple or classic strategic pyramid.

The suggested structures of strategic pyramids require specification of the essence of portfolio, business and functional strategies for each of them.

Thus, portfolio strategy for:

- simple strategic pyramid is a general strategy for a diversified enterprise which is developed at the corporate management level and determines a specific composition and structure of strategic business units (SBU), effective (synergetic) interrelations and methods of resource distribution between them;

- complex strategic pyramid is the strategy for a diversified enterprise which is developed at the corporate management level and determines a general business line reflected in the strategies of its strategic business units (SBU).

Business strategies for:

- simple strategic pyramid is a set of actions and approaches aimed at providing an effective activity in one specific business area (Mishchenko, 2004);

- complex strategic pyramid are the strategies subject to the corporate strategy, show the ways of achieving the direction chosen by it in strategic business units (SBU) and ways (directions) of development, specific role, sizes, methods of allocating resources of each business unit (BU) in order to support an effective implementation of the chosen direction for business development in general and of strategic business units (SBU) in particular.

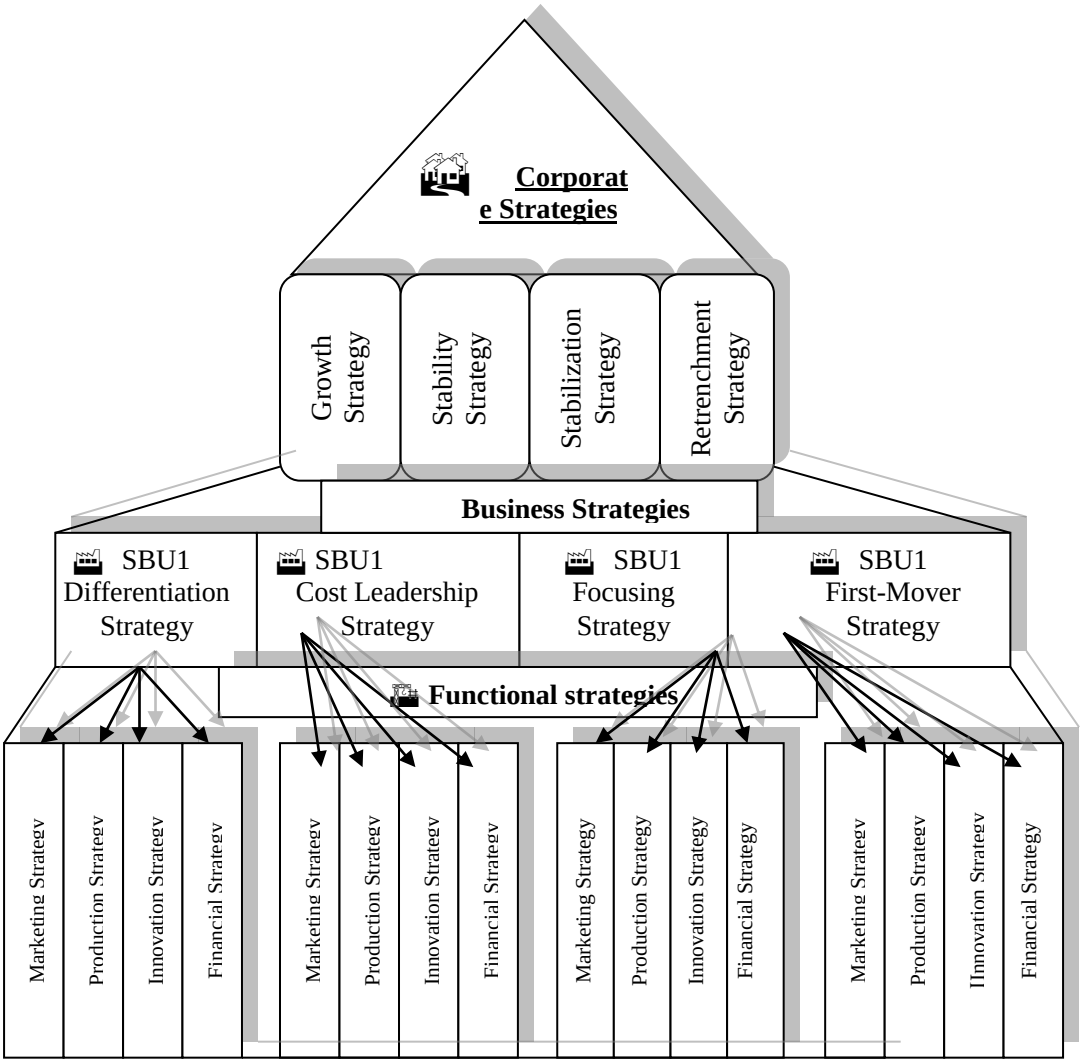

Fig.2. Simple Strategic Pyramid (own development)

For the rest diversified enterprises (with simple, combined and strategically oriented structure) it is expedient to form a complex strategic pyramid (fig.3). Its peculiarity is that at the corporate level the strategy of a general direction of business development is formed which is reflected in the strategy of every SBU. It can be the strategies of winding-up and liquidation; restructuring; recovery and economy; multinational diversification strategies, etc.

When forming a complex strategic pyramid for business units of a diversified enterprise, the strategies of growth, stability and retrenchment mutually agreed with the portfolio strategy are developed at the business level. The competitive strategies for certain areas of a relevant company business are also formed at this level of a complex strategic pyramid (BU). At that, a set of functional strategies can be developed, if required, both for each business line separately and for each business unit (SBU and BU) in general.

Functional strategy:

- management plan of actions of a separate subdivision dealing with a specific business area (Mishchenko, 2004: 218).

- combination of actions and approaches required to provide the accomplishment of strategic measures of the business strategy within a certain subdivision of a specific business area or of a strategic business unit and business unit in general.

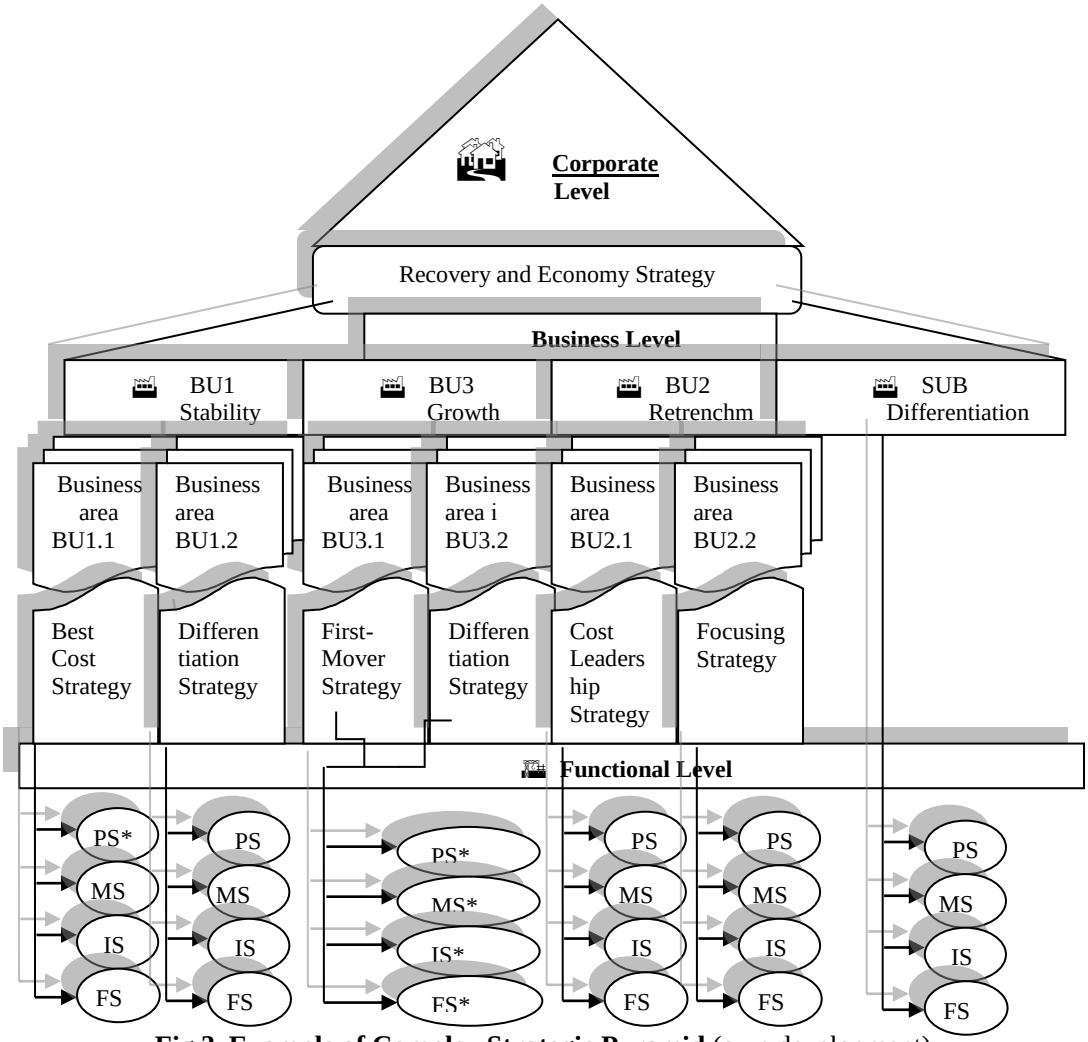

Fig.3. Example of Complex Strategic Pyramid (own development)

*PS - Production Strategy; MS - Marketing Strategy; IS - Innovation Strategy; FS - Financial Strategy

A strategic set of diversified enterprises even with similar structure of SBU and BU, however, will be different because of a different list and content of strategies of every level which depend on the state of external and internal environment as well as views of company top management.

"Zakhar Berkut" ski resort, which in 2009 became a diversified enterprise with strategic structure by having selected the horizontal diversification strategy, can be taken as an example. It consists of the following strategic business units (Zakhar Berkut: Ski Resort and Hotel and Tourist Complex in Slavske, n.d):

- SBU1 "sports and tourism complex" offering ski equipment rental services; special services (snowmobile riding, instructor services); ropeway services;
- SBU2 "transport services complex" offering services of everyday transfer of tourists on "Slavske – "Zakhar Berkut" route;
- SBU3 "hotel complex" – accommodation services; additional services (recreation services (sauna; hot tub; massage; gym; barbeque; gazebos); business services (conference hall; access to the Internet; telephone line for UTEL cards); personal services (hairdressing services; clothes washing and ironing; shoe cleaning; medical services; safe deposit services); entertainment services (indoor swimming pool; sightseeing programs; nightclub; horse riding; children's playroom and playground; darts; mountain bikes rental; billiard; gaming machines; table tennis);
- SBU4 "food services complex" – restaurant, bars and cafés services.

Thus, in 2009 the ski resort chose the portfolio growth strategy enforced by the following business strategies for:

SBU1 differentiation strategy;
SBU2 first-mover strategy;
SBU3 best cost strategy;
SBU4 differentiation strategy.

The activity of SBU1 "sports and tourism complex", however, largely depends on weather conditions and even the use of synergetic strategic set in 2012 which provided for the synergy (enhancement) at all levels of strategy hierarchy did not help to fully implement the planned strategic measures of the growth strategy for this strategic business unit.

The possibility of alternate switching-off and moving employees from one surface lift to another became an efficient solution to seasonality of the services of this strategic business unit. In other words, the "sports and tourism complex" business unit required the use of another general strategy which was not the growth one. The same also referred to other business units of this resort. For example, the range of services of the "food services complex" business unit, which apart from the restaurant also includes fast food facilities located at the terminals for intermediate lift, was severely reduced with the end of the season. The reduction of the scope of services of this business unit was higher than of the sports and tourist complex facilities, which is connected with the hotel and ropeway running through these food facilities.

Thus, till 2012 "Zakhar Berkut" ski resort formed a simple strategic pyramid and after 2012 started to use a complex strategic pyramid, "hotel complex", at that, remained a strategic business unit and the rest became business units.

The portfolio strategy of "Zakhar Berkut" ski resort – growth –manifested itself at the business level in the differentiation strategy for the "hotel complex" strategic business unit which was implemented by constructing a complex of cottages, gazebos and swimming pool in the territory of the resort. The "sports and tourism complex" business unit used the

retrenchment strategy and while the "food services complex" and "transport services complex" business units used the stability strategy.

The following strategies were applied to business areas of each BU at the business level:

- to "ski equipment rental services" area of the "sports and tourism complex" business unit 1 – best cost strategy;
- to "special services" area of BU1 – cost leadership strategy;
- to "ropeway services" area of BU1 – focusing at low cost strategy;
- to "transport services complex" business unit 2 – differentiation strategy by using new types of transport and conducting different types of excursions;
- to cafés and bars – best cost strategy;
- to restaurant – first-mover strategy.

Together all components of "Zakhar Berkut" ski resort ensured the implementation of a general strategy of growth, because even if one of the business units would be missing, the scope of services of the hotel complex would be significantly lower (as evidenced by the range of services of this resort in 2007 when only the hotel was working (Business Plan of "Zakhar Berkut" Ski Resort Development, 2004)).

Conclusions and suggestions

The division of a diversified enterprise into strategic business units and business units, their structure and interrelations caused the necessity of constructing complex and simple strategic pyramids. A simple strategic pyramid is intended for enterprises with strategic structure (all business units being strategic); at the corporate level it includes growth, stability and retrenchment strategies and at the business level it comprises cost leadership, differentiation, focusing, first-mover and best cost strategies. The functional level for both pyramids consists of the same strategies: marketing; production; financial; innovation, etc. The difference in the set of functional strategies is that in a simple strategic pyramid a set of functional strategies is developed within the framework of a certain business strategy while in a complex strategic pyramid – within the strategy of a certain direction of a relevant strategic business unit and business unit in particular and within these SBU and BU in general.

A complex strategic pyramid is developed for diversified enterprises with a simple, combined and strategically oriented structure. According to this pyramid the following strategies are developed at the corporate level: winding-up and liquidation; restructuring; recovery and economy; multinational diversification strategies, etc. At the business level the growth, stability and retrenchment strategies are formed for every business unit while the cost leadership, differentiation, focusing and first-mover, etc. strategies are formed for every strategic business unit and every direction within a specific business unit.

The suggested structures of strategic pyramids caused the need to specify the essence of strategies at different levels.

The formation of the behavior strategy of "Zakhar Berkut" ski resort in the market confirmed the necessity of building simple and complex strategic pyramids.

The construction of a strategic pyramid for a diversified enterprise according to the given recommendations will ensure an efficient development of an enterprise as an integral structure, increase of its long-term competitive advantage as well as capturing and holding strong positions in the market.

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THE ANALYSIS OF THE TRANSPORT SYSTEM IN DNIPROPETROVSK REGION

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Abstract. The article studies and analyzes indicators of all types of transport services in Dnipropetrovsk region, namely,freight traffic activity, supply turnover, passenger transportation, passenger turnover androute density by different transport modes.The analysis was carried out in 2005-2015 in districts and cities of the region and the place of the region in the transport sector of Ukraine is analyzed. The recommendations on priority directions of developing transport sector in Dnepropetrovsk region are proposed.

Keywords: transport, modes of transport, transport infrastructure, freight traffic activity, supply turnover, passenger transportation, passenger turnover, route density.

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Introduction

The developed transport system of the state provides conditions for the socio-economic development, improves the production efficiency, national economy and people's welfare. The territory of the country or region must have such a transportation infrastructure that would fully satisfy demand for transport services.

Dnipropetrovsk transport system is an important part of transport communication in the country. It provides the needs of the population and social production in the transportation of passengers and goods. This is a sphere of functioning of a significant number of business entities, both legal entities and individual entrepreneurs.

The transport system must meet high requirements on quality, regularity and reliability of transport links, cargo safety condition and passenger transportation safety, deadlines and cost of delivery corresponding to the European integration of Ukraine.

The analysis of the transport system in Ukraine, its advantages, disadvantages and ways of development were highlighted in the works of various scholars, including S.G. Frysheva, I.I. Melnyk, S.M. Bondar, O.G. Topchiev, V.L. Mokriak, G.A. Levykov, O.G. Dykan and others. However, this issue is urgent and requires a thorough study.

Determination of Dnipropetrovsk region transport in frastructu restatus, the identification of weaknesses and development prospects

Dnipropetrovsk region, an area of 31.9 thousand squire kilometers and a population of 3560.0 thousand people (representing 7.5% of the population of Ukraine), is located in the central part of Ukraine on the banks of the middle reaches of the Dnieper River crossing the region from the northwest to the southeast and almost divides it into equal parts.

The administrative-territorial division of Dnipropetrovsk region is 20 cities, including 13 cities of regional importance, 22 districts, 46 towns, 1435 rural settlements, 287 villages and 40 village councils.

Through freight and passenger transportation in the region there is an interaction of different modes of transport forming the transport system: air, rail, pipeline and river transport for long distances, municipal electric transport lines and subway.

Despite placing the regional center close to the geographical center of the region, because of the territory elongation, the internalavailability index of the region is well below the average in Ukraine (0.80).The region has an extensive transport network.A number of districts, including such as Pokrovsky, Mezhivskyy, Tomakivsky, Apostolovsky, and Shyrokivsky are too far from the regional center which is an additional obstacle to their development. In the region Donbas black coal, Kryvorizhzhiairon ore and Nikopolmanganese ore are mined which are the largest ore deposits not only in Ukraine but also in Europe.

Kryvbas provides benefits and influences the development of the transport system of other cities and districts of the region. It performs quasi metropolitan functions in the southwestern part of the region, Shyrokivsky, Apostolovsky and Sofiivsky districts are geographically connected to it.

In the structure of the transport sector of the region there are almost all types of transport developed in Ukraine: air, railway, road and river transport. The purpose of the article is an analysis of the transport system in Dnipropetrovsk region.

Railway transport. Railways in Dnipropetrovsk region are the heaviest traffic in Ukraine. By the density of railways and rail infrastructure qualityit holds the leading positions among the Ukrainian regions. The operational length of railways of general use is1560 km, including electrified ones (1250 km).The density of a railway trackper 1 thousand square kilometers in the region is 49 km (in Ukraine this indicator is 36 km), 83.4%railway tracks are equipped with the automatic control system of the traffic, 90% stations are equipped with the electric centralization of which more than 55% are joint less railway tracks. The transportation work is carried out by 244 stations, including 4 marshalling stations, 7 passenger stations, 67 freight stations and 19 line-network stations.

The region is crossed by main railway lines that connect Donbas, Kryvorizhzhia and Nikopol.

Dnipropetrovsk region has a huge potential for the passenger transportation by rail. The region is crossed by two major trends “East” – “West” combining Donbas and the south of the Russian Federation with the west of Ukraine, Kyiv and Europe and “North” – “South” combining Slobozhanschina and Moscow with the south of Ukraine.

Railways of Dnipropetrovsk region are: Oleksandria - Piatikhatki - Verkhivtseve - Dnipro - Synelnykove– Chaplyne – Krasnoarmiysk, Lozova - Pavlograd - Synelnykove-Zaporizhzhia, Piatikhatki - Kryvyi Rig - Apostolove - Nikopol -Zaporizhzhia, Snigurivka - Apostolove-Zustrichnyi, Novomoskovsk- Krasnograd, Dolynska - Kryvyi Rig - Verkhivtseve, Chaplyne-Pology, Novomoskovsk - Pavlograd - Krasnoarmiysk, Baglii - Kamianske - Balivka - Novomoskovsk, Dnipro - Sukhachivka.

Not all railways of the region are electrified. Areas Snigurivka - Apostolove-Zustrichnyi, Novomoskovsk - Krasnograd and Chaplyne-Pologyare not electrified. In areas of Prydniprovsky and Donetsk railways there is a constant current, only beginning from Piatikhatki-Stykova towards Oleksandria there is an alternating current.

In 2005-2015 railway passenger turnover decreased from 3644.8 to 2409.9 million passengers per km, respectively, dispatching cargo by rail increased from 88.9 to 90.5 million

tons, freight turnover decreased by 20.4 billion ton-kilometers (compared to 28.6 billion ton-kilometers in 2014). Almost half of all freights sent by railways are iron and manganese ore of Kryvyi Rig and Nikopol basins. Only 1/3 of ore (55.3 million tons) is for the internal freight transportation, another part of it is sent to metallurgical plants in Donbas and for export.The second place in the structure of cargo sent by Prydniprovska Railway is for coal (17.4 million tons) and others are ferrous metals (9.2 million tons).

As for the number of passengers Prydniprovska Railway is second only to South Western Railway of Ukraine (23.8% of total).

Railways of Dnipropetrovsk region comprise 106 stations. Dnipro Management of Rail Traffichas55 stations, Kryvyi Rig Management of Rail Traffichas 44 stations, Yasynuvata Management of Donetsk Railway has 3 stations, and Zaporizhzhia Management of Rail Traffic and Znamyanka Management of Odesa Railway have by two stations.

Passenger transportation by rail in 2005-2015 increased from 36.8 to 37.1 million representing 0.82%.All transport operations are performed by electric locomotivesВЛ8, ЧС7 and ЧС2 and diesel locomotives2Т3116, of which 95% for electric traction. The Ukrainian electric locomotivesДЕ1 of Dnipro Electric Locomotive Construction Plant are operated on the landfill of the railway. 12 locomotive and 14 wagon depots are engaged in repair and maintenance of rolling stock, track superstructure, technical facilities and equipment.

The railway transport provides the ability to relatively fast, regular and relatively low cost price of delivery of cargo and passenger traffic for long distances in all weather conditions.

Road transport. The road transport is the main type in providing freight and passenger traffic. Almost all the inhabited localities are connected with roads. The largest passenger terminals are bus stations in Dnipro and Kryvyi Rig, as well as Verkhnodniprovsk, Kamyanka, Magdalinivka, Nikopol, Novomoskovsk, Pavlograd and Tsarichanka bus stations. Bus terminals and bus stations are in all cities and regional centers except Zelenodolsk, Shyroke and Yuriivka. Almost all bus stations merged into JSC "Dnipro Regional Enterprise of Bus Stations" that facilitates coordination between different carriers and passenger service.

On the region's territory there are the following highways:

1) Two highways of the international importance: Kyiv-Luhansk, Kharkiv-Sevastopol;

2) Three highways of the national importance: Boryspil - Zaporizhia, Dnipro - Nikolaev, Kropivnitskiy -Zaporizhia;

3) Three highways of the regional importance: Merefa-Pavlograd, Dnipro - Kobeliaky, Piatikhatki - Kryvyi Rig.

The length of the highways in the region is9144km, including 417 km of international roads, 442 km of national roads, 78.5 km of regional roads, 1900 km of territorial roads and 6357 km of local roads: 2689 km of regional roads, 3668 km of district roads and 653 bridges.

In 2005-2015 the length of public roads in Dnipropetrovsk region was from 9182.4 to 9172.0 km respectively, including paved roads (from 9175.6 to 9165.2 km). For the last three years their figures have been remained unchanged.

The use of the road transit potential of the region is complicated by significant road depreciation – 44% (the average indicator for Ukraine is 47%), poor quality of roads –3.10% (the average indicator for Ukraine is 3.29%) and a small number of first class roads - 3%.The density of all paved roads of a regional significance is 287 kilometers/ 1000 square kilometers which is lower than the average indicator in Ukraine.

The distribution of paved public roads by categories in 2015 is presented by the diagram in Figure 1. According to it, the largest percentage is for paved roads of category IV.

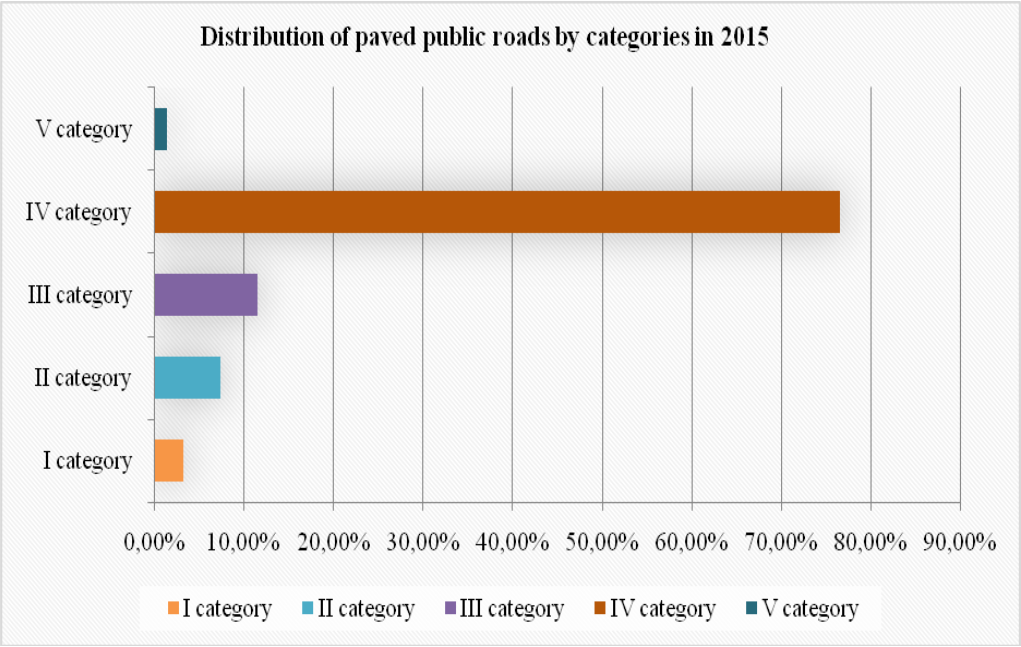

Fig. 1. Distribution of paved public roads by categories in 2015
(Information of Statistical Yearbook of Dnipropetrovsk region, 2015)

Dynamics of cargo transportation in Dnipropetrovsk region is presented in Figure 2.

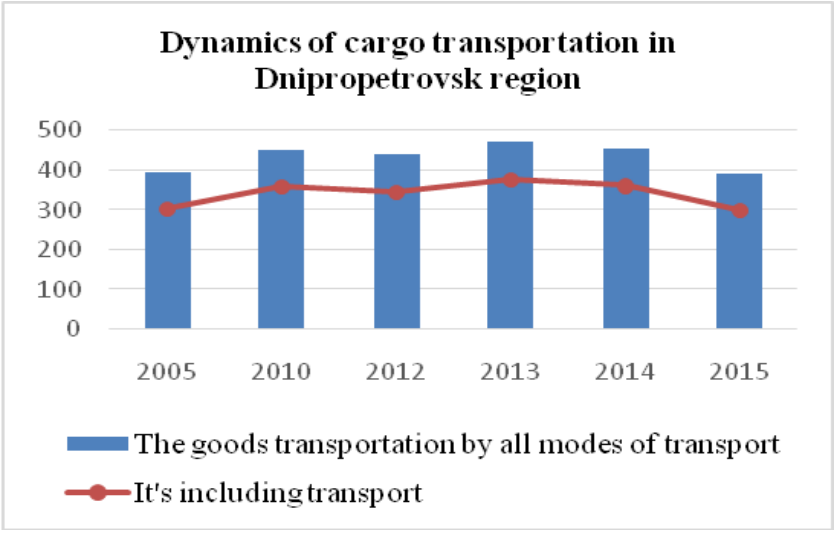

Fig.2. Dynamics of cargo transportation
(Information of Statistical Yearbook of Dnipropetrovsk region, 2015)

Auto carriers in 2015 transported 300.4 million tons of cargo and it was 17% less than in 2014. They are characterized by a total volume of cargo that is loaded and transported by the rolling stock of individual modes of transport. Indicators of freight turnover amounted to 3.6 billion ton-kilometers, respectively, and decreased by 4.1%.They are defined as the total volume of cargo transportation which is the sum of the products of the transported cargo over a transportation distance for each shipment.

Passenger transport services region in 2015 were used by 417.1 million passengers (which is 15% less than in 2014), 163.2 million passengers were transported (which is 38.4% less than in 2014) and the passenger traffic accounted for 6.3 billion passengersper kilometer (which is 17.5% less than in the previous year).

The largest cities and districts of the region engaged in the cargo transportation by motor transport in 2005-2015 are presented in Table1.The undisputed leader among them is the city of Kryvyi Rig. It increased freight from 78.5% to 81.1% and Kryvorizky district increased these figures almost 4 times. This allows us to conclude the development of volumes of iron ore transportation in the district.

Table1

Cargo transportation by motor transport in cities and districts of Dnipropetrovsk region

(Thousand tons)

	2005	***2010***	***2012***	***2013***	***2014***	***2015***
Dnipropetrovsk region	***303674.9***	***359200.7***	***345104.2***	***376121.6***	***361676.5***	***300356.8***
KryvyiRig	238461.8	299963.1	281868.5	304291.7	291810.9	243846.7
Vilnogirsk	23214.8	19947.5	23002.0	29212.2	25511.2	16392.3
Dnipro	6295.6	6479.9	8515.6	8097.2	7526.7	7229.7
Ordzhonikidze	9222.0	6865.0	6445.8	5595.7	6166.1	5148.1
Pavlograd	2229.8	1364.3	1848.9	1768.4	3697.6	2175.4
districts						
Dniprovskyi	1477.7	2382.1	3264.4	5783.5	6396.9	6762.7
Kryvorizky	351.3	293.8	381.3	494.6	395.2	1419.9
Novomoskovsky	1735.0	1330.6	1161.0	1408.1	1404.2	1341.6

Main Department of Statistics in Dnipropetrovsk region.http://www.dneprstat.gov.ua

Freight turnover of road transport in cities and districts in 2005- 2015 is shown in Table2.According to it, the primacy of freight turnover belongs to Dnipro (26.8%), Kryvyi Rig (25.2%) and Dniprovskyi district (17.5%).

For the statistical period Kryvyi Rig city took a leading position and gave way Dnipro city concerning freight turnover only in 2015. Dniprovskyi district increased freight turnover of road transportalmost 6 times for the same period.

Table2

Freight turnover of road transport in cities and districts of Dnipropetrovsk region

(Million ton-kilometers)

	2005	***2010***	***2012***	***2013***	***2014***	***2015***
Dnipropetrovsk region	***2180.6***	***3587.1***	***3738.0***	***3730.1***	***3798.3***	***3641.6***
Dnipro	762.6	703.2	999.8	906.4	896.9	977.6
KryvyiRig	633.5	1016.0	1133.9	1086.7	1066.5	918.6
districts						
Dniprovskyi	108.9	389.7	407.8	526.6	625.7	658.9
Kryvorizky	10.4	2.8	10.2	22.7	15.8	31.3
Nikopolsky	24.4	16.6	31.3	38.5	20.5	20.3
Novomoskovsky	25.3	30.7	23.8	27.0	30.2	28.2

Main Department of Statistics in Dnipropetrovsk region.http://www.dneprstat.gov.ua

Table 3 shows the largest passenger transportation by road transportin cities and districts of Dnipropetrovsk region and the city of Kryvyi Rig has 51.97%.Kryvorizky district ranked first among districts of the region. Absolute figures of it decreased from 3962.9 thousand to 2237.1 thousand for the statistical period. However, the percentage increased from 1.16 to 1.36 in the regional ranking.

Table3

Passenger transportation by road transport in cities and districts of Dnipropetrovsk region

(Thousand)

	2005	***2010***	***2012***	***2013***	***2014***	***2015***
Dnipropetrovsk region	***341420.8***	***347588.7***	***313854.6***	***316443.7***	***264926.5***	***163231.2***
KryvyiRig	105473.8	106447.9	130833.6	122786.6	130870.6	84837.0
Dnipro	142981.7	155313.9	130062.4	139868.9	82570.9	37639.0
Kamiansk	38771.0	36958.5	8599.7	9652.6	12001.4	11118.0
Nikopol	12246.8	15974.2	15641.2	17491.3	16560.3	10413.6
districts						
Kryvorizky	3962.9	2810.8	3646.6	3457.8	2929.5	2237.1
Apostolivsky	751.9	401.5	395.3	415.4	400.1	354.7

Main Department of Statistics in Dnipropetrovsk region.http://www.dneprstat.gov.ua

The road transport provides quick and mobile delivery of cargo and passengers for relatively short distances and for a short time.

Water transport. Dnipropetrovsk region has the main water artery of the country that is the Dnipro River, 55 rivers longer than 25 km and more than 100 small water reservoirs. There is freight traffic by public and private water transport which tonnagedecreased from 1524.2 to 419.7 thousand tonsfrom 2005 to 2015, respectively. In 2015, the cargo amount transported by water transport in the region was 419.7 thousand tons and freight operation amounted to 39.6 million tons per kilometer (which are 1.6 times and 2.4 times more than in 2014, respectively). Building materials and cerealspredominatein the carriage of goods. In the

region there are Dnipro, Dneprodzerzhinsk and Nikopol river ports. These ports, except Nikopol river port, carry out the international freight transportation with the access to the Black Sea by ships like "river-sea".

Dnipropetrovsk region (419.7 thousand tons) ranked second after Odesa region (1093.6 thousand tons) in cargo transportation by river transport in 2015among the regions of Ukraine.Unfortunately, in recent years, there is no passenger traffic at the state level and it coincides with the general trend in Ukraine. The passenger turnover of river transport has the lowest rate among all types of transport and it is 0.4 million passengers per kilometer.

Air transport. Air transport of the region is represented by two international airports in the cities of Dnipro and Kryvyi Rig. Airports of the regionare connected by airlineswith all major cities of Ukraine and a considerable number of foreign countries.Air traffic is made with Lviv, Kyiv, Ivano-Frankivsk; there are international connections to Verona, Sharm el Sheikh, Hurhada, Tel Aviv, Antalya, Istanbul and Tbilisi.Every day 2.516 passengerscan flyfrom airports.

In 2015 the number of passengers transported by air transport of the region was 135.1 thousand and it decreased by 13.5% compared to the previous year.

In 2015 1.2 tons of cargo were transported, the freight turnover amounted to 3.8 million tons per kilometer which respectively by 3.1 times and 3 times more than in the previous year.Freight turnover of air transport in the overall transport system of the region has the lowest indicator –1.3 million tons per kilometer (0.0004%). Traditionally, air transportis used to carry passengers.

Pipeline transport. Pipeline transport is important to Dnipropetrovsk region. It provides the area with oil, petroleum products, gas, coming from other regions.In the region's territory there are gas pipeline routes Shebelinka - Odesa – Dnipro, Kremenchug - Kryvyi Rig - Kropyvnytskyi, and Kremenchug - Kherson oil pipeline.These pipelines have a transit nature.

A significant share of the passenger traffic is taken by the urban passenger transport which is divided into tram, trolley transportand subway.

Dnipro subway is the shortest in Europe. It consists of only one line –Central Zavodska which has six stations. The length of the subway line is 7.1 km, the track width is 1.524 mm and the length of platforms is 102 m.Moving time one way is 14 minutes, the interval of train movements is from 10 to 16 minutes and inrush hours it is from 4 to 7 minutes.

Passenger transportation by subway in Ukraine is only in three cities of Kyiv, Kharkiv and Dnipro. In 2015 passenger transportation by subway increased by 8.2% compared to the previous period. Dnipro city has less than 12% (7950.1 thousand) passengers comparing with cities of Ukraine where there are subways.

In Kryvyi Rig there is only one high-speed tramin Ukraine which has a line of 18 km. Most lines of it are on the surface and have 15 stations. Four stations are underground, three stations are fully above ground and the others are above groundcovered. Due to the lengthening of the city from north to south, this type of transport is the fastest and economical.16% of the passenger traffic of Kryvyi Rig is made by the high-speed trambeing developed and it becomes more and more popular among different segments of the population.

The operational length of trolleybus lines in the length of publictraffic connectionsin the region is 445.6 km and the operational length of tram lines is 374.0 km.This is the lowest indicator in the length of public traffic connections in Dnipropetrovsk region. However, it is the cheapest type of the urban transport, as evidenced by the increase in passenger

transportation by trams and trolleybuses from 12.8% in 2014 to 17.7% in 2015.The fare is 2.5 hryvnas that is twice cheaper than travelling by road transport.

Dynamics of the passenger turnover by types of transport in 2005-2015 is presented in Table4 and Figure3.According to these data, in 2015 there was a significant decrease in passenger turnover by rail, road, air and river transport modes.There is a tendency of increasing passenger turnover by electric transport (trolleybus, tram and subway). This is due to the deteriorating of the economic situation and low income of the general population.

Table4

Passenger turnover by types of transport

(Million passengers per kilometer)

Type of transport	***2005***	***2010***	***2012***	***2013***	***2014***	***2015***
Total	***11383.8***	***10390.5***	***9082.1***	***9272.9***	***7663.2***	***6325.2***
Railway	3644.8	3581.8	3624.6	3554.9	2597.1	2409.9
Automotive (buses)	5098.0	4677.8	4106.2	4413.4	3719.3	2404.1
River	1.4	–	0.3	0.6	0.4	0.4
Air	110.2	744.5	44.3	89.1	120.4	109.2
Trolleybus	893.7	398.4	427.4	383.9	388.7	457.9
Tram	1572.8	944.2	840.3	795.0	802.0	905.5
Subway	62.9	43.8	39.0	36.0	35.3	38.2

Main Department of Statistics in Dnipropetrovsk region.http://www.dneprstat.gov.ua

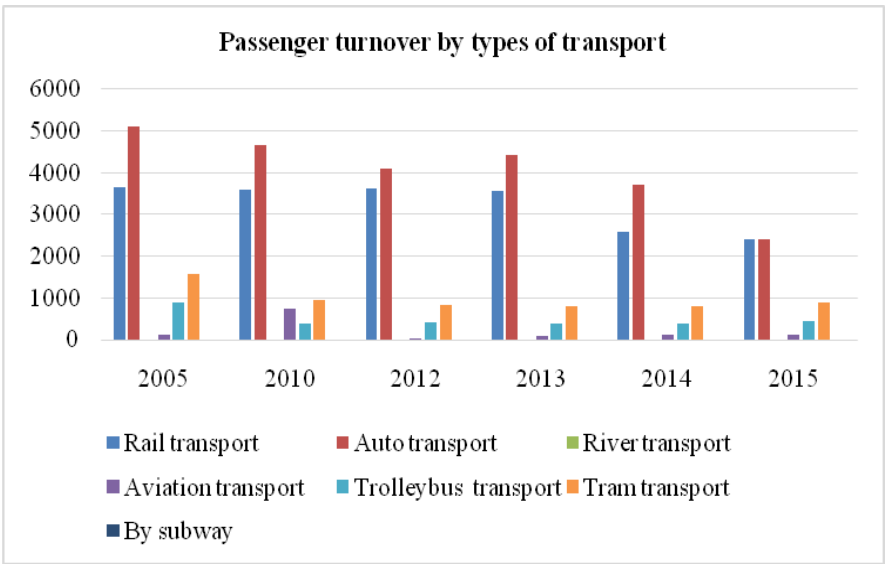

Fig. 3. Passenger turnover by types of transport (Information of Statistical Yearbook of Dnipropetrovsk region, 2015)

According to Table5, in 2015 there was a significant fall in freight turnover of main types of transport in the region. However, the railway was impaired the most significantly as the main carrier of industrial products which reduced the freight turnover by almost three times due to the fall of the Ukraine's economy.

Table5

Freight turnover by types of transport

(Million tons per kilometer)

Type of transport	***2005***	***2010***	***2012***	***2013***	***2014***	***2015***
Total	***37660.2***	***35984.6***	***38578.1***	***37332.8***	***32423.2***	***24097.3***
Railway	35316.8	32319.7	34751.4	33520.8	28606.9	20412.3
Automotive	2180.6	3587.1	3738.0	3730.1	3798.3	3641.6
River	149.4	62.8	84.6	75.9	16.7	39.6
Air	13.4	15.0	4.1	6.0	1.3	3.8

Information of Statistical Yearbook of Dnipropetrovsk region, 2015

Conclusions and suggestions

In the system of the sustainable development of Ukraine Dnipropetrovsk region transport plays an important role. The transport system of the region is an integral part of the industrial infrastructure of the national economy. Also, it provides the necessary conditions for the development of other sectors of the material production and sectors of the non-production sphere.

Based on the analysis conducted in the article, we propose the following priority areas of the transport sector in Dnipropetrovsk region, namely:

- The development of transport communications in the region – the formation of the international road transport corridor between Europe and Asia with concomitant infrastructure for the following administrative districts of Dnipropetrovsk region: Vasylkivsky, Kryvorizky, Krinichansky, Mezhivsky, Pokrovsky, Piatykhatsky, Sinelnykivsky, Soloniansky, Sofiivsky;
- Strengthening and development of international highways, construction of by-pass roads, strengthening of main sectors of the railways;
- Improvement of the railway infrastructure;
- Development and modernization of airports and river ports;
- Reconditioning and renewalof the rolling stock.

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THE SOCIAL AND ECONOMIC FACET OF A NETWORK ECONOMY

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Abstract. The paper discusses issues devoted to the social and economic facet of a network economy. It starts from a description of a crucial social and economic problem that troubles contemporary free market economies which is an unemployment issue. In a introductory section of the paper, some definitions and various approaches to unemployment are presented. Next some social and economic aspects of unemployment are discussed. Then some basic worldwide management philosophies are presented connected with primary patterns of existed job markets. Then a philosophy of a network economy is described as the one that may deal efficiently with some earlier outlined problems.

Keywords: job market, unemployment, management philosophy, network economy

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Wprowadzenie

Badania nad funkcjonowaniem rynku pracy i wykorzystaniem siły roboczej są obecne w całym okresie rozwoju teorii ekonomii. W celu redukcji tego zjawiska formułowane są także wskazówki i postulaty pod adresem polityki gospodarczej. Zjawisko bezrobocia należało do najbardziej palących problemów społecznych XX wieku i wiele wskazuje na to, że również wiek XXI niewiele zmieni w tym względzie. W całym okresie XX wieku zjawisko to towarzyszyło procesom rozwoju gospodarczego, choć jego skala podlegała silnym wahaniom. W okresie kryzysu lat trzydziestych w wielu rozwiniętych krajach bezrobocie przekroczyło 25% ogólnych zasobów siły roboczej (Kwiatkowski, 2002:7). Później przez prawie czterdzieści lat kształtowało się na relatywnie niskim poziomie aby w latach osiemdziesiątych i dziewięćdziesiątych zwiększyć znacznie swe rozmiary oraz skalę, dotykając także kraje przechodzące transformację systemową w kierunku gospodarki rynkowej. Przez cały wiek XX zjawisko bezrobocia znajdowało się w centrum debat społecznych, ekonomicznych i politycznych. Jak się wydaje nadal przyciąga i będzie przyciągać uwagę szerokiej opinii publicznej ponieważ różnorodne i dalekosiężne skutki bezrobocia są odczuwalne zarówno przez osoby bezrobotne jak również przez całe społeczeństwa. Skutki te z kolei mają swój wymiar zarówno ekonomiczny jak również społeczny, zwłaszcza socjologiczny i psychologiczny.

Ekonomiczne ujęcie bezrobocia

Pierwsze całościowe próby interpretacji bezrobocia pojawiły się na gruncie tradycyjnej ekonomii neoklasycznej, ale już w ekonomii klasycznej wykorzystanie zasobów siły roboczej stanowiło ważny kierunek analizy[1]. Od tamtych czasów badania nad funkcjonowaniem rynku pracy i wykorzystaniem siły roboczej są obecne w całym okresie rozwoju teorii ekonomii.

[1] Do określania bezrobocia używano wówczas terminu „nadmiar ludności".

Podejmowane są próby zrozumienia istoty bezrobocia, form jego przejawiania się, przyczyn jego powstawania i mechanizmów utrwalania się. W celu redukcji tego zjawiska formułowane są także wskazówki i postulaty pod adresem polityki gospodarczej. Bezrobocie można analizować w kategoriach zasobowych oraz strumieniowych. W ujęciu zasobowym odzwierciedla ono pewien stan tego zjawiska i jest opisywane jako różnica pomiędzy iloczynem współczynnika aktywności zawodowej [2] z ludnością w wieku produkcyjnym a liczbą zatrudnionych (Milewski, 2005:534). Współczynnik aktywności zawodowej zależy przede wszystkim od poziomu i zmiany stawek płac, preferencji w zakresie kształcenia, modelu rodziny, a także od możliwości znalezienia pracy. Liczba ludności w wieku produkcyjnym z kolei od czynników demograficznych, zwłaszcza stopy urodzeń we wcześniejszych latach, ale także od stopy zgonów. Liczba zatrudnionych w gospodarce uzależniona jest natomiast od takich czynników, jak rozmiary produkcji, wydajność pracy lub płace realne (Kwiatkowski, 2002:28).

W Polsce w praktyce stosowane są dwie metody pomiaru bezrobocia:

- metoda wykorzystywana w statystyce urzędów pracy;
- metoda wykorzystywana w badaniach aktywności ekonomicznej ludności – BAEL[3].

Zgodnie z metodą stosowaną przez urzędy pracy, do bezrobotnych zarejestrowanych w Polsce zalicza się osoby, które spełniają równocześnie następujące warunki (Mały rocznik statystyczny Polski, 2000:140):

- pozostają bez pracy;
- nie uczą się w szkole w systemie dziennym;
- są zdolne i gotowe do podjęcia zatrudnienia w pełnym wymiarze czasu pracy (za wyjątkiem osób niepełnosprawnych);
- są zarejestrowane w lokalnych urzędach pracy;
- ukończyły 18 lat (z wyjątkiem młodocianych absolwentów);
- nie ukończyły 60 lat (kobiety) lub 65 lat (mężczyźni);
- nie nabyły prawa do emerytury lub renty z tytułu niezdolności do pracy;
- nie są właścicielami lub posiadaczami nieruchomości rolnej o powierzchni użytków rolnych powyżej 2 ha przeliczeniowych;
- nie podjęły pozarolniczej działalności gospodarczej ani nie podlegają – na podstawie odrębnych przepisów – obowiązkowi ubezpieczenia społecznego lub zaopatrzenia emerytalnego;
- będąc osobami niepełnosprawnymi, mogą podjąć pracę co najmniej w połowie wymiaru czasu pracy;
- nie są tymczasowo aresztowane ani nie odbywają kary pozbawienia wolności;
- nie otrzymują świadczenia lub zasiłku przedemerytalnego;
- nie odbywają szkolenia ani stażu u pracodawcy[4].

[2] Współczynnik aktywności zawodowej jest definiowany jako stosunek między zasobem siły roboczej a ludnością w wieku produkcyjnym.

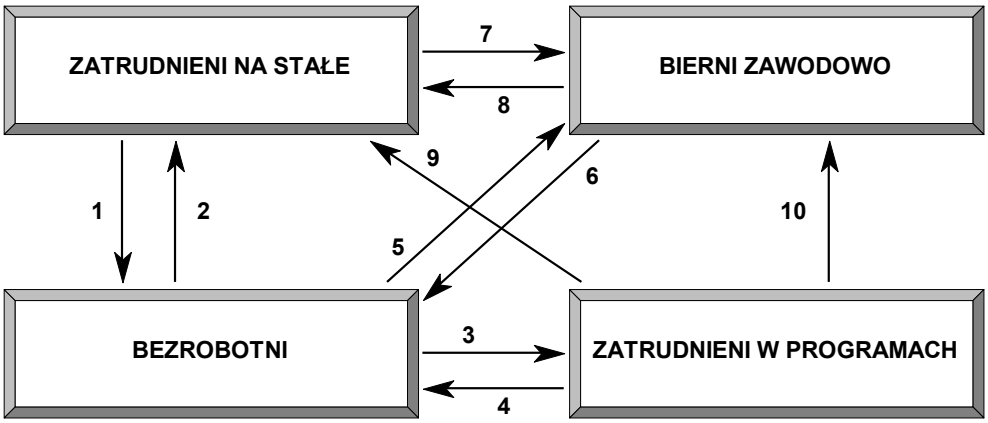
[3] Są to badania ankietowe reprezentacyjnej próby ludności danego kraju. Metoda ta jest stosowana w Polsce od 1992 roku.

[4] Pełna definicja terminu bezrobotny jest zamieszczona w art. 2, ust. 1, pkt 2 ustawy z dnia 14 grudnia 1994 r. o zatrudnieniu i przeciwdziałaniu bezrobociu, (Dz.U. 2001, Nr 6, poz. 56, z późn. zm.)

Natomiast według metody stosowanej w badaniach aktywności ekonomicznej ludności, do bezrobotnych zalicza się osoby spełniające jednocześnie następujące trzy warunki (Kwartalna informacja o rynku pracy, 2015:1):

- w okresie badanego tygodnia nie pracowały (nawet przez okres jednej godziny);
- aktywnie poszukują pracy;
- są gotowe podjąć pracę w badanym lub następnym tygodniu.

Należy zauważyć, że ze względu na nieco odmienne definicje bezrobocia przyjęte w obu metodach dane o bezrobociu pochodzące z obu źródeł nieco się różnią. Z uwagi na to, że niezmienny stan bezrobocia wcale nie oznacza stabilizacji wewnątrz samego zasobu stosowane są także analizy strumieniowe bezrobocia, które koncentrują się na przepływach osób między poszczególnymi zasobami występującymi na rynku pracy. Podejście to zostało zilustrowane na rysunku 1.



Rys.1. Strumieniowe podejście do analizy bezrobocia z uwzględnieniem aktywnych programów rynku pracy (Kwiatkowski, 2002: 31)

Strumień 1 obejmuje osoby zwolnione z pracy w trybie zwolnień grupowych i zwolnień indywidualnych oraz osoby odchodzące z pracy dobrowolnie. Strumień napływu osób do bezrobocia z zasobu biernych zawodowo (strumień 6) obejmuje osoby wchodzące na rynek pracy po raz pierwszy, którym nie udało się znaleźć miejsc pracy (głównie bezrobotni absolwenci szkół), oraz tych, którzy po pewnym okresie pozostawania poza zasobem siły roboczej podjęli ponowne starania o miejsca pracy (na razie bezskuteczne). Strumienie osób odpływających z zasobu bezrobocia obejmują bezrobotnych, którzy znaleźli pracę (strumień 2), bezrobotnych odchodzących z zasobu siły roboczej (strumień 5), bezrobotnych zatrudnionych przejściowo w aktywnych programach rynku pracy inicjowanych i organizowanych przez urzędy pracy (strumień 3). Po zakończeniu aktywnych programów uczestnicy mogą „odpłynąć" do zasobu zatrudnionych na stałe (strumień 9), zasobu bezrobotnych (strumień 4), bądź zasobu biernych zawodowo (strumień 10)[5].

[5] Znaczny udział strumienia 9 w łącznych odpływach z zasobu zatrudnienia przejściowego (strumienie 4+9+10) oznacza relatywnie wysoką efektywność aktywnych programów rynku pracy w ograniczaniu bezrobocia.

Społeczno-ekonomiczne aspekty bezrobocia

Podstawowym makroekonomicznym skutkiem bezrobocia jest utrata produkcji wynikająca z niepełnego wykorzystania zasobu siły roboczej. Istnienie części niewykorzystanego gospodarczo zasobu pracy oznacza, że faktyczny poziom produkcji w gospodarce jest niższy od poziomu potencjalnego. W perspektywie długofalowej z kolei oznacza to zmniejszoną dynamikę wzrostu produkcji. Wpływ bezrobocia na straty w produkcji dokonuje się nie tylko bezpośrednio, poprzez istnienie niewykorzystanego potencjału siły roboczej, ale również pośrednio poprzez obniżanie przeciętnej wydajności pracy. Bezrobocie jest bowiem okresem dezaktywacji zawodowej siły roboczej, w czasie którego następują procesy ubytku kapitału ludzkiego, mającego zasadnicze znaczenie dla wydajności pracy w okresie ponownego zatrudnienia. Straty produkcyjne w gospodarce związane z istnieniem bezrobocia można mierzyć na podstawie odchylenia rzeczywistego produktu krajowego brutto od jego poziomu potencjalnego. W literaturze przedmiotu istnieje nawet zależność, znana pod nazwą prawa Okuna, która wzrostowi bezrobocia o jeden punkt procentowy przypisuje spadek PKB w ujęciu rzeczowym o około trzy punkty procentowe (Okun, 1991: 293). W późniejszym okresie zależność ta została nieco zmodyfikowana i obecnie przyjmuje się, że każdy punkt procentowy nadwyżki stopy bezrobocia ponad naturalną stopę bezrobocia pociąga za sobą lukę faktycznego PKB w stosunku do potencjalnego wynoszącą 3% (Hall, Taylor, 2000:147). Rozpatrując koszty bezrobocia na płaszczyźnie makroekonomicznej, należy wspomnieć o obciążeniach finansowych ponoszonych z tytułu istnienia bezrobocia przez państwo. Obciążenia te można podzielić na koszty bezpośrednie, dotyczące wydatków na bezrobotnych i ich obsługę, oraz koszty pośrednie, związane z utratą przychodów budżetowych z tytułu istnienia bezrobocia. Do kosztów bezpośrednich obciążających finanse państwa zalicza się (Kwiatkowski, 2002: 82, 83):

- zwiększone wydatki na łagodzenie następstw bezrobocia jak również na programy jego ograniczania[6];
- wydatki na funkcjonowanie instytucji obsługujących bezrobotnych, w szczególności urzędów pracy;
- zwiększone wydatki na funkcjonowanie instytucji pomocy społecznej, policji, służby zdrowia i szkolnictwa.

Do kosztów pośrednich obciążających finanse państwa zalicza się natomiast:

- zmniejszenie przychodów budżetowych[7];
- zmniejszenie przychodów różnych funduszy celowych[8].

Choć najczęściej bezrobocie jest rozpatrywane w perspektywie ekonomicznej, to jego ważne skutki społeczne wydają się również nie bez znaczenia. Mają one związek ze stanem

[6] Chodzi o wydatki na zasiłki dla bezrobotnych i aktywne programy rynku pracy. Przy szerszej interpretacji można tutaj włączyć również zwiększone wydatki na odprawy pieniężne dla osób zwalnianych z pracy, zasiłki pomocy społecznej, wcześniejsze emerytury oraz zasiłki i świadczenia przedemerytalne.

[7] Przede wszystkim chodzi o zmniejszenie wpływów z podatków bezpośrednich (także w wyniku zatrudniania bezrobotnych w szarej strefie), ale również z podatków pośrednich, ponieważ bezrobotni kupują mniej towarów.

[8] Zwłaszcza funduszu ubezpieczeń społecznych oraz funduszu pracy.

psychicznym i zdrowiem osób bezrobotnych, funkcjonowaniem ich rodziny, kontaktami z otoczeniem, czy wreszcie rozwojem patologii społecznych. Prowadzone od wielu lat badania nad reakcjami osób na utratę pracy wskazują na występowanie w tej dziedzinie pewnych prawidłowości. Początkowo bezrobotni przeżywają fazę wstrząsu po utracie pracy, która wiąże się z uczuciem pokrzywdzenia, upokorzenia i lęku przed przyszłością. Następnie wchodzą w fazę optymizmu i nadziei spodziewając się, że stan bezrobocia jest przejściowy, traktują ten okres jako czas wypoczynku oraz realizacji własnych zainteresowań. Jednocześnie podejmują próby znalezienia nowej pracy, mocno wierząc w ich powodzenie. Bezskuteczność starań o pracę prowadzi jednak do fazy pesymizmu i rezygnacji. Pojawiają się kłopoty finansowe, pogarsza się zwykle stan zdrowia oraz rozwijają się negatywne reakcje emocjonalne. Przedłużający się okres pozostawania bez pracy wywołuje fazę fatalizmu i apatii. U bezrobotnych obniża się poczucie własnej wartości oraz motywacja do dalszego samodzielnego poszukiwania pracy czy zmiany posiadanych kwalifikacji. Następuje zasadnicze ograniczenie zainteresowań i oczekiwań życiowych bezrobotnych, co pogłębia ich izolację społeczną (Goszczyńska, 1996:7-9). Bezrobocie sprzyja także rozwojowi patologicznych zjawisk społecznych (przestępczości, narkomanii, alkoholizmu), wywiera również negatywny wpływ na stan zdrowia bezrobotnych i ich rodzin. W związku z powyższym należy ono bezsprzecznie do najbardziej dotkliwych problemów społecznych, zwłaszcza wtedy gdy staje się przyczyną niepokojów społecznych zagrażających stabilnemu rozwojowi gospodarki i społeczeństwa.

Rynek pracy i filozofia zarządzania

Obecnie na świecie istnieją trzy typy rynku pracy będące konsekwencją różnych tak zwanych filozofii zarządzania (Gładys-Jakóbik, 2000:16):

- amerykański (opiera się na takich wartościach jak: indywidualizm, rywalizacja i sukces jednostki, rokowania zbiorowe mają tutaj charakter zdecentralizowany);
- europejski (socjalna gospodarka rynkowa charakteryzująca się dużym poziomem bezrobocia i korporacyjnym modelem stosunków pracy);
- japoński (typ pośredni, prowadzący z jednej strony do mniejszych rozpiętości płac, z drugiej zaś do wysokich kosztów pracy o dużym udziale kosztów pozapłacowych, tj. podatku socjalnego).

Porównanie wymienionych powyżej trzech filozofii zarządzania ze względu na cechy systemu gospodarowania kapitałem społecznym oraz efekty ekonomiczne poszczególnych rozwiązań przedstawia tabela 1. Wynika z niej, że typem rynku pracy, który można postrzegać jako relatywnie najbardziej efektywny jest typ amerykański. W związku z tym w następnej części pracy zaproponowane zostaną pewne tendencje, które są dość powszechne za oceanem i które warto przeanalizować.

Tabela 1

Porównanie trzech typów rynku pracy

CECHY SYSTEMU GOSPODAROWANIA KAPITAŁEM SPOŁECZNYM	USA	Japonia	Europa
TYP GOSPODARKI	Liberalna (minimum państwa)	Liberalna (z elementami interwencjonizmu państwowego)	Socjalna gospodarka rynkowa (interwencjonizm rynkowy)
RODZAJ ZARZĄDZANIA ZASOBAMI PRACY	Strategiczne zarządzanie menedżerskie (menedżer dźwignią rozwoju i sukcesu firmy). Partycypacja finansowa, orientacja na jednostkę, rywalizacja i orientacja na człowieka sukcesu. Inwestowanie w rozwój człowieka: pracownik i firma.	Strategiczne (długofalowe), paternalistyczno-partycypacyjne. Partycypacja bezpośrednia (koła jakości) połączona z paternalizmem. Orientacja na grupę i integrację, orientacja na człowieka „organizacji". Inwestowanie w rozwój człowieka: firma i pracownik.	Słabsze, partycypacyjno-menedżerskie. Partycypacja przedstawicielska (rady pracownicze, rady nadzorcze) mieszana (pośrednia). Inwestowanie w rozwój kapitału ludzkiego: państwo i firma.
ZBIOROWE STOSUNKI PRACY	Zdecentralizowane	Zdecentralizowane	Scentralizowane (korporacyjne).
Układy zbiorowe pracy	Zakładowe	Zakładowe	Ponad zakładowe
Uzwiązkowienie	Niskie (14,6%)	Niskie (23,2%)	Relatywnie wysokie (40–80%)
Współpraca partnerów społecznych	Średnia	Duża	Duża
Rola rządu w kształtowaniu zbiorowych stosunków pracy	Mała (pomocnicza)	Mała	Duża
RYNEK PRACY	Elastyczność zatrudnienia i płac	Bezpieczeństwo pracy	Ochrona pracy i bezpieczeństwo socjalne
Orientacja	Pro-efektywnościowe systemy wynagrodzeń. Duża sfera ubogich pracujących. Mała sfera ubóstwa pracujących.	Sztywność zatrudnienia i płac (płace zależne od stażu i wieku). Mała sfera ubóstwa bezrobotnych. Mała sfera ubogich pracujących.	Sztywność płac (płace uzależnione od pracy i jej efektów). Mała sfera ubogich pracujących. Duża sfera ubóstwa bezrobotnych.
Płaca minimalna	Średni poziom relacji płacy minimalnej do przeciętnej (płaca minimalna ustanawiana legislacyjnie).	Relatywnie niska zdecentralizowana płaca minimalna, ustanawiana w drodze negocjacji.	Względnie wysoka płaca minimalna (sposób jej określania zróżnicowany).
STOPA BEZROBOCIA	Niska (4,6%), spada. Brak bezrobocia ukrytego.	Niska (3,2%), rośnie. Bezrobocie ukryte.	Bardzo wysoka (średnio ≈11%), rośnie.
ZDOLNOŚĆ DO TWORZENIA MIEJSC PRACY	Bardzo wysoka	Wysoka	Znikoma
SFERA UBOGICH PRACUJĄCYCH	Znaczna	Niewielka	Średnia, niewielka
PRODUKTYWNOŚĆ ---------- PKB NA 1 PRACUJĄCEGO	Wysoka ---------- Bardzo wysoki	Bardzo wysoka ---------- Japonia<Europa<USA	Europa<USA<Japonia ---------- Japonia<Europa<USA
PŁACE	Wysokie	Bardzo wysokie	Europa<USA<Japonia
KADRY	Młode, przedsiębiorcze	Zaawansowane wiekiem, elastyczne i innowacyjne	Młodsze niż w Japonii, mniej przedsiębiorcze niż w USA, mniej innowacyjne niż w USA i Japonii.
KONKURENCYJNOŚĆ GOSPODARKI	Bardzo wysoka	Wysoka	Relatywnie niska w porównaniu do USA i Japonii.

Źródło: Gładys-Jakóbik, 2000, Nr 1 (42), s. 16.

Sieci jako nowa filozofia zarządzania rynkiem pracy

Sieć to termin, który gromadzi wiele wiążących się z nią form organizacyjnych. Jedną z nich jest wewnętrznie zdecentralizowane połączenie przedsiębiorstw, a więc stan, w którym hierarchie tradycyjnie zorganizowanych firm są spłaszczane do poziomu horyzontalnych sieci niezależnych, samo-zarządzających sobą „zespołów". Scentralizowane, biurokratyczne, hierarchiczne struktury władzy, ze swoimi procesami formalnymi i wieloma warstwami zarządzania średniego szczebla, nie są po prostu wystarczająco sprawne i elastyczne, aby przystosować się szybko do zmieniających się cyklów popytu, innowacji rynkowych i technologicznych. Horyzontalne, względnie zdecentralizowane sieci są o wiele łatwiejsze do przekształcania niż ustanowione hierarchie. Praktyki produkcyjne zorganizowane w modelu sieciowym są bardziej elastyczne niż te zorganizowane hierarchicznie. Również w gospodarce opartej na wiedzy (ang. knowledge based economy) nie jest łatwo przewidzieć, gdzie jedna część organizacji będzie musiała być zdolna do funkcjonalnej współpracy z inną częścią, efektywnie i w określonym czasie, tak aby sprostać celom określonego projektu lub strategii. Oddzielenie od siebie różnych funkcji w ramach „tradycyjnych" hierarchicznych modeli struktur organizacyjnych przedsiębiorstw jest nieefektywne i powolne, a co najważniejsze nie jest też wystarczająco sprawne, aby sprostać realizacji określonych zadań, których wykonanie jest uzależnione od dynamicznie zmieniających się warunków. Zdecentralizowane połączenie wewnątrz firm pomiędzy zespołami zorientowanymi na realizację procesów, staje się regułą przedsiębiorstwa sieci. Jak wszystkie inne części przedsiębiorstwa sieci, również praca skonfigurowana jest jako przystosowana, zróżnicowana, sprawna, łatwa w ponownym rozmieszczeniu i zdecentralizowana pod względem operacyjnym, pozostając jednocześnie pod scentralizowaną kontrolą. Praca w gospodarce sieci została radykalnie zdeinstytucjonalizowana i zindywidualizowana. Coraz częściej mamy w niej do czynienia z tzw. niestandardowymi formami zatrudnienia w przeciwieństwie do formy standardowej, zdefiniowanej jako praca w pełnym wymiarze godzin, kończona o regularnej porze według względnie dopasowanego rozkładu, wykonywana w miejscu zatrudnienia utrzymywanym przez pracodawcę, zazwyczaj związana z linearną ścieżką kariery zawodowej. Okazuje się, że tego rodzaju standard nie opisuje już warunków, w jakich pracuje w gospodarce sieci coraz więcej ludzi. Miejsce standardowej formy zatrudnienia zajmują coraz częściej formy niestandardowe, które stają się nowym standardem. Na czele takich umów stoją praca w niepełnym wymiarze godzin (ang. part-time work) i praca czasowa (ang. temporary work). Drugą formą niestandardowego zatrudnienia w rozwijającej się gospodarce sieci jest samozatrudnienie (ang. self-employment) i praca kontraktowa na zastępstwo (ang. episodic contract work), konsulting oraz praca jako „wolny strzelec" (ang. freelancing), gdzie pracownicy przechodzą z jednego krótkoterminowego kontraktu do kolejnego, bez umów długookresowych z pojedynczym pracodawcą (Vosko, 2000). Trzeci zestaw zjawisk towarzyszący przekształcaniu pracy w formy niestandardowe wiąże się z tym, co mogłoby być opisane jako czasowa i przestrzenna dyslokacja pracy (Barney, 2008:116-117). Czasowa dyslokacja (ang. temporal dislocation) odnosi się do warunków zatrudnienia, w ramach których płatna praca nie jest ograniczona do kryteriów ośmiogodzinnego dnia pracy od ósmej do szesnastej, w ramach czterdziestogodzinnego tygodnia pracy od poniedziałku do piątku. Czas pracy w ramach niestandardowych umów typowych dla gospodarki sieci jest coraz bardziej czasem elastycznym, w którym praca nie jest zorganizowana względem dopasowanego, standardowego programu, ale jest raczej ciągle przystosowywana do przypływów i odpływów zapotrzebowania. Tutaj czas pracy staje się elastyczny – dwanaście

godzin dzisiaj i trzy godziny jutro, raczej trzy dwugodzinne zmiany przeplatane opieką nad dzieckiem i obowiązkami domowymi niż zmiany sześciogodzinne. To wszystko aby sprostać wymaganiom presji czasu, charakterystycznej dla globalnych i wewnętrznych rynków. Dyslokacja przestrzenna odnosi się do przemieszczania pracy w obrębie fizycznych lokalizacji innych niż mniej lub bardziej stałe, z podstawowymi udogodnieniami czy miejscami pracy zapewnianymi i utrzymywanymi przez pracodawcę. Przestrzennie przemieszczone zatrudnienie obejmuje szeroki zakres praktyk związanych z pracą, włączając w to pracę w domu, „telepracę" (praca za pośrednictwem komputera, prowadzona wyłącznie ze zdalnych lokalizacji bez obecności na głównym stanowisku pracy), czy telecommuting (praca prowadzona okresowo z domu, dzięki komputerowi, ale umiejscowiona w realnym, stałym stanowisku pracy). Możliwe, że te nowe formy zatrudnienia i pracy wychodzące z nowej filozofii zarządzania rynkiem pracy otwierają nowe możliwości pokonywania jego problemów.

Zakończenie

W ostatnich latach technologie informacyjne – w tym Internet – dokonały przemiany wielu fundamentalnych części naszego życia. Tego jak pracujemy i jak się bawimy, tego jak komunikujemy się i spożywamy posiłki, tego jako tworzymy wiedzę i uczymy się, wreszcie tego jak pracujemy, uczestniczymy w życiu publicznym i rozumiemy politykę. Wszechobecność cyfrowego „świata" wręcz otoczyła społeczeństwo tym co dziś można określić kulturą cyfrową (Trend, 2001:1). Społeczeństwo sieci staje się standardem tego, co jest normalne, wskazane, a także tego, czego możemy w sposób rozsądny oczekiwać. Społeczeństwo sieci wyznacza z kolei nowe granice dla gospodarki. Współczesne przedsiębiorstwa restrukturyzują się w pozbawione terytorium sieci, których zobowiązania w stosunku do miejsc w jakich są ulokowane oraz naturalnych i ludzkich zasobów, które wykorzystują, rozwiewają się i dążą do zaniku. Robotnicy są przemieszczani jako elastyczne węzły w tymczasowych sieciach. Generalnie rzecz biorąc nowe struktury tworzą nowe możliwości, także ekonomiczne – tworzą gospodarkę sieci i nowe możliwości pokonywania jej problemów.

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EFFICIENCY ESTIMATION OF ANTI-CRISIS DESISIONS IN THE MANAGEMENT OF UP–TO-DATE RAW ENTERPRISES

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Abstract. The article deals with modern ways of anti-crisis management at the raw enterprises taking into account different aspects of ecological problems, extensive production and exhaustion of resources, economic crises and globalization. The authors have described fundamental stages of assessment of economic efficiency of anti-crisis projects and proposed a common mechanism and mathematical model of assessment of anti-crisis solutions efficiency in the management of the iron ore company. The mechanism involves optimum reserves delineation for the best economic benefits. The authors have substantiated economic efficiency of partial extraction of unconditioned iron ore as a profitable way of anti-crisis management in modern conditions of economy development.

Keywords: efficiency, raw enterprise, anti-crisis management, optimization, economic modeling.

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Introduction

Modern business-world is extremely dynamic. Such dynamism provokes different risks, economic problems and crises at various levels of human life. Despite the fact that global progress has developed rapidly, many economic and social problems remain unresolved. This is especially true for industrial enterprises that intensively use raw materials and material resources of the planet, affecting the environment and degrading the environmental situation. However, these enterprises are of primary importance for the society and business. They use a variety of resources involved in the creation of wealth and even have considerable portion of power, which is very important. Business enterprises are closely related not only to economics, but also to the development of societies, social changes and technological advances. Thus, one of the most important challenges today is to ensure a balance between business interests, the needs of production, depletion of resources and the environment. Management of up-to - date industrial enterprise has become both science and art nowadays that allows providing such important equilibrium. This task is complicated by economic instability, risks, world crises and limitation of resources in the raw markets. Due to this fact modern business needs up-dated anti-crisis decisions.

A brief overview of research and publications

On the one hand, each industrial enterprise is a functional part of business and public environment, and on the other hand it is its driving force. So, the enterprise depends on the

external environment and at the same time influences it by production, using raw, material and human resources.

Professor Booth S. describes crisis-management of industrial enterprise as a set of elements, each of which can be a source of risk and danger (Fig. 1).

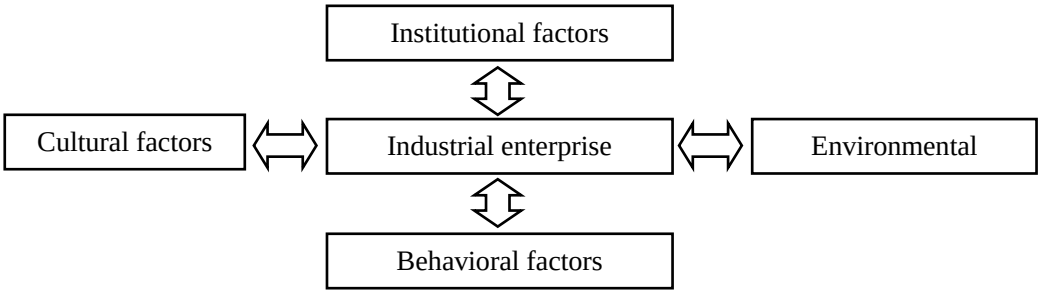

Fig.1. Environment of modern industrial enterprise
Resource: research by Booth S. (Booth, 2015: 4)

These main factors determine the strategy and management style, based on the perspective of the crisis. Thus, anti-crisis decisions need to be based on such aspects (Booth, 2015: 85):

- environmental factors that cause the most significant effects leading to the survival of the enterprise;
- institutional influences including the regulatory forms, within which the company operates, and formal relationships that affect the trajectory of the company activities;
- cultural factors that create the climate, which is the basis of risk management and the style of decision-making;
- behavioral factors that relate to individual employees and groups in the enterprise and outside it.

According to the study of Booth S. A. and others (Booth, 2015; Tietenberg, Lewis, 2016; Baxter, 2013; Lam, 2014), environmental factors are very important for enterprise management. They include the external environment and ecology, resource availability, technologies, economic and political situation in which the enterprise operates.

Summing up the aforesaid, it is worth noting that today, many scientists from different countries develop theoretical and empirical tools necessary for understanding and analyzing problems in management of environmental and resource economies (Tietenberg, Lewis, 2016; Hanley, Shogren, White, 2013; Callan, Thomas, 2013; Lowe, 2012; Heutel, 2012; O'riordan, 2014). It is important to note that these General economic concepts such as benefit-cost analysis, discounting, valuation techniques, externalities, property rights, and market failures can be applied to a number of environmental and natural resource Economics issues such as air pollution, the management of non-renewable resources, sustainable development and management of industrial enterprises.

Callan S., Thomas J. and Hanley N. (Hanley, Shogren, White, 2013; Callan, Thomas, 2013) propose their own methodology and analytical tools for the assessment of anti-crisis decision-making and planning with regard to the environmental component. So, modern anti-crisis management assumes:

- environmental risk analysis;

- assessing benefits for environmental decision making;
- assessing costs for environmental decision making;
- benefit-cost analysis for environmental decision making (Hanley, Shogren, White, 2013:126).

According to scientific works (Tietenberg, Lewis, 2016; Nusinov, Burkova, 2015; Khorolskyi, Khorolskyi, Gayday, 2015; Yellishetty, Mudd, 2014), nowadays great attention should be paid to management of such industrial raw enterprises as mining companies, because they extract ore raw materials which are very important for steel production, mechanical engineering, construction and other spheres.

Professors L. Lewis and T. Tietenberg (Tietenberg, Lewis, 2016:46,122) define such tasks of anti-crisis management and efficiency assessment of mining projects:

- finding criteria of efficiency;
- finding optimal outcome for the enterprise;
- risk estimation;
- cost-effectiveness analysis for the N-period of time;
- increasing marginal extraction cost.

Also they specify that such "decision-making metrics" is important for mining enterprises because today they are in need of effective anti-crisis solutions. Thus creation of methodology for assessing the effectiveness of various anti-crisis projects is a challenge for mining companies.

Task and its relevance

As shown earlier, today the key line of many studies concerns the development of anti-crisis decisions for the industrial raw enterprises and assessment of their efficiency. Mining companies are striking examples of such raw enterprises.

At the modern stage of industrial and economic development the economic efficiency of underground extraction requires the solution of actual issues related to their resource base expansion, production performance optimization, reducing the pace of deepening mining operations while maintaining the quality and competitiveness of iron ore products. This is particularly important for mining companies of Ukraine whose activity provides a significant contribution to the economic development of the entire industry. At present, the economic efficiency of underground mining is significantly reduced due to achievement of significant production depth (more than 1400 m), dynamic growth in energy and materials prices, an increase of dumping costs and complexity of the conditions of ore extraction.

Under these conditions, involvement in the development of the reserves, which have so far been classified as off-balance and not mined, can become the production strategy of a mining enterprise. Such a significant amount of the off-balance reserves is present at any mine. However, the complexity of the study of economic feasibility and efficiency of the off-balance reserves extraction is explained by the fact that, in some of their parameters, they may differ significantly from the standards for iron ore. Today, off-balance reserves of enterprises are being lost by enterprises almost in full due to the lack of the overall economic mechanism for the substantiation of their extraction expediency. Based on the above, the formation the mechanism of the economic justification of the off-balance reserves development expediency is an urgent task. Its solution is important for the growth of economic efficiency of mining, expansion of the resource base and the development of the mining enterprises of Ukraine in crisis conditions.

Highlights of the research

As a result of our study, we have arrived at the conclusion that in modern conditions of industrial and economic development, attracting part of the off-balance reserves of iron ores to the operation cycle is a means of enhancing the economic efficiency of underground mining. It contributes to the solution of such important management issues as:

- the expansion of the raw material base of the mining companies;
- the growth of its revenue by attracting additional sources of raw materials;
- maintaining stable production capacity of mines;
- the extension of period of cost-effective operation of mines;
- reducing the rate of costly deepening of mining operations;
- reducing the cost of mining;
- the growth of ecological and economic efficiency by reducing the intensity of heaps formation;
- compliance with the state program of mineral resources base development in Ukraine for the period until 2030, which provides for the need of economically and technologically optimal, integrated and comprehensive use of mineral resources.

In most cases, the cost of the off-balance reserves production is lower, because they occur with the advancing of the mining front and on the upper floors which are already passed, which makes it possible to involve them in the production process through the use of already passed mining developments and constructed lifting systems.

Production strategy of mining companies on off-balance reserves attraction can be effectively realized through a combination of the following components: on the one hand - the presence and availability of the off-balance reserves for mining (their amount is usually up to 20-30% of the mine reserve), and on the other hand - introduction of the economic mechanism of feasibility study for such reserves mining.

For economic assessment of reserves at a mining company we propose to introduce the concept of "economically promising off-balance reserves" – this is part of the sub-standard ores which, on the basis of their economic value, cost of production and technologically acceptable locations are economically viable for mining in the current economic and geotechnical conditions of the enterprise. Involvement of these stocks is profitable for a company and contributes to obtaining an additional economic benefit to it.

Economic efficiency of the off-balance reserves development is explained, on the one hand – with the cost of production and processing, and on the other hand - with the income that mining company can receive from the sale of marketable ore seized from each ton of the off-balance reserves. These rates differ for different mining units depending on the characteristics of their development, which ultimately determines the economic expediency of the off-balance reserves attraction to the production process.

The first step is creation of model of efficiency estimation of anti-crisis decisions at the management of iron ore companies. Given the above, the system of economic efficiency indicators of the off-balance reserves development it formed.

We have developed an analytical criterion - the index of economic efficiency, which allows comparing the development of the main indicators of the balance and off-balance reserves, namely, the volume of commodity ore produced by the company, conditioning the amount of income and the economic value of reserves and the cost of their mining and processing.

$$I_E = \frac{Q_{m2.}}{C_2} / \frac{Q_{m1}}{C_1} = \frac{Q_2 \cdot \left[c_2 \cdot \frac{l_2}{f_2} \cdot k_{r2} \cdot (1 - q_{l2} \cdot k_{leach}) \cdot (1 - q_{r2} \cdot k_{rich}) \cdot k_{T2} \right]}{Q_1 \cdot \left[c_1 \cdot \frac{l_1}{f_1} \cdot k_{r1} \cdot (1 - q_{l1} \cdot k_{leach}) \cdot (1 - q_{r1} \cdot k_{rich}) \cdot k_{T1} \right]} \cdot \frac{C_1}{C_2}, \quad (1)$$

where I_E is the index of economic efficiency of the off-balance reserves development, the proportion of units; Q_{m1}, Q_{m2} is the volume of marketable ore, produced from balance reserves and off-balance reserves correspondingly, t; C_1, C_2 is the cost of mining and processing balance reserves and off-balance reserves correspondingly, UAH; Q_1, Q_2 is the volume of balance reserves and off-balance reserves correspondingly, t; c_1, c_2 is the iron content in the ore from balance reserves and off-balance reserves correspondingly, %; l_1, l_2 is loss factor for the development conditions of the balance reserves and off-balance reserves, the proportion of units;. f_1, f_2 is contamination factor for the development conditions of the balance reserves and off-balance reserves, the proportion of units. k_{r1}, k_{r2} is recovery factor of marketable ore for the processing of the balance reserves and off-balance reserves at crushing-screening plant, the proportion of units;. q_{l1}, q_{l2} is the specific density of the leached ore, respectively, in off-balance reserves and balance reserves, the proportion of units;. k_{leach} is the reduction factor of commercial ore output during processing due to the presence of leached ore in the reserves, proportion of units, q_{r1}, q_{r2} is the proportion of rich martite ores and hematite-martite ores respectively in balance and off-balance reserves, the proportion of units;. k_{rich} is the reduction factor of commercial ore output in the presence of rich martite ores and hematite-martite ores, proportion of units;. k_{T1}, k_{T2} is the coefficient of technological losses during the processing of the balance reserves and off-balance reserves at crushing-screening plant, the proportion of units.

It is shown that the most indicative for the evaluation of the economic feasibility of the off-balance reserves development are the following values of the index (2). In terms of $I_E \geq 1$ or $I_E \rightarrow 1$ the off-balance reserves can be regarded as a cost perspective. These index values indicate that the amount of commercial ore, now received as a result of the off-balance ores mining, and the cost of their production and processing is sufficient to provide the same effectiveness as in the development of balance reserves of the mine. When $I_E \geq 1$, the off-balance reserves can be involved in the development as an alternative to balance mine reserves that will not only expand the raw material base, but will also contribute to the prolongation of the effective operation of mining horizons. When $0.9 < I_E \leq 1$, off-balance reserves mining is more efficient than the mining of balance reserves in the lower producing horizons. When $I_E < 0.9$, off-balance reserves mining is not economically viable in the current economic and geotechnical conditions of the enterprise. However, off-balance reserves index in the range $0.7 < I_E \leq 0.9$ may eventually go into the category of economically promising in case of reducing the quality requirements to raw materials, technology development and cost reduction.

At the level of the mining enterprise the overall economic effect of the off-balance reserves mining is studied as an integral component, which is formed from such partial effects:

$$\Delta E = \sum_{t=1}^{T} E_{\Delta V} \cdot \alpha_t + \sum_{t=1}^{T} E_{\Delta C} \cdot \alpha_t + \sum_{t=1}^{T} E_{\Delta Cp} \cdot \alpha_t + \sum_{t=1}^{T} E_{\Delta I} \cdot \alpha_t + \sum_{t=1}^{T} E_{ecol} \cdot \alpha_t, \quad (2)$$

where ΔE is economic impact of mining off-balance reserves, UAH / t; T is the period during which the mining company involves in the operation the off-balance reserves, years; αt is the coefficient for raising multi-temporal costs and benefits to the calculated year t, the proportion of units;. $E_{\Delta V}$ is the effect (loss) from changes in the economic value of the remote reserves in attracting off-balance ore to the production, UAH / t; $E_{\Delta C}$ is the effect (loss) obtained by reducing or increasing the cost during the reserves mining, UAH / t. $E_{\Delta Cp}$ is the effect (loss) obtained by reducing or increasing the cost of ore processing at the processing plant, UAH / t; $E_{\Delta I}$ is the effect (loss) obtained by changing the efficiency of investment, UAH / t; E_{ecol} is the effect obtained by saving the cost of the environmental tax payment, UAH / t.

Studies of peculiar features of economic outcomes and costs formation when developing off-balance reserves led to the conclusion that the overall effect of such engagement will have ecological-economic component (E_{ecol}). The E_{ecol} effect will be obtained if instead of storing off-balance reserves on the surface, the company will involve part of them to the production process and thus eliminate the need for environmental tax payment for dumps formation and maintenance. Otherwise economic efficiency of this ore development in the future is reduced due to the fact that in the dumps, under the influence of natural factors, iron ore irreparably loses much of its economic value.

Determination of the integral economic effect by the formula (2) allows you to explore its structure and determine whether the correlation between the obtained economic results and costs is sufficient to ensure the economic feasibility of the off-balance reserves mining.

Implementation of economic mechanism of feasibility study for the efficiency and expediency of the off-balance reserves development is shown by the example of JSC "EVRAZ Suha Balka" (mine “Yuvileyna”, mine named after Frunze). The study showed that part of the off-balance reserves is economically viable for mining at the enterprise. The index of economic efficiency of such off-balance reserves is usually in the range (I_E = 0.9..1), and in some cases even I_E > 1.

We have determined gradation of changes in the profit that can be obtained by mining company through the development of the off-balance reserves, as well as the optimal values of indicators such as iron content in ore and production costs, ensuring cost-effectiveness of the off-balance reserves mining (Fig. 2).

According to the calculations we have studied the dynamics of fluctuations in profit (P, UAH / ton), depending on the performance of iron content in the ore (Fe,%) and production costs (C, UAH / ton), which made it possible to define the following graduation in its changes:

I, II are the off-balance reserves which are economically feasible to involve in the mining process, as the profit from their development exceeds the average profit indicator for the balance reserves of the mine. These reserves can be involved not only as an additional production volume, but also as an alternative to part of balance reserves, which will ultimately extend the term of the mine effective functioning.

III - off-balance reserves, profits from which are lower, but for the company their development is economically more efficient than mining of balance reserves in the lower mining horizons. Consequently, the reserves of this zone are also economically promising, and they should be involved in the development with a view to the overall increase in production volumes.

IV, V - off-balance reserves, profits from which are significantly lower than in case of balance reserves mining. These reserves are not economically feasible to develop at present.

However, with technological development and changing market conditions, the reserves of group IV can go to the III, and their economic value will be revised.

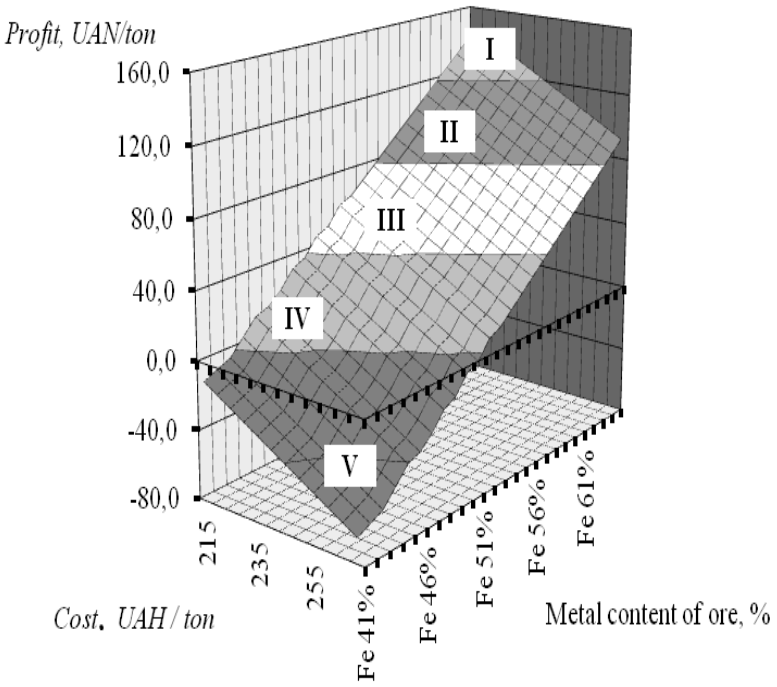

Fig.2. 3D model of profit
Resource: own research and calculations

Conclusions and suggestions

The study led to the conclusion that the anti-crisis and cost-effective production strategy for the company is involving off-balance reserves of higher and current mining horizons in the mining process with the purpose of obtaining additional economic benefits and reduction in the rate of mining operations deepening. This production strategy can also be proposed in order to increase overall performance, achieve the original design capacity of the mines, reduce the production cost and achieve the growth of economic efficiency of underground mining. At the level of the mining enterprise, the strategy can be considered in two dimensions:

1. Obtaining significant additional economic benefits by increasing production volumes subject to the availability of free reserves of production capacity of mines.

2. Off-balance reserves involvement at a constant performance of the mine in order to reduce the rate of mining operations deepening. In this case, the company will receive economic benefit comparing to mining in the underlying horizons. The time for the development of the mining horizon increases. We have found out that the expansion of the resource base by 20% due to the off-balance reserves extraction will provide ore mining

company with an extra year of cost-effective operation of the mine for every 5 years of development of the reserves.

By the example of Kryvyi Rih Basin, we have shown that withdrawal of the off-balance reserves from some mining blocks, totalling 400 thousand tonnes (up to 20% of annual mine production), will enable the company to obtain additional economic benefit of 19.8 million UAH (15% of the mine profits) with a corresponding increase in productivity and production volumes. At the sustainable annual productivity, economic benefits, compared to mining reserves in the lower horizons, will amount to 8.56 million UAH, and the intensity of the lowering of mining operations will decrease by 1.2 times. Thus, the production cost of mining off-balance reserves is by 17.5% lower than in the process of balance ore extraction at the underlying mining horizons.

Under these conditions, the involvement of the off-balance reserves in production cycle is economically and ecologically viable for the mining enterprise.

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DILEMMAS OF WORLD ECONOMY AND ECONOMICS PROBLEMS AND RISKS

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Abstract. The author, discussing the main problems of economics and the world economy, starts with the problem and the state caused by the economic crisis of 2007 – 2010, points out the importance and the threat of massive overhang of speculative money, having only the intermediate and illusory relationship with the real sphere.

As the second issue, the author recognizes the deep stratification of wealth in today's world's societies, citing the research conducted by T. Piketty in his work "Capital in the twenty-first century". As a third problem, the author shows the mistakes and shortcomings of today's globalization process of the world economy and the need to return towards the realization of the economic principles of sustainable and sovereign development of all economies of the world. At the end the author quotes and presents twelve challenges to economics, world economy and politics of the next few years, the solution of which may be the beginning of the next wave of world civilization.

Keywords: world economy, globalization, world financial crisis, real economy, speculation, dissection of property, the principle of sustainable economic development.

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Streszczenie

Zagłębiając się w dylematy światowej ekonomii i gospodarki nie podobna pominąć tego, co przynosi obecny, pokryzysowy stan, wywołany finansowym zawirowaniem lat 2007 – 2012. Jako punkt odniesienia i jako poziom biegu myśli w przyszłość.

Patrząc realnie na naszą historyczną rzeczywistość, zgodzić się trzeba z tezą, że każdy z kryzysów jakie na przestrzeni dziejów dotykały ekonomię i gospodarkę świata, powodowany wielopłaszczyznowym spektrum czynników, był ich wypadkową. Obiektywnie i subiektywnie, egzo i endogennie, ekonomicznie i poza ekonomicznie, strukturalnie i koniunkturalnie.

Po doświadczeniach wiemy także, że dość łatwo potrafiliśmy te czynniki wymieniać, nazwać. Znacznie trudniej przychodziło i przychodzi te czynniki zhierarchizować i skwantyfikować nadając im wagę siły wpływu na zaistniałe kryzysy.

Dzisiaj, po wielorakich analizach, wiemy, że trwający od 2007 roku kryzys, jest głównie dzieckiem globalnego systemu finansowego. A także globalizacji, jako procesu o światowym zasięgu.

Zgodnie z opinią Roberta Skidelskiego (Kołodki, 2010) na kryzys ten składają się trzy klęski.

Pierwsza to klęska instytucjonalna

Puszczona samopas, bez kontroli i nadzoru „inżynieria finansowa" zainfekowała rynek, a rynek kredytów w szczególności, zamieniając banki w kasyna a przedsiębiorczość i realną sferę produkcji dóbr na spekulację wirtualnym produktem inżynierii finansowej.

Ślepa wiara w skuteczność regulacyjną rynku finansowego spowodowała upadek myślenia ekonomicznego. To właśnie dlatego ekonomiści nie dostrzegali zbliżającego się kryzysu.

To druga klęska.

Trzecią była moralna klęska systemu opartego na długu i spekulacji.

Warto tu przytoczyć myśl Meynarda Keynes'a. Który pisząc o „giełdziarskiej mentalności" mieszkańców Nowego Świata ostrzegał: „Pojawia się istotne niebezpieczeństwo, że spekulacja weźmie górę nad przedsiębiorczością. Spekulanci mogą być nieszkodliwi, gdy są niczym piana na równym, czystym, wartkim strumieniu przedsiębiorczości, ale sytuacja staje się poważna, gdy akumulacja jakiegoś kraju, staje się ubocznym produktem gry hazardowej" Innymi słowy, gdy w potoku zaczyna płynąć tylko piana (Kowalik, 2009).

Tymczasem Wg *Report of the President* (Washington, 2008 r.) oraz wg badań Francois MORINA z 2002 r. - przy wielkości światowego PKB, mierzonego transakcjami sprzedaży towarów i usług w wysokości 32,3 biliona dolarów oraz wielkości transakcji walutowych, obsługujących międzynarodowy rynek handlu towarami i usługami w wysokości 8 bilionów dolarów - transakcje handlu samymi walutami w świecie miały wartość 384,4 biliona dolarów, natomiast transakcje handlu derywatami (instrumentami pochodnymi) - 699 bilionów dolarów. W 2007 r. rynek „derywatów" przekroczył 36-krotnie wartość amerykańskiego PKB, osiągając 500.000 mld dolarów . Warto dla uzmysłowienia wielkości tych kwot wyobrazić sobie, że roczne obroty rynku derywatów to równowartość 1000-letniego polskiego PKB (Błasiak, 2010).

Czy rynek spekulacji oparty jest na „prawdziwych" pieniądzach?

Otóż nie! Dzięki innowacjom finansowym, polegającym na wielokrotnym lewarowaniu, suma prawdziwych pieniędzy w kontraktach gospodarki realnej w stosunku do kontraktów inżynierii finansowej (derywatów) stanowi niespełna 2-3 % Reszta to pieniądz spekulacyjny, wirtualny, nie mający za sobą niczego poza wartością papieru, na którym jest wydrukowany.

Rozwój rynku finansowego spowodował zmianę funkcji tego rynku. Obsługa sfery realnej zostaje zepchnięta na dalszy plan, a celem podstawowym stają się transakcje na globalnym rynku kapitałowym, który wytworzył własny rynek derywatów, powiązany ze sferą realną jedynie nastrojami i prognozami.

Poza tym, rynek finansowy wraz z jego coraz to nowszymi instrumentami, nie podlegał żadnej kontroli instytucji kontrolujących banki tradycyjne. Powiązanie tych transakcji instrumentami pochodnymi z instrumentem bazowym było (i jest nadal) iluzoryczne i cząstkowe.

Przykładowo, rzeczywiste obroty ziarnem kawy na hurtowym rynku kawy w 2007 r. wyniosły 8 mld dolarów, a wartość zawartych kontraktów na cenę tego produktu (derywat, instrument pochodny) kształtowała się na poziomie 28.2 mld dolarów w tym samym okresie (Graj, 2008).

Globalna spekulacja finansowa była zatem i jest nadal niczym innym, jak tworzeniem „gigantycznej masy" spekulacyjnego pieniądza, bez żadnego jego pokrycia w gospodarce realnej.

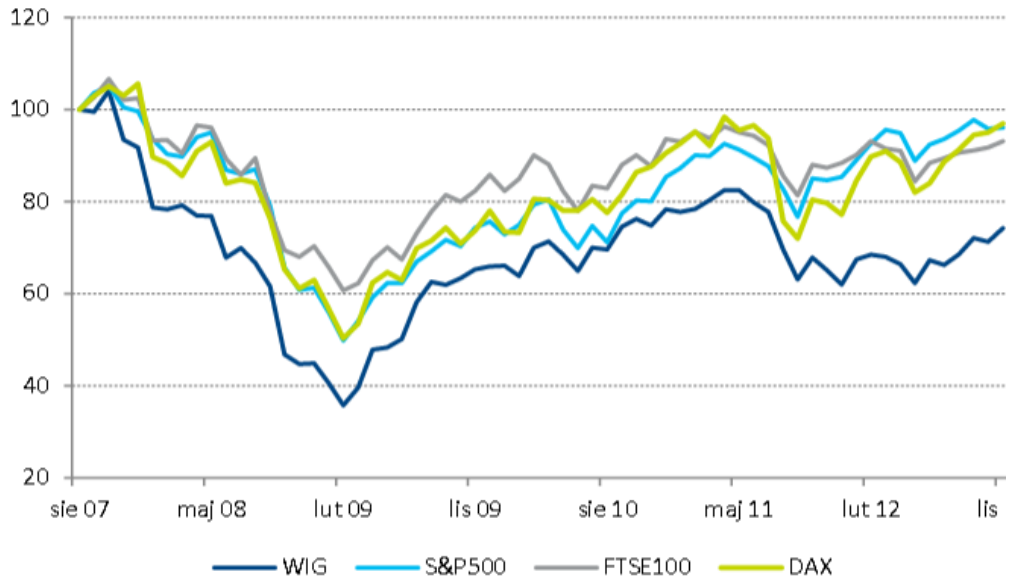
To stanowi najpilniejszy problem dzisiejszego świata. Znacznie większy od zaistniałego obecnie kryzysu finansowego. Gospodarka światowa nie posiada rozwiązań dla tego problemu.

Nie ma prostego (poza szokowym) sposobu likwidacji tego spekulacyjnego nawisu, a wszystkie proponowane rozwiązania dotyczące ograniczenia i kontroli handlu derywatami mogą przynieść efekty jedynie w dalszym niepowiększaniu owej lawiny pieniądza spekulacyjnego.

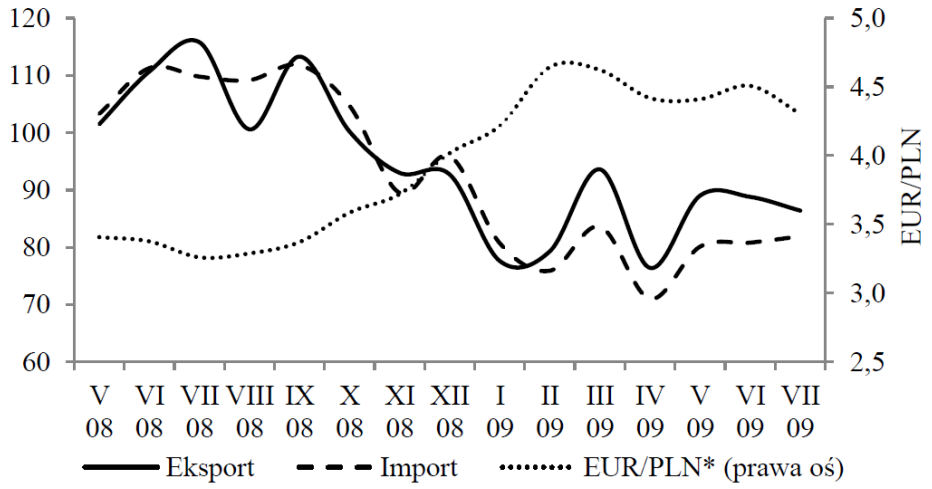
Jest oczywistym, że sfera finansowa, usługi finansowe, są tylko pośrednictwem, prowadzącym do produkcji lub konsumpcji. Mają więc sens i znaczenie tylko w powiązaniu z gospodarką realną, same w sobie nie mając realnych cech użyteczności.

Świadomość tego powinna leżeć u podstaw dzisiejszych rozważań o tendencjach rozwojowych i ekonomiki i gospodarki na świecie.

Tak więc przywrócenie koniunktury na światowych rynkach, to jedynie powrót do „starego" ładu. Nawis spekulacyjnego pieniądza pozostaje i jak sądzę, nie da nam spokoju, jeśli nie zostanie odpowiednio rozładowany i skanalizowany. Bardzo dobrze ilustrują to poniższe wykresy pokazujące zarówno skutek kryzysu w warunkach polskich jak i tzw. „siodło" kryzysu i powrót do koniunkturalnych stanów poprzednich.

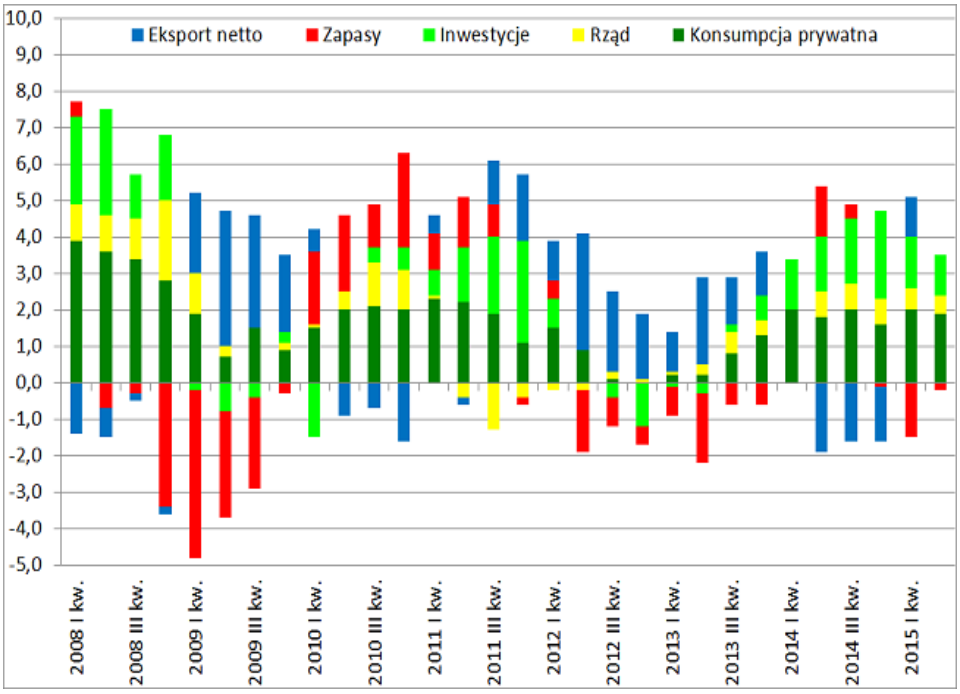


Ryc. 1. Wybrane indeksy giełdowe na przestrzeni lat 2007-2012
(Janiuk, Piotrowski, Wojciechowski, 2013)



Ryc. 2. Dynamika eksportu i importu Polski w okresie V.2008-VII.2009
(Kisiel, Wojnarska (red.), 2013: 81)

Zmiany w wartości PKB w Polsce w okresie załamania gospodarczego dokładnie zostały zilustrowane na poniższym rysunku numer 10.

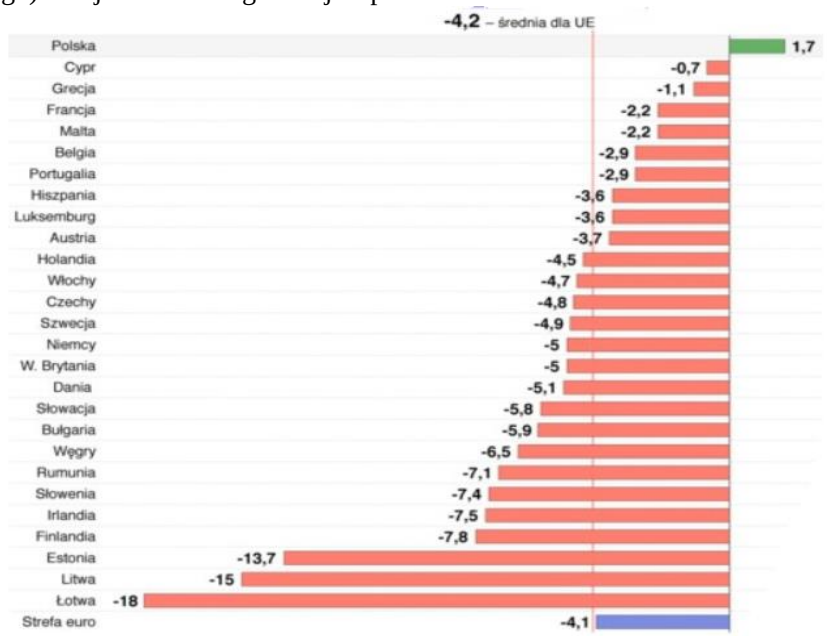


Rys. 3. Struktura polskiego PKB na przestrzeni lat 2008 – 2015
(Raport NBP Polska wobec światowego kryzysu gospodarczego Portal internetowy, 2009).

Na rysunku tym można prześledzić zmiany PKB od roku 2008 do roku 2015. Dotyczą więc samego wybuchu kryzysu, jego rozwoju i rozprzestrzeniania się na świat, a także jego schyłku. Zaznaczony został też wpływ konkretnych wartości na wielkość PKB takich jak:

1. eksport
2. zapasy
3. inwestycje
4. rząd
5. konsumpcja prywatna (Grzelak, 2010).

Podobnie, nie da nam spokoju świadomość tego, że usunęliśmy skutki, nie czyniąc wiele, by trwale usunąć przyczyny jakie wywołały kryzys. Pewne tu nadzieje dają postanowienia szczytów waszyngtońskiego i londyńskiego grupy G20 mimo, że nie bez kwestii spornych (Problem wzrostu, jako priorytet, podnoszony przez USA i pogląd Francji i Niemiec, kładących nacisk na silne międzynarodowe regulacje dla całego sektora finansowego) Ani jedno ani drugie nie jest pewne.



Rys. 4. PKB państw UE w 2009r. (Eurostat; Węglewski, 2010)

Pewne jest jedno - Konsekwentne przeprowadzenie zasadniczej reformy finansów międzynarodowych daje szansę skutecznego zapobiegania kryzysom w przyszłości, natomiast próba kontynuowania *status quo* będzie oznaczać recydywę zaburzeń, tych, które znamy i tych nowych, które dopiero w wyniku recydywy poznamy.

Czy znajdzie się zatem powszechna wola by skutecznie dla całego świata te problemy rozwiązać ? Nie sądzę !

Powszechnie konstatuje się, że..... „jedynym dzisiaj pewnym jest to, że nic nie jest pewnym". Bardziej zatem prawdopodobną będzie konieczność „korekt w biegu" z uwzględnieniem refleksji nad tym, jakie są źródła zjawisk, które naruszają naszą pewność i dotychczasowe stereotypy.

Następnym poważnym dylematem naszych rozważań o przyszłości będzie kwestia rozwoju i jego tempa.

Bez instytucjonalny i chaotyczny na dziś przebieg procesu globalizacji każe zapytać: rozwoju..... jak intensywnego ? gdzie i w jakim tempie osiąganego?

Nie jest moim tu zadaniem budowanie katastroficznych wizji. Ufam, że podobnie jak i w przypadku przewidywań Malthusa w osiemnastym wieku o nieproporcjonalnej dychotomii przyrostu naturalnego człowieka i produkcji żywności, postęp techniczny i ludzka wiedza rozwiążą i nasze obecne, trudne sprawy i problemy eksploracji zasobów ziemi (nowe złoża i pokłady, powszechny recykling, nowe źródła energii, ekologia).

Konieczność jednak zwrócenia uwagi na ochronę środowiska przyrodniczego oraz wyczerpywanie się zasobów naturalnych zmuszą nas prędzej czy później do odpowiedzi na te pytania.

Proces globalizacji, nie może bowiem, pozostać rabunkowym procesem zawłaszczania zasobów z pozycji siły (obojętne, czy siły militarnej, czy siły kapitału, czy siły technologicznej) a musi przekształcić się (jeśli ma nadal rozwijać się pokojowo) w proces zrównoważonego rozwoju z powszechną tego akceptacją wszystkich państw biorących w nim udział.

Co to oznacza ? Oznacza to, że Państwa bogate, będą musiały zrezygnować z dotychczasowego tempa rozwoju, na rzecz państw zacofanych i biednych, jeśli te, mają w przyszłości stać się równoprawnymi partnerami kooperacji, produkcji, handlu, nauki i rozwoju.

Bez wątpienia, bardzo poważnym problemem w niedalekiej przyszłości będzie problem ekonomii nierówności.

Przedstawiony światu solidnymi badaniami Thomasa Piketty'ego (Piketty, 2015) (Ekonomia nierówności oraz Kapitał w XXI wieku) jest i będzie bardzo poważnym problemem ekonomicznym i społecznym.

Dla udokumentowania tej tezy przytoczę dwie opinie związane z tymi opracowaniami a mianowicie Paula Krugmana, noblisty, zamieszczoną w New York Times, oraz Rafała Wosia, publicysty Dziennika Gazety Prawnej zamieszczoną na portalu Tokfm. pl.

„Można bez ryzyka przesady powiedzieć, że Kapitał w XXI wieku, magnum opus francuskiego ekonomisty Thomasa Piketty'ego, będzie najważniejszą książką ekonomiczną roku, a może i dekady. Piketty, niewątpliwie wiodący na świecie ekonomista badający dochody i nierówności, dokonał czegoś więcej niż tylko udokumentował wzrastającą koncentrację bogactwa w rękach wąskiej elity. Pokazał też, że wracamy do czasów „kapitalizmu patrymonialnego", w którym na szczytach gospodarczej hierarchii dominuje nie tyle nawet bogactwo, ile odziedziczone bogactwo, przez co urodzenie znaczy więcej niż wysiłek i talent"

Paul Krugman.

„W Kapitale w XXI wieku Piketty do katalogu podatkowych rozwiązań dodał też jeszcze zupełnie nową koncepcję podatku majątkowego. I to najlepiej wprowadzonego od razu na poziomie globalnym (ideał) albo "przynajmniej" unijnym (to już jest możliwe). Chodzi mu o progresywny podatek od majątku netto. [...] Na pytanie, czy takie opodatkowanie jest sprawiedliwe, Piketty odpowiada zwykle pytaniem: A czy sprawiedliwa jest sytuacja, w której majątek po osiągnięciu pewnej wielkości przestaje być w ogóle przedmiotem zainteresowania fiskusa? Czy to jest fair wobec tych wszystkich szaraczków wypełniających grzecznie swoje zeznania podatkowe, przed którymi nie mogą uciec? [...] Wszystkie te podatkowe eksperymenty nie są dla Francuzów [tj. Piketty'ego i jego kolegów

ekonomistów] jakąś lewacką fanaberią. Oni są przekonani, że w ten sposób ratują kapitalizm przed nim samym, zanim rosnące nierówności doprowadzą do potężnego tąpnięcia na wzór rewolucji francuskiej z 1789 r. albo bolszewickiej. Stąd radykalna krytyka nierówności, podwyżki podatków i dowodzenie, że wolny rynek może w końcu zabić kapitalizm"

Rafał Woś.

Mówią one wszystko. Ja chcę tu tylko uzmysłowić problem najbliższej przyszłości. Zarówno terroryzm jak i obecne problemy migracyjne i uchodźcze, u swego podłoża, tak naprawdę, mają właśnie problem szeroko pojętych nierówności, zidentyfikowany i udokumentowany przez Piketty'ego w stosunku do kapitału, majętności i płac.

Teza, że rosnące i potęgujące się nierówności mogą wywołać skrajne niezadowolenia społeczne, polityczne i rewolucyjne napięcia nie jest gołosłowna. Wystarczy zagłębić się w historię ostatnich stuleci i.... ostatnie lata zawirowań społecznych i politycznych, bowiem w wielu krajach na bazie niezadowolenia, związanego z kryzysem oraz nierównościami społecznymi o podłożu ekonomicznym, rozwijają się ruchy „Prekariuszy". A „prekariackie" partie powstają w całej Europie, (weźmy chociażby hiszpański Podemos, grecką Syrizę czy ostanie wybory w Polsce i startującą w wyborach partię Razem).

Dokładna i wielopłaszczyznowa analiza przyczyn oraz rozmiarów finansowych kataklizmów Świata, nasuwają prawdopodobną tezę, że ostatni kryzys, jest znacznie głębszy i sięga konieczności korekt podstaw systemu. Będzie też trwać znacznie dłużej niż się wydaje.

Przedstawione tu rozważania i analizy nasuwają pewne analogie związane ze zjawiskiem „homeostazy". Zjawiskiem, które jest właściwe organizmom żywym, omawianym na lekcjach biologii.

Gospodarka i społeczeństwa, w których gospodarka funkcjonuje, też są - jak uczy historia - organizmem żywym i jak się wydaje, też posiadają wbudowany w swój organizm ów homeostatyczny mechanizm. Mechanizm samokontroli, samoregulacji oraz zdolności do naprawy zachodzących odchyleń od norm. Ale historia zna przypadki takiego stanu destrukcji czy entropii, gdy wzburzenie organizmu jest zbyt dogłębne, a proces destrukcji i związanej z tym entropii przekracza stan krytyczny, odcinając drogę powrotu do starego porządku i ładu. Tym stanem społecznym są ... rewolucje, czyli stany, gdy organy i siły „starego porządku" nie są już w stanie przywrócić ładu poprzedniej równowagi. Nastaje stan, w wyniku którego kształtuje się nowy ład i nowy porządek organizacyjny. Jak wiadomo z historii i praktyki, „nowy" tutaj, podobnie jak i w biologii (*cancer*) niekoniecznie oznacza dobry. Co było po rewolucjach, jakie dotknęły ludzkość? Dzisiaj już wiadomo.

Jaka przyszłość zatem dla gospodarki i jej ekonomiki ? Prof. Kołodko ujął ją w dwanaście wyzwań o fundamentalnym znaczeniu dla następnej fali cywilizacyjnej. Oto one:

1. Tempo i granice wzrostu gospodarczego
2. Ewolucja wartości i ich kulturowe implikacje dla procesów rozwojowych
3. Instytucjonalizacja globalizacji *versus* narastający brak koordynacji i chaos
4. Integracja regionalna i jej sprzężenie z procesem globalizacji
5. Pozycja i rola organizacji pozarządowych
6. Środowisko przyrodnicze i konkurencja o wyczerpujące się zasoby
7. Procesy demograficzne i migracje ludności
8. Bieda nędza i nierówności społeczne
9. Gospodarka i społeczeństwa oparte na wiedzy
10. Postęp naukowo techniczny
11. Ewolucja sieci informatycznych i jej gospodarcze konsekwencje
12. Konflikty i wojny, pokój oraz międzynarodowe bezpieczeństwo

Jak łatwo zauważyć, niektóre z nich, (podkreślone) zostały tu w skrócie (na ile pozwalała objętość materiału) szerzej nieco, w formie sygnalnej omówione.

Nie od rzeczy zatem na koniec, przypomnieć można słuszny moim zdaniem pogląd prof. Kołodki, że ekonomiści na gruncie tradycyjnej ekonomii nie potrafią już w zadowalający sposób wyjaśniać istoty procesów rozwoju gospodarczego (Kołodko, 2010).

„Najciekawiej i najbardziej płodnie, jak pisze Profesor, jest na styku dyscyplin naukowych ”

Toteż szeroka współpraca, szeroki jej front, „konsiliencja nauk” są nie tylko pilną potrzebą ale i jedyną narzędziową podstawą, dającą szansę skutecznego rozwiązywania społecznych i gospodarczych problemów naszego..... jedynego i zachwycającego w swym pięknie Świata.

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LIBERALIZATION OF CAPITAL ACCOUNTUNDER INTEGRATION

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Abstract. The article summarizes countries' approaches to the liberalization of capital accountincluding CEE countries before their accession to the European Union – in pre-accession. The main steps on the way of capital liberalization are identified: the removing of restrictions on FDI before the liberalization of financial flows; the preference for the liberalization of capital inflows against capital outflows; the primary liberalization of long-term capital flows against short-term flows. The financial liberalization experience in Kazakhstan and Uzbekistan in the context of regional integrationis considered. As it is known, Uzbekistanhas always stayed away from the projects of economic integration. As a result, this country has a less developed domestic exchange market.In contrast, an active integration policy of Kazakhstan has become the driving force behind the liberalization of exchange regulation.

Keywords: globalization, regional economic integration, financial integration, international capital flows, liberalization of capital account.

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Introduction

Formation of globalized financial environment of interaction of economic agents is one of the most important signs of our time. Globalization does not only change the balance of power on the world stage, but it also determines the new sovereign integration imperatives of economic and financial policies. So today one can see a range of serious qualitative changes in integration processes, which make them the only path for the development of nations and regions.

Regionalization of world economy – is a natural stage of modern world economy development under the globalization. A consistent enforcement of the European model of development in general is the main strategic goal of Ukraine's public policy. Thus, the study of international experience in regional integration is the topical scholarly task for politicians and government.One of the most important aspects of such studies is the capital account liberalization.

Liberalization of capital accountin CEE countries

Analyzing the experience of capital account liberalization of CEE countries under the European integration, it should be noted that it is closely related to their transition to market economies.

As a first step, current account convertibility was achieved between 1994 and 1996 as a part of IMF membership obligations. For the Czech Republic, Hungary, Poland, and the Slovak Republic, the application for OECD membership in 1993-1994 was an additional

catalyst for capital account liberalization. But most importantly, the prospect of EU membership and the accession negotiations provided an institutional anchor for capital account liberalization in all CEE countries (Hagen, Siedschlag, 2008).

The European integration is a multi-speed process. In the beginning of the period 1995-2004 international financial integration was higher in CEE countries with gradual liberalization policy. But from 1998 the speed of integration was much higher in countries that have rapidly liberalized their capital accounts. Some of them fall under the risks of sudden stops of capital flows and, as a result, formation of large economic and financial imbalances.

So governments should be ready for the adequate response to a sudden stop with the necessary financial rescue of the banking system and a fiscal expansion to partly absorb the fall in aggregate demand.

The integration of each country into the world or regional economy is a very special process reflecting different macroeconomic terms of country economic development. Nevertheless, we can identify three common features of capital flows liberalization in CEE countries before their accession to the European Union which are the main lessons for Ukraine and many other countries:

- the removing of restrictions on FDI before the liberalization of financial flows;
- the preference for the liberalization of capital inflows against capital outflows;
- the primary liberalization of long-term capital flows against short-term flows.

Liberalization of capital account in some post-socialist countries

We would like to consider in our study the financial liberalization experience in two separate countries of the former socialist bloc, namely – Kazakhstan and Uzbekistan to compare them in the context of integration policy despite the fact that the trajectory of their movement is outside European integration. We regard, the importance of such a policy makes it necessary to coverage of their content as close as possible to the relevant national standards and regulations mentioned below.

The National Bank in agreement with the Government of the Republic of Kazakhstan for a number of years, since 2002, has implemented a policy of gradual liberalization of the exchange regime. By 1 January 2007, in Kazakhstan, in accordance with the program of liberalization of the foreign exchange regime for 2003-2004 and for 2005-2007, the Central Bank implemented a number of measures: the licensing of capital movements operations and opening accounts in foreign banks, lifting restrictions on exchange operations of legal entities in the domestic foreign exchange market, a new scheme of control over execution of requirements of currency repatriation. The main purpose of foreign exchange liberalization was the complete abolition of exchange restrictions on the movement of capital and the creation of an informative statistical and analytical monitoring of the exchange operations as a basis for decision-making on economic policy.

Next, let us consider the main features of the monetary policy of Kazakhstan in accordance with the official website of the central bank (National Bank of Kazakhstan).

Currently, there is a liberal foreign exchange regime in Kazakhstan, which does not contain any restrictions on the free movement of capital and in no way impedes the implementation of business activity in this country.

The goal of exchange regulation in Kazakhstan today is to promote public policy to achieve sustainable economic growth and economic security of the country. Accordingly, the objectives of exchange regulation are:

1) establishing procedures for handling foreign exchange values in the country;

2) creation of conditions for further integration into the world economy;

3) providing the information base on foreign currency transactions and capital flows.

Obtaining a license is only required for the implementation of activities for the organization of exchange operations with foreign currencies (the activity points of currency exchange).

Modes of registration and notification allow for large-scale operations of capital movements, which involve inflow of capital (property, cash) to the Republic of Kazakhstan in the amount of over US $ 500 thousand in the equivalent or transfer of capital (cash, transfer of property) of the Republic of Kazakhstan in the amount of over 100 thousand US dollars equivalent.

According to the registration mode a resident must give to the National Bank the copy of the exchange agreement as the basis of the movement of capital before the operation. But in terms of notification mode, theresident should provide information to the National Bank on transactions (including foreign exchange contract) after operation. The requirement of registration and notification is applied only to the residents of the Republic of Kazakhstan.

In foreign exchange legislation of the Republic of Kazakhstanin order to ensure the supply of foreign currency on the domestic foreign exchange market there is a requirement of currency repatriation, which is credited to the bank accounts in the authorized (Kazakhstan commercial) banks:

1) revenues in local and foreign currency from the export of goods (works, services);

2) national and foreign currency transferred by a resident to a non-resident for payments for imports of goods (works, services), in the case of non-fulfillment or incomplete fulfillment of obligations of a non-resident.

In accordance with the current legislation, the period for the repatriation is determined solely by the terms of the foreign trade contract without any restrictions on the implementation of the transaction on the export or import of repatriation upon expiration. This requirement applies only to the residents (legal entities established under the laws of the Republic of Kazakhstan, and individual entrepreneurs - citizens of Kazakhstan).

The monitoring of repatriation requirement is carried out on foreign trade transactions, the sum of which exceeds US $ 50 thousand in the equivalent by registration of the foreign trade contract with the commercial bank serving the resident's foreign trade transaction.

However, given the existing risks of external shocks, the Law of the Republic of Kazakhstan dated 13 June 2005 "On Exchange regulation and Exchange control" provides a mechanism for rapid response in the event of threats to the economic security of the Republic of Kazakhstan and the stability of its financial system.

Namely, if the situation cannot be solved by other measures of economic policy, the Law provides for the opportunity to brief introduction of certain foreign exchange restrictions in the framework of the special exchange regime, such as:

1) the requirement to open a bank deposit without payment of remuneration in the amount determined as a percentage of the amount of foreign currency transaction in the authorized bank or in the National Bank for a fixed term;

2) the requirement to obtain a special permit from the National Bank to conduct foreign exchange operations;

3) the requirement of mandatory sale of foreign currency received by residents of the Republic of Kazakhstan;

4) establishing repayment period for foreign currency earnings; limits on volume for settlements of foreign exchange transactions.

Special exchange regime could be introduced by the President of the Republic of Kazakhstan, after consultation with the Government and the National Bank for a term not exceeding one year.

So far, the protective mechanism of the Republic of Kazakhstan has not been applied.

As a whole, an active integration policy of Kazakhstan has become the driving force behind the liberalization of exchange regulation.

Uzbekistan is on the threshold of major changes in the sphere of exchange relations: in 2017 the wide scale exchange liberalization is expected. It is aimed at the development of the domestic foreign exchange market and increasing its efficiency as well as improved conditions for foreign economic activity of business entities (Draft decree of the President of Uzbekistan, 2016). In the document the main priorities of the liberalization of monetary policy include the following:

– change of all the state bodies regulating methods of control and a restrictive approach to the protective-stimulating, meaning ensuring the implementation of the right to dispose of its own assets at its discretion and to create a favorable investment climate and business environment;

– stimulating the growth of the export potential of the country, improving the competitiveness of domestic producers on foreign and domestic markets;

– creation of equal conditions for all participants of foreign economic activity during their foreign exchange operations, the prohibition of the practice of presenting the benefits and preferences to individual companies or sectors;

– the establishment of the national currency against foreign currencies solely for the use of market mechanisms;

– preventing the establishment of legislation, adversely affecting the stability of the national currency.

We have found out in our research that in order to ensure the full realization of the rights of legal entities and individuals on the free disposal of their own resources the above-mentioned policy:

– allowed the payment of profits, dividends and other income in foreign currency, in the presence of foreign currency earnings and funds on accounts of legal entities, based on decisions of the shareholders (participants);

– allowed transferring foreign currency funds on the territory of Uzbekistan between individuals using a bank transfer, postal order or payment systems;

– made it possible that individual entrepreneurs without legal entity are permitted to pay for imports of goods and services in the established order, through their bank accounts;

– exporters and importers freely at their discretion choose the form of payment for their foreign trade contracts concluded under the laws of exchange regulation;

– export of cash foreign currency outside the country up to the amount equivalent to $ 10,000 is carried out without any restrictions, except for the cases established by government decisions. Similarly foreign currency in cash in the amount equivalent to $ 2,000 is not subject to mandatory declaration in its import and export to / from Uzbekistan;

– it abolished the practice of giving commercial banks and the Central Bank the authorization for the export of cash foreign currency outside Uzbekistan;

– non-residents of Uzbekistan (legal entities and individuals) are entitled to open accounts in the banks of Uzbekistan and freely dispose of the funds on their accounts at its discretion in the manner prescribed by law.

In order to create favorable conditions for the export of foreign economic activity of participants the followingsteps are taken:

– exporters and importers are free at their discretion to choose the form of payment for their foreign trade contracts concluded under the laws of exchange regulation;

– the revenues of exporters in foreign currency, regardless of their ownership, are not subject to sale, with the exception of exports of goods and services, the list of which is approved annually by the decision of the Cabinet of Ministers;

– unification of deadlines for obtaining proceeds in foreign currency and commodities (services) for export-import operations;

– granting the right to individual entrepreneurs without a legal entity to acquire foreign currency on the domestic foreign exchange market, in the manner prescribed for legal entities –the residents of Uzbekistan.

The phased reduction of the size of the mandatory sale of foreign currency earnings from the export of certain goods and services is planned till its future complete abolition.

It is planned to develop a simplified procedure for the purchase and sale of business entities of foreign currency in the domestic foreign exchange market, providing it:

– free purchase and sale of foreign currency for payments for current international transactions;

– realization of foreign exchange by commercial banks to customers through their own resources, including resources purchased by customers, while ensuring the safety of funds on accounts and deposits of physical and legal persons and fulfilling the requirements of foreign exchange position limits.

In order to introduce modern principles and mechanisms of regulation, reducing bureaucratic barriers in banking, eradication and prevention of administrative interference in the activities of commercial banks, as well as removal from their non-core functions, it is planned to establish that:

– conditions for the issuance and repayment of foreign currency loans by domestic commercial banks are determined on the basis of the credit policy, based on the agreement of the parties;

– commercial banks in providing banking services to customers are prohibited to restrict the rights of the free disposal of their assets in foreign currency;

– the practice of issuing licenses to commercial banks to carry out operations in foreign currency, when carrying out foreign exchange transactions on the basis of a license for banking activities is canceled.

Based on the analysis of the impact of proposed changes in the first half of 2017 it is planned to develop a new draft law "On Exchange regulation", providing:

– all aspects of exchange transactions that occur in practice, with a maximum reduction in the practice of reference rules;

– definition of the Cabinet of Ministers as a body of exchange regulation, along with the Central Bank with a clear definition of their powers;

– realization of the rights of legal entities and individuals on the free disposal of own resources;

– ensuring the stability of the national currency of the Republic of Uzbekistan;

– regulation of funds transfer outside for investment purposes, taking into account the country's economic interests.

From the foregoing it follows that the change of exchange regulation in Uzbekistan relates mainly to the liberalization of the current account of balance of payments, while Kazakhstan has implemented the liberalization of the capital account.Against the background of the progressive liberalization of monetary policy Kazakhstan has a good progress. In accordance with EBRD, economic conditions have started to stabilize since March 2016. Since March, the exchange rate was stable, appreciating by around 10 per cent in February to June 2016, with short-term liquidity gradually returning to the market. As a result, the NBK, in a series of reductions, lowered the monetary policy rate to 13 per cent in July, from 17 per cent in January 2016. The NBK has also maintained a high level of international reserves, up by 9.4 per cent in June compared with the beginning of the year as a result of interventions in the foreign exchange market; National Fund reserves also increased by 3.5 per cent between the beginning of the year and June 2016. In the banking sector, tenge deposits increased by 6.6 per cent in the first half of 2016 and dollarization slightly decreased from the peak of 70 per cent in January 2016, indicating the stabilization of currency preferences (Transition Report 2016-17, 2016).

Uzbekistan takes the 87th place in the ranking of 190 countries in terms of quality for entrepreneurial activity, driven by the World Bank report "Doing Business - 2017". Serious obstacles to businesscontinue to have a negative impact on foreign and domestic investments and the overall competitiveness of the economy. The country lags behind withstructural reforms, particularly in such areas as economic management, enterprise access to finance and monitoring the foreign currency conversion (Transition Report 2016-17, 2016).So we should regard liberalization of exchange regulation in Uzbekistan as a necessary policy for the development of the country.

Uzbekistan almost always stayed away from projects of economic integration. As a result, this country has a less developed domestic exchange market which does not promote the overall development of the economy.

Conclusions and suggestions

In a globalizing world economy and the growth of international financial transactions, capital movement liberalization is inevitable and it is a necessary condition for economic development for countries wishing to maximize the benefits of greater integration into the world economy.

Cancellation of restrictions on capital flows is accompanied by a reduction in the administrative costs of participants of foreign economic operations, providing greater freedom of entrepreneurship. At the same time, in the process of liberalization of the exchange rate regime increased requirements for effective economic policy that adequately meets the risks associated with capital mobility, when the decision-making by market players about investing in domestic or foreign assets is determined by economic factors, and the impact of administrative costs is minimal.

Achieving stability in the money market, the balance of foreign currency demand and controlled inflation has necessitated the development of new approaches to the liberalization of the foreign exchange regime, aimed at the removal of certain restrictions on the conduct of foreign exchange operations, the use of other methods of foreign exchange transactions regulation, in accordance with the requirements of time and international practice.

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STAFF AS AN ESSENTIAL ELEMENT OF MARKETING-MIX IN BUSINESS SERVICE

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Abstract. This paper presents the role played by staff especially in service companies. It is an important strategic element of any organization. Customers evaluate the quality of the product intangible based on the behavior, knowledge and skills of employees with whom they have direct contact. A properly trained and familiar with the mission and the everyday tasks staff ensures the development of the organization. The importance of human resources has accelerated the development of internal marketing. Its aim is to improve the system of internal communication and responsiveness to the needs of others. We see employees as internal customers.

Keywords: staff, business service, internal marketing.

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Wstęp

Postępujące procesy globalizacji i regionalizacji gospodarki oraz związany z nimi wzrost konkurencji zarówno na rynkach krajowych jak i zagranicznychsprawia, że przedsiębiorstwa chcąc utrzymać się na rynku, zmuszone są do poszukiwania nowychrozwiązań. Nie wystarczy wytworzyć nowy produkt lub usługę, ale konieczna staje się zmiana orientacji przedsiębiorstwa z orientacji produkcyjnej na orientację marketingową. Rozwojowi i upowszechnianiu orientacji marketingowej sprzyja konkurencja, która stanowi trwały element gospodarki rynkowej.

Dobór właściwych instrumentów marketingu w dużej mierze decyduje o pozycji przedsiębiorstwa na rynku. Firmy prowadzące działalność w sferze usług, oferujące produkty o charakterze niematerialnym mają niezwykle trudne zadanie. Istotnym elementem marketingu-mix staje się wówczas personel (ludzie). Na podstawie bowiem pierwszego kontaktu z pracownikami klient kształtuje opinię o firmie oraz jakości usługi, którą przekazuje innym. Negatywny przekaz może znacznie obniżyć efekty pozostałych instrumentów marketingowych.

W artykule przedstawiono rolę personelu stanowiącego ważny element strategiczny każdej organizacji. Odpowiednio przygotowany pracownik, który utożsamia się z firmą, gwarantuje rozwój przedsiębiorstwa. Znaczenie zasobów ludzkich przyspieszyło rozwój marketingu wewnętrznego, którego naczelną zasadą jest traktowanie pracowników jak klientówwewnętrznych.

1. Marketing

Marketing jako kategoria ekonomiczna pojawił się w latach sześćdziesiątych w krajach o rozwiniętej gospodarce rynkowej (Altkorn, Kramer, 1998: 216). Jest nieodzownym warunkiem jej funkcjonowania. Według Ph. Kotlera „marketing jest procesem społecznym i

zarządczym, dzięki któremu konkretne osoby i grupy otrzymują to, czego potrzebują i pragną osiągnąć poprzez tworzenie, oferowanie i wymianę posiadających wartość produktów" (Ph. Kotler, 1999: 6). Interesujące podejście prezentuje A. Payne, który traktuje marketing jako „proces postrzegania, rozumienia, stymulowania i zaspokajania potrzeb podmiotów na wybranych rynkach docelowych za pomocą określonych środków skierowanych na pokrycie zgłoszonego na rynku zapotrzebowania" (Payne, 1997: 39).

Zadaniem marketingu jest usatysfakcjonowanie konsumenta lub nabywcy poprzez najpełniejsze zaspokojenie jego potrzeb, życzeń i preferencji. Marketing polega na dostosowaniu się do zmiennych warunków rynkowych i aktywnym wywieraniu wpływu na rynek dla osiągnięcia własnych zamierzeń. Jego celem jest zapewnienie sukcesu przedsiębiorstwom poprzez dostarczenie konsumentom i nabywcom maksimum satysfakcji z zaspokojenia określonych potrzeb (Daszkowska, 1998: 123, 125; Grzegorczyk, 2004: 9).

Bardzo często marketing utożsamiany jest z reklamą, a tymczasem obejmuje on znacznie szerszy zakres działań. Jest procesem złożonym, w ramach którego „bada się, przewiduje i kształtuje poziom oraz strukturę popytu na dobra i usługi" (Mruk, Pilarczyk, Sojkin, Szulce, 1999: 10). Stanowi zintegrowany zespół narzędzi i działań rynkowych, dzięki zastosowaniu których firma może poznawać, kształtować i zaspokajać potrzeby nabywców, realizując zarazem własne cele ekonomiczne (Pindakiewicz, 2000: 11).

Marketing jest związany z procesami racjonalnego postępowania na rynku oraz odpowiada wyzwaniom współczesnej gospodarki rynkowej. U podstaw marketingu znajduje się kreatywny sposób myślenia firm o nabywcach oraz ich potrzebach, który z kolei jest podstawą świadomego wyboru kierunków postępowania umożliwiających celowe kojarzenie procesu zaspokajania potrzeb konsumentów z efektywnym wykorzystaniem dostępnych zasobów. Przedmiotem wyboru są metody, instrumenty i działania, które tworzą metodyczną oraz instrumentalno-czynnościową strukturę marketingu (Garbarski, Rutkowski, Wrzosek, 2006: 27).

2. Marketing-mix w usługach

Działalność marketingowa firmy koncentruje się wokół rynku. Zmiany w sytuacji rynkowej postawiły firmy usługowe wobec nowych wyzwań. Postępujące przemiany systemowe i nowe zjawiska zachodzące w otoczeniu podmiotów gospodarczych stały się przyczyną istotnych impulsów w procesach aktywności rynkowej, umożliwiając wdrożenie zasad działania marketingowego. Kształtowanie racjonalnej strategii polega na wyborze i zastosowaniu takich instrumentów, które umożliwiają intensywniejsze oddziaływanie na zjawiska rynkowe (Pukas, Styś, 2003: 250-251).

Usługę można określić jako działalność gospodarczą wytwarzającą „wartość dodaną" i zapewniającą korzyści klientom. Sektor usług obejmuje wiele branż, między innymi usługi finansowe, prawne, księgowe, hotelarstwo, turystykę, kulturę, sztukę, ochronę zdrowia, edukację, itd. (Gilmore, 2006: 11-13). W firmach usługowych niematerialny charakter produktu powoduje, że osoby zajmujące się marketingiem stoją przed trudnym zadaniem. „Sprzedawanie czegoś niematerialnego opiera się bardziej na składaniu obietnic, zaufaniu, uczciwości…" (Patten, 1997: 18).

Specyfika usług oraz związana z tym odmienna charakterystyka działalności rynkowej powoduje, że zestaw „4P" instrumentów marketingowych jest wzbogacany i rozbudowywany. Dominujący w usługach czynnik ludzki spowodował rozszerzenie zestawu o piąty element, tj. personel (people), obejmujący osoby zatrudnione w firmie, systemy doboru personelu,

szkoleń, motywacji i oceny. Przedstawiciele firmy usługowej kontaktują się często z jej klientami osobiście. Na ocenę tego kontaktu będą miały wpływ cechy zatrudnianego przez firmę personelu. Negatywna ocena personelu stanowi czynnik pogarszający jej pozycję wśród konkurentów. Wykorzystanie pięciu instrumentów tworzy koncepcję „5P" marketingu-mix: produkt, cena, promocja, dystrybucja, personel (product, price, promotion, place, people), charakterystyczną dla sfery usług. Pojawiły się również dodatkowe modyfikacje instrumentowe w usługach, np. koncepcja „7P" obejmująca: produkt, cenę, promocję, dystrybucję, ludzi, świadectwo materialne (physical evidence), czyli materialne elementy otoczenia – budynki, wyposażenie, a także proces świadczenia (process), tj. organizację i technologię procesu świadczenia usług (Pukas, Styś, 2003: 53-54; Żurawik, B., Żurawik, W., 1999: 32-33; Mazur, 2001: 53-54).

Marketing-mix składa się z różnych elementów programu marketingowego. Wykorzystując poszczególne instrumenty i działania oraz współzależności między nimi, można opracować wiele struktur marketingu. Struktura ta powinna być nie tylko wewnętrznie zintegrowana, ale powinna również charakteryzować się wysokim stopniem skuteczności i efektywności. Posługując się instrumentami marketingu-mix firmy muszą pamiętać, iż elementy te tworzą zwarty system i zmiana jednego z nich pociąga za sobą modyfikację pozostałych. Muszą one być również dostosowane do specyfiki konkretnego rynku. Ich wykorzystanie ma na celu umocnienie pozycji produktu na rynku oraz zapewnienie wyższej jakości usług, a tym samym uzyskanie przewagi konkurencyjnej (Payne, 1997: 157-159; Penc – Pietrzak, 1999: 20).

3. Znaczenie personelu w działalności usługowej

W warunkach silnej konkurencji na rynku rola personelu ma szczególne znaczenie w tych dziedzinach, w których produkt nie ma cech materialnych i klienci oceniają jego jakość głównie poprzez zachowanie, wiedzę i umiejętności pracowników mających bezpośredni kontakt z klientem. Personel w momencie pierwszego kontaktu z klientem kreuje obraz organizacji. Pozytywny wizerunek firmy, jej reputacja, zaufanie, jakim jest obdarzana przez aktualnych i potencjalnych klientów, decydują o pozycji firmy na rynku. Klienci kształtują opinię o firmie i jakości usługi na podstawie kontaktów z jej pracownikami.

Personel musi być uwzględniany przez firmy jako ważny element strategiczny. Tworzy on siłę konkurencyjną każdej organizacji. Wzrost znaczenia personelu i jego funkcji promocyjnych podyktowany jest stałym rozszerzaniem się sektora usług i wzrostem oczekiwań nabywców. Kwalifikacje oraz jakość personelu traktuje się w obsłudze klientów jako wyróżnik firmy i główną determinantę jego wizerunku (image) (Wiktor, 2001: 131). Pracownicy powinni stanowić wizytówkę firmy. Nabywca usług zazwyczaj przywiązuje wagę do tego, kto świadczy usługi. Wkładem usługodawcy w usługę jest nie tylko praca, będąca najbardziej znaczącym elementem, ale także postawa pracowników wobec klienta, sposób ich zachowania oraz przebieg procesu świadczenia. Czynniki te wpływają na ostateczną ocenę poziomu świadczonych usług (Pukas, Styś, 2003:77).

Dla zapewnienia wysokiego poziomu usług konieczne jest wykreowanie wśród pracowników orientacji na klienta. Na podstawie bezpośrednich kontaktów z personelem klient kształtuje swójobraz firmy oraz oferowanych produktów. Każde ułatwienie, które spotka klienta ze strony personelu, „obudowuje" produkt dodatkowymi korzyściami. Taki sposób budowy pozycji rynkowej jest jednym z najbardziej efektywnych. Kwalifikacje i umiejętności personelu odgrywają w działalności usługowej szczególną rolę ze względu na różnorodność

usług i kryteria oceny ich jakości. Postawa usługodawcy, podejście do klienta, w tym zdolność wyczucia jego szczególnych potrzeb, stanowią cechy o wielkiej wartości. Dostarczenie klientowi możliwie największej satysfakcji oraz spełnienie jego oczekiwań stanowią główną wytyczną w świadczeniu usług (Kramer, 2004:197-198).

Dokonując doboru pracowników należy pozyskiwać osoby, które bez żadnych oporów będą podnosić swe kwalifikacje zawodowe, rozwijać się, a następnie ulepszać obsługę klientów. Nauka personelu powinna być ciągła, obliczona na zaspokojenie obecnych i przyszłych potrzeb. Odpowiednio wykształcony i zapoznany z misją oraz codziennymi zadaniami personel umożliwia, a nawet gwarantuje ciągły rozwój organizacji (Pajączkowski, 2000:120). W celu zapewnienia odpowiedniego standardu obsługi klientów konieczne jest zatrudnienie osób nie tylko spełniających wymogi w zakresie wykształcenia i doświadczenia zawodowego, ale również uwzględnienie pewnych predyspozycji osobowych niezbędnych w kontaktach z klientami (B. Żurawik, W. Żurawik, 1999:38).

Pracownicy, którzy mają bezpośredni kontakt z klientem powinni posiadać (Kotra, Pysz-Radziszewska, 2004:123):

- dużą wiedzę o atrybutach i korzyściach produktu, o firmie, którą reprezentują oraz o produktach konkurencyjnych;
- umiejętności psychologiczne, polegające na łatwości nawiązywania kontaktów;
- umiejętność łączenia emocji z logiką, wywołania pozytywnych odczuć, wzbudzania zaufania i uważnego słuchania klienta;
- umiejętność wykorzystania empatii;
- uczciwość polegającą na prawości w postępowaniu, rzetelności, otwartości i szczerości oraz lojalności wobec firmy;
- miłą powierzchowność przejawiającą się w stylu bycia, tj. odpowiednim ubiorze, życzliwości i pewności siebie, sposobie komunikowania się z klientem;
- umiejętność prowadzenia rozmowy przez telefon;
- wiarę w produkt, który oferują klientom i w image firmy, którą reprezentują;
- wiarę we własne umiejętności i możliwości sprzedania produktu.

W trakcie obsługi klientów pracownicy najczęściej popełniają następujące błędy (Glanz, 1994: 39):

- okazywanie znużenia, apatia; pracownicy swoim zachowaniem prezentują postawę, którą można wyrazić słowami: „nie dbam o to”; postępują tak na ogół pracownicy, którzy są znużeni swoją pracą, nie utożsamiają się z firmą oraz którym nikt nie przypomina, co jest ich zadaniem;
- omijanie klienta, ograniczanie się do świadczenia podstawowej usługi; taka obsługa nie zawsze zaspokaja oczekiwania klienta, lecz „uwalnia” pracownika od konieczności dodatkowych czynności;
- zimny stosunek względem klienta; pracownicy często bywają nieprzyjemni w kontaktach z klientami, lakoniczni w odpowiedziach na zapytania, nieprzyjaźni;
- automatyczne wykonywanie czynności; każdy klient traktowany jest identycznie; w trakcie obsługi klienta nie ma miejsca na indywidualizację kontaktu;
- brak elastyczności; często zasady obowiązujące w firmie są stawiane ponad satysfakcję klienta; firmy nie tolerują żadnych odstępstw;
- zrzucanie na innych odpowiedzialności za wykonanie prośby klienta, brak chęci pomocy (odsyłanie klienta do innej osoby).

Wszystkie wskazane nieprawidłowe zachowania pracowników bezpośrednio obsługujących klientów niekorzystnie wpływają na wizerunek firmy oraz postrzeganie

produktu. Dlatego też niezwykle istotne jest odpowiednie kształtowanie postawy pracowników. Należy pamiętać o tym, że każdy stracony klient staje się klientem konkurencji.

4. Istota i rola marketingu wewnętrznego

Istotne znaczenie, jakie szczególnie w marketingu usług mają ludzie, przyspieszyło rozwój marketingu wewnętrznego. Jego zadaniem jest pozyskiwanie pracowników, stworzenie właściwych systemów motywacji, jak również zmniejszenie fluktuacji kadr poprzez zaspokajanie ich potrzeb. Każda jego forma umacnia rolę ludzi, jako elementu marketingu-mix i sprzyja tworzeniu organizacji zorientowanej na klienta. Celem marketingu wewnętrznego jest poprawa systemu komunikacji wewnętrznej i zdolności reagowania na potrzeby innych, wzrost odpowiedzialności i wspólnoty celów (Payne, 1997:205, 207-209).

Marketing wewnętrzny kładzie nacisk na zasoby ludzkie, jako kluczowy czynnik sukcesu firmy. Postrzega pracowników jako wewnętrznych klientów firmy. Domeną marketingu wewnętrznego jest wykształcenie pożądanych postaw pracowników oraz stworzenie zintegrowanego zespołu ludzi. Firmy wykorzystują jego koncepcję i specyficzne instrumenty marketingowe, aby zaoferować pracownikom lepszą i bardziej satysfakcjonującą pracę, a dzięki temu zwiększyć swoje możliwości oraz stać się bardziej efektywnym i konkurencyjnym usługodawcą (Pluta-Olearnik, 1999:120-121; Pukas, Styś, 2003:77).

„Marketing wewnętrzny uznaje się za najważniejszą formę działalności w firmach i instytucjach o rozwiniętej kulturze dbania o klienta" (Payne, 1997:59). Przedmiotem jego zainteresowania jest sposób komunikowania się, a podstawowym celem uczulenie na potrzeby wewnętrznego i zewnętrznego klienta oraz usunięcie barier organizacyjnych. Szczególną rolę odgrywają pracownicy firmy związani bezpośrednimi kontaktami z klientami. Od ich wiedzy, umiejętności współpracy, uprzejmości, przyjaznego nastawienia oraz umiejętności doradzania klientom zależy ocena dokonana przez nabywcę. Dlatego też podstawowym zadaniem kierownictwa firmy jest uświadomienie pracownikom, jak ważną rolę odgrywają w kształtowaniu grupy lojalnych nabywców (Fonfara, 1999: 90-91).

Z punktu widzenia marketingu wewnętrznego niezwykle istotne są takie zagadnienia jak (Fonfara, 1999: 91-93):

- system komunikacji wewnątrz firmy,
- współpraca między poszczególnymi komórkami,
- system szkoleń,
- system motywacji.

Pracownicy powinni znać cele i zamierzenia firmy. Informacje mogą docierać do nich różnymi kanałami. Elementem sprawnie działającego systemu komunikacji w firmie powinien być briefing zespołowy, czyli system regularnych spotkań, podczas których przekazywane są informacje pracownikom. Jego celem jest uzyskanie pewności, że pracownicy wiedzą, co się dzieje w firmie. Narzędziem, które znacznie ułatwia i upraszcza system komunikacji i dystrybucji informacji wewnątrz firmy jest Intranet. Firmy, które korzystają z Intranetu, przekonały się, że wewnętrzne strony WWW mogą stanowić łatwo dostępne i modyfikowane miejsce dla publikacji szeregu ważnych i potrzebnych pracownikom informacji. Zastosowanie Intranetu przyczynia się do zmniejszenia kosztów komunikacji. Umożliwia zarządzanie informacją z jednego źródła oraz gwarantuje natychmiastową modyfikację i aktualizację. W razie potrzeby umożliwia ograniczenie dostępu danej grupy lub kategorii pracowników do określonego rodzaju informacji, czy danych. Materiały informacyjne, wytyczne i instrukcje niezwykle przydatne w bieżącej pracy firma może umieścić w Intranecie. Pracownik

w poszukiwaniu danych i informacji może poruszać się po firmowej stronie WWW. Zastosowanie w firmie Intranetu wpływa na efektywność przepływu informacji, na kulturę pracy oraz przyczynia się do znacznego ograniczenia kosztów łączności i oszczędności czasu (Konikowski, 1999:28).

Wprowadzenie marketingu wewnętrznego wymaga również zapewnienia dobrej współpracy między poszczególnymi komórkami firmy. Celem tej współpracy jest osiągnięcie wysokiego poziomu obsługi klienta. Każdy pracownik powinien identyfikować się z firmą i wpływać na kształtowanie jej pozytywnego wizerunku. Pomocne w tym zakresie jest budowanie odpowiedniego klimatu i atmosfery pracy. Jednym ze sposobów są spotkania integrujące oraz sponsorowanie przez firmę imprez rekreacyjnych i sportowych dla swoich pracowników. Istotnym elementem realizacji marketingu wewnętrznego jest system zachęt motywujących pracowników (nagrody, ranking najlepszych komórek w firmie) oraz system ustawicznego szkolenia. Do proponowanych kierunków szkoleń należą (Fonfara, 1999: 93-94):

- rozwój umiejętności komunikacyjnych,
- rozwój umiejętności negocjacyjnych,
- rozwój umiejętności radzenia sobie z klientami w trudnych sytuacjach,
- informowanie o celach i założeniach strategii firmy.

Coraz wyższe wymagania klientów w zakresie świadczeń usługowych, coraz bardziej nowoczesne urządzenia i wyposażenie firm, konieczność stałego pogłębiania wiedzy wymagają od firm właściwego zarządzania zasobami ludzkimi. Czas i pieniądze zainwestowane w pracowników zwrócą się, jeśli firma uświadomi sobie, że w dużym stopniu decydują oni o jej sukcesie. „Im szybciej firmy docenią wkład pracowników w pozyskiwanie i zatrzymanie klientów, tym szybciej firma zdobędzie przewagę konkurencyjną" (Payne, 1997: 205). Wiarygodność na rynku można stracić na wiele sposobów, a jednym z nich jest niekompetentny personel. Dbałość firmy o właściwy poziom wykształcenia personelu wynika z funkcji, jakie pełni on w procesie komunikacji z rynkiem i systemie promocji. Sprzedawcy należą do najważniejszych i najcenniejszych aktywów firmy. Ich wiedza poparta odpowiednim doświadczeniem tworzy przesłanki szybkiej i dynamicznej kariery zawodowej. Nieodpowiednie cechy personelu lub źle wykonana usługa mogą nieodwracalnie zmienić opinię klienta o firmie. Partnerstwo natomiast jest nie tylko bardzo cennym zasobem, ale także czynnikiem, który decyduje o przyszłości firmy. „Im ściślejsza więź przedsiębiorstwa z klientami, tym lepsza jego kondycja finansowa. Im bardziej zadowoleni pracownicy, tym chętniej podwyższają kwalifikacje i tym wydajniej pracują" (Wiktor, 2001: 133, 367-368).

Współczesne wyzwania polegają na tworzeniu takiej kultury obsługi w firmie, aby każdy klient dzięki właściwemu podejściu do niego pracowników, czuł się zadowolony i usatysfakcjonowany (Kotler, 1999: 36). Firmy usługowe coraz częściej doceniają znaczenie więzi z klientami. Do tego typu kontaktów konieczny jest jednak odpowiednio wyszkolony personel. Od jego inwencji i inicjatywy zależy więź z klientem. „Bardzo często umiejętność niekonwencjalnego myślenia i twórcza wyobraźnia pracowników są czynnikami decydującymi o przywiązaniu klienta do firmy" (Gordon, 2001: 346). R. Normann pisze, że działalności usługowej nie znamionuje ani intensywne wykorzystanie kapitału, ani nawet intensywne wykorzystanie personelu, lecz intensywność zaangażowania osobowości pracowników zatrudnionych w świadczeniu usług (Normann, 1991: 17-18).

Niemożliwe jest jednak stworzenie oraz utrzymanie pożądanych relacji między personelem a klientem, jeżeli nie są one zachowane w kontaktach między pracownikami, a ich zwierzchnikami. Niejasność sytuacji będzie powodowała obniżenie jakości usług, motywacji

pracowników, a tym samym satysfakcji klienta. Dlatego też w celu zagwarantowania odpowiednich relacji niezbędne są (Pukas, Styś, 2003: 77-78):

- szkolenia,
- codzienna postawa zarządzających firmą, wspierająca i kontynuująca szkolenia formalne,
- angażowanie pracowników w planowanie i podejmowanie decyzji,
- dwustronny przepływ informacji i komunikacja,
- masowa wewnętrzna komunikacja (zebrania, broszury, plakaty),
- narzędzia administracyjne i zarządzanie personelem (charakterystyka pracy i opis stanowisk, procedura zatrudniania, pensje i inne wynagrodzenia),
- masowa komunikacja zewnętrzna, z którą personel powinien być zapoznany jako pierwszy,
- badania rynku.

Dla wypracowania właściwych zachowań pracowników bezpośrednio obsługujących klientów konieczne jest ponadto stworzenie odpowiedniego systemu motywującego do lepszej, bardziej efektywnej pracy, a także systemu kontroli. Wymagania stawiane pracownikom powinny być poparte odpowiednim poziomem płac. Bez zaangażowania całego personelu i uświadomienia mu, że to klient powinien być w centrum uwagi, niemożliwe jest zorientowanie firmy na klienta. Musi ona swych pracowników traktować jak klientów wewnętrznych i świadczyć im usługi najwyższej jakości. Celem bowiem marketingu wewnętrznego jest stymulowanie personelu w taki sposób, aby w kontaktach telefonicznych, elektronicznych, osobistych oraz korespondencji z klientami możliwie najlepiej reprezentował firmę (Payne, 1998: 59).

Marketing wewnętrzny opiera się na dwóch zasadach (Klisiński, 2001: 145-146):

1. Wszyscy pracownicy są świadomi misji firmy usługowej, jej strategicznych celów i strategii marketingowych. Zarząd firmy powinien najpierw „urynkowić" produkt firmy wśród własnych pracowników, a dopiero potem na rynku. Pracownicy powinni jak najlepiej reprezentować firmę w kontaktach bezpośrednich z klientami zarówno zewnętrznymi, jak i wewnętrznymi.
2. Każdy pracownik i każda komórka firmy usługowej powinni współpracować ze sobą na zasadzie wewnętrznych nabywców i dostawców. Sytuacją optymalną jest osiągnięcie wysokiego poziomu usług świadczonych wzajemnie przez poszczególne komórki organizacyjne i osoby.

Modyfikacja postaw i zachowań pracowników, przyjęcie wspólnych wartości takich jak: oddanie się bez reszty klientowi wewnętrznemu i zewnętrznemu, stawianie klienta i jego obsługi na pierwszym miejscu, nie są możliwe bez energicznego, konsekwentnego w działaniu menedżera-lidera. Reorientacja na klienta wymaga fundamentalnej zmiany sposobu myślenia, postaw, wartości. Ukształtowanie odpowiedniej struktury zatrudnienia jest jednym z fundamentalnych zadań kierownictwa w każdej firmie usługowej (Rogoziński, 2000:115).

Zakończenie

W gospodarce rynkowej przedsiębiorstwa, które chcą wzmocnić swą pozycję konkurencyjną, zmuszone są do zmiany sposobu działania. Przyjęcie orientacji marketingowej i postawienie klienta w centrum zainteresowania wymaga skoordynowania wielu instrumentów marketingowych. W firmach usługowych niezwykle istotnym elementem marketingu-mix staje się personel, który kreuje wizerunek firmy. Jeden niezadowolony klient,

który przekazuje negatywną opinię o firmie i oferowanych produktach może w bardzo niekorzystny sposób wpłynąć na jej postrzeganie na rynku. Menedżerowie powinni zdawać sobie sprawę z tego, że tylko pracownik silnie zmotywowany, zapoznany z misją i wizją organizacji oraz podstawowymi zasadami właściwej obsługi klienta będzie dążył do pozyskania dla firmy jak największej liczby lojalnych klientów oraz utrzymania dotychczasowych.

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MECHANISMS OF ENVIRONMENTAL TAXATION IN TRANSITION GLOBALIZING ECONOMIES

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Abstract. The authors affirm that with the globalization of the world economy it is necessary to introduce the mechanism of environmentally sustainable economic functioning of the country. The article maintains that active use of environmental taxes must help to reduce the overall level of environmental pollution and increase production of environmentally clean products.

Keywords: "green" economy, international integration, environmental taxation.

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Introduction

Environmental taxation remains one of unsolved problems of nowadays. However, according to the scientists, we can establish the formation of the Institute of Ecological Taxes for today. O.O. Veklych, Z.S. Varnaluy, T.P. Galushkyna, V.S. Zagorodskuy, P.V. Melnyk, I.V. Rosputenko, I.M. Sinyakevych, K.I. Shvabuy, V.V. Yurchyshyn investigated theoretical and practical issues in the sphere of environmental taxation.

The mechanisms of environmental taxation has not been worked out completely. The issues require further study in conditions of world economy globalization. The study is based on the use of systematic and integrated approaches to determine the main directions of forming the models of green economy as an element of sustainable development.

The aim of this research is to determine global formation tendencies of environmental taxes to improve the ecological and sustainable development. Accordingly, the goal should be to solve problems such as determining the nature of environmental taxes, their composition and influence on the content of local budgets.

Taxes that are conventionally referred to as "environmental" or «Ecotax» exist in all the developed countries.

According to the European Union the share of environmental taxes in Gross Domestic Product amounted to 2.46% in 2011 that equals to 304 268.34 million euro (Economic Reform Program, 2010).

The idea of environmental taxation appeared in the writings of economist-theorist Pigu, who proposed to charge taxes from enterprises-pollutants and provide subsidies to those who reduce emissions into the environment. Scandinavian countries were the first to begin applying this idea in the eighties. Ecological taxes are considered to be taxes on

environmentally hazardous economic activities there. Proclaiming pro-European integration Ukraine adopted a large number of laws that are directed to protect the environment. First of all, there are such laws of Ukraine as: "Environmental Protection", "Air Protection", "Animal Protection", "Flora Protection", "Ecological Expertise" and codes such as water, land and forest code, as well as the code of Ukraine about minerals. The legislation found it necessary to discipline the actors in the field of environmental protection by setting the environmental tax in the Tax Code of Ukraine.

Natural rent is an income that arises in the process of appropriation of natural gifts. This rent is obtained by those economic actors who have deposits of the relevant minerals at their disposal. The scarcity of natural resources on the market resulted in their rapid prices growing. Cash surplus caused by the price increase goes to the owners of the respective resources only because they have a monopoly on these resources and, consequently, they regulate the admission of other economic entities to production and further use of these resources. The rent would be a godsend for the whole human civilization, if the relations of private property did not envisage the possibility of exclusion of all other economic entities from a given natural resource

The interaction between society and nature is another aspect. Insatiable desire of certain members of society to increase their income continuously by engaging in the economic process more and more natural resources, causes the formation of large amounts of waste, which ultimately worsens the condition of the natural environment. Made profit is at the same time accompanied by environmental losses. Nature can neutralize some of the waste on its own. However, in case when the amount of wastes exceeds the capacity of nature to neutralize them, the pollution of the whole environmental structure may occur. This pollution affects the lives of not only those who exercise the corresponding emissions, but the society as a whole. Thus, we can talk about the emergence of environmental "antirent", which is accompanied by the excessive use of natural resources and excessive pollution of the environment.

According to Section 14.1.57 of the Tax Code, the environmental tax is the national compulsory payment levied on actual emissions to air, discharges into water pollution, waste disposal, the actual amount of radioactive waste temporarily stored by the manufacturers, the actual amount of radioactive waste generated and the actual volume of radioactive waste accumulated before 1 April 2009 (Tax Code of Ukraine, 2010).

In accordance with § 240.1 of the Code, taxpayers are entities, which do not conduct economic (business) activities, government agencies, public and other companies, institutions and organizations, permanent establishments of non-residents, including those that perform agent (representative) functions in respect of non-residents or their founders, which are engaged in the emission of pollutants into the air from stationary sources of pollution, discharges of pollutants directly into the water, waste disposal in specially designated areas or at sites other than the location of certain types of waste as secondary raw materials, the generation of radioactive waste (including already accumulated ones), interim storage of radioactive waste influencing the territory of Ukraine within its continental shelf and exclusive (maritime) economic zone.

Recently the development and improvement of the economic mechanism of environmental activities has been carried out in Ukraine, primarily, by the efforts of the Ministry of environmental protection of Ukraine. One of the most important ecological-economic instruments of environmental activities in Ukraine is the fees for pollution of the

environment and the system of the respective funds, which were formed on basis of payments for natural resources.

Licensing system of Ukraine covers all areas of environmental management. The greatest number of permits are issued to enterprises, institutions and organizations in the field of waste management facilities and operations handling hazardous substances.

The environmental charges are imposed on legal entities and individuals that contribute to the degradation of the environment. The objects of environmental taxation are the factors that have direct and indirect impacts, as well as the goods and services that are, or can cause environmental action.

Now the objects of environmental taxes are the energy products, transport equipment and transportation services, volumes of emissions in atmosphere and water, ozone depleting substances, and some scattered sources of water pollution, waste and noise. Numerous groups of environmental taxes related to energy, transport and waste recycling are made up in the EU.

Many European countries have introduced environmental taxes on product which limits the production and consumption of environmentally hazardous, resource-intensive products, and products that are made from rare natural resources. Environmental tax on product is a tax levied on any product, whose production pollutes the environment in one of the periods of the cycle of operation.

Foreign practices of environmental taxation demonstrate the effectiveness of this tool. Environmental taxes are a component of the prices of products, which cause environmental harm, and consumers seem to pay the society an indirect tax for the use of environmentally "dirty" products. Characteristically, the introduction of essential ecological tax on such products eventually displaces it from the market completely.

"Environmental" component of the domestic fiscal system is represented by:

1) rent payments;

2) payment for the land;

3) the fee for exploration;

4) payments for special use of natural resources;

5) environmental tax (the tax for pollution of the natural environment), which are nation-wide mandatory fees.

You should pay attention to the fact that in Ukraine almost all types of payments in the form of fees, collection and payments related to natural resource use and environmental protection, in spite of their fundamental difference in economic substance and in terms of sources of financing of environmental activities, have the character of tax revenues and are actually ways to increase funds in the revenue part of state budget.

In Ukraine there are no certain groups of environmental taxes that are inherent to the tax system in EU countries. They are as follows 1) the so-called deferred payments, contributing to cover environmental costs (earmarked charges are tax on noise pollution, batteries, income from livestock and others); 2) so-called stimulating commodity, product, or environmentally consumptive goods, which are potential environmental pollutants (incentive charges are taxes on pesticides, detergents, plastics, certain types of fuel, transportation).

The main difference between domestic resource taxation system and the European one is that implementation mechanisms are not completed to address environmental problems and do not create significant incentives for economic agents to environmentally friendly actions. It is clear that a purely fiscal mechanism for collecting funds from nature, ignoring the

regulations, restrictive and stimulating functions, is not conducive to the efficient use of natural wealth.

The distribution of the environmental tax is made under the Budget Code in such way: 53% for special state budget and 47% to the Special Fund of local budgets. Thus 33% of the proceeds of the special fund of the state budget allocated for the financing of targeted ecological modernization projects. Financing of the nature reserve fund is made from local budgets as a residual.

According to the scientists, nowadays we can see the increasing trend of the role of environmental taxes and stimulating activities for economic development in industrialized countries, where the share of environmental taxes in total tax system is as follows: Austria - 4,4, Canada - 4.5, Denmark - 3.4, Finland - 7.3, France - 5.4, Germany - 4.9, Greece - 6,1, Ireland - 11.9, Italy - 9.0, Japan - 6.5, Netherlands - 5.5, New Zealand - 6.1, Norway - 10.8, Portugal - 11.5, Spain - 7.5, Sweden - 6.3, Switzerland - 4.7, UK - 8.2 USA - 3.2.

The relevance of the use of environmental taxes in Ukraine makes to refer to the experience of countries where the use of such taxes is successful. Of course, you need to pay attention to the important changes that took place in fiscal systems in developed countries that are now designated by the term "greening".

"Greening" of the fiscal system is an effective means of making success at the same time achieving two major national goals – the revenue of state budget and solving the problems of the environment. In terms of rational criteria for the usefulness of environmental taxes the changes in behavior of economic entities are achieved, which lead to the abandonment of environmentally harmful goods and activities. There is the formation of potential of reducing tax revenues and increasing environmental impact as a result.

Taking into account the experience of countries with developed market economies, the active use of environmental taxes helps to reduce the overall level of pollution of the environment. Moreover, placing an additional financial burden on businesses, environmental taxes help to reduce the costs of pollution control and increase production of new, environmentally friendly products, as well as promote competitiveness and economic position of producer.

The tax on the product is used to increase the financial resources necessary to reduce the environmental harm caused by a product that is taxed. The accumulated funds including taxes are targeted at providing financial support to specific environmental programs and reducing pollution by these types of products. As a result of cost redistribution of financial flows "re-investment income" is derived from the environmental taxation. Thus, other countries have managed to prove ecological and economic impact of environmental taxes and dispel suspicions that it is just another way to increase payments to the budget. Taking these facts into consideration, the importance of introducing such a mechanism of environmental taxation in Ukraine is obvious.

The current economic mechanism of environmental regulation in Ukraine is based on the concept of payment for environmental safety. Benefits of the economic mechanism of environmental management are based on the fact that economic instruments provide basic payments for nature exploiting being the only tool that allows to provide earnings of financial resources in the amounts necessary to eliminate the effects of environmental pollution (Tax Code of Ukraine, 2010).

“Greening” of the tax system is being currently developed due to two trends in the practice of environmental taxes in developed countries. Formation of the subsystem of tax entities environmental fees and stimulating or deterrent nature of charges is the first

traditional approach to the organization of environmental taxation. Multichannel tax system characterized by a large number of taxes and fees is more effective than single-channel single tax and the use of a broad tax base and differential tax rate has a moderate pressure on the companies. The second trend is manifested in the abolition of most payments designed to target conservation funding like in the Netherlands and France. Environmental taxes that are paid into general state budget, are introduced instead of environmental fees and charges. So we can see the process of gradual transformation from targeted environmental payments to the taxes that have fiscal function by combining a number of fees and charges, the "only tax for activities that cause environmental pollution" (Tax Code of Ukraine , 2010).

Trends of environmental taxes in developed countries are directed to strengthening its fiscal properties to centralize financial resources for national environmental programs and decrease the activation of the stimulatory function at the micro level.

The main trends of environmental taxation in Ukraine should be those, which are able to reorient the effect of fiscal instruments from maintenance of environmental pollutants "redemption" to earning incentives in the form of benefits for industrial production, to produce environmentally clean products that correspond to international environmental standards and do not cause negative impact on the environment and health of staff.

These areas are the following:

a) further intensification of the environmental fees and charges stimulatory function and orientation to achieve optimal value in spending targeted financial resources between national environmental programs and its decentralized use in the real economy;

b) combination of stimulating nature of environmental taxes and payments with other financial measures of providing methods to improve the environmental safety of production, such as tax incentives, loans for environmental projects, environmental insurance, penalties for violations of applicable environmental legislation.

Countries that have achieved the greatest success in the development of environmental taxation, are Norway, Sweden, Finland, Denmark, the Netherlands and the United States.

Denmark is a prime example of an effective system of environmental taxes. This country is one of the recognized leaders in the use of environmental taxes to deal with wastes. The tax instruments of Denmark include a tax on waste disposal, taxes on the product, and a system of "bail-return", which is not usual for us in "Tax" form.

However, the Danish system of environmental taxes on waste is one of the most efficient in the world. Convincing figures are the following: only 12.5% of the waste generated in the country at the landfill was not removed in 2011, and this share is reducing. In this case, the tax rate is set according to the degree of environmental acceptability of the method of waste management. Waste producer shall pay DKK 375 (EUR 50.34) for every ton of waste that is subjected to disposal in landfills while a ton of waste that is incinerated costs 330 DKK. Thus the tax on recycled or re-used waste had is not charged.

According to the Danish Environmental Protection Agency, environmental taxes are the most important economic instruments of waste management. The experience of Denmark indicates that environmental taxes can be successfully used to solve the waste problem. The significant economic and environmental effect is achieved which indicates the processing of more than 60% of the waste. Thus, at the beginning of the 21st century 7 million 285 thousand tons of waste were processed from 11 million 855 thousand tons of waste generated in of Denmark, 3 million 64 thousand tons were burned and 1 million 489 thousand tons were disposed in landfills. This is a weighty environmental achievement of environmental taxes. The factors that led to the high efficiency of environmental taxes in respect of waste in

Denmark are their scientific validity, the sequencing of environmental and economic policies, combined with other equally important ecological, economic, administrative, legal and educative tools of environmental policy (Economic Reform Program, 2010). Considering all abovementioned, we must implement this experience in Ukraine more effectively.

The effectiveness of the environmental tax depends on the ability to define a satisfactory basis for payments. The main problems with the definition of taxable items are related to taxes on resources and final products and similar to taxes on sales and excise taxes. Determination of the base of environmental taxes on emissions, discharges or location of solid waste raises the problems of its measuring and monitoring (Law of Ukraine: The environmental protection, 1991). One of the characteristic features in the case of taxes on discharges is that substances which don't have intrinsic value are taxed. If resources or finished products are the subjects of taxation, then there is a certain amount of taxable items. Goods may be taxed in the production and sales. Moreover, most of the finished products and resources have identified standards and economic instruments to measure them. Discharges and emissions are much more difficult to determine, because not only emissions are important, but also their constituents (contaminants). Thus the determination of taxable amount of emissions and discharges should include a specific set of measurement and standard procedures which would ensure the uniqueness and validity of the tax use.

Environmental taxation is generally considered mechanisms to counteract competition in international markets, a mechanism that reduces the competitiveness of the state because of the costs of environmental measures.

Results of the study of the current state of the system of resource taxes in Ukraine made it possible to single out certain contradictions and summarize the problems of its functioning. Above all are:

- leveling in tax revenues as the main tool of domestic financial system of nature and environmental protection;
- existence of a significant gap between the proclaimed principle of "polluter pays" fees and standards formation for the pollution, on the one hand, and the amount of damages and the actual costs for reimbursement, on the other;
- absolute figures understating norms of payments for special use of natural resources and fees for environmental pollution;
- depreciation charges for special use of natural resources and fees for environmental pollution;
- profound differences in marginal tax rates on pollution standards;
- complex cumbersome calculations of environmental and natural resource payments, instability of statistical reporting system and control of natural resources accounting data and revenue accounting of payments;
- non financial legal aspects.

Thus, the current environmental tax system of Ukraine needs further reforming and development aimed at reducing the negative impact of the national economy on the environment, natural container unit of GDP, to stimulate the transition to sustainable development.

The basic elements of the natural resource management will continue to remain fees, payments for the special use of natural resources (minerals, water, land, forest, biological), charges for environmental pollution. Tax levers as penalties for violations of environmental laws are ignored. Consequently, state budget and extrabudgetary funding environmental activities important functional elements of economic environmental control systems remain.

Building an effective economic mechanism should be grounded on the basis compensation that provides restoration of natural resources, environmental management and regulation of their use.

Conclusions and suggestions

Strategic vectors improving legislative and regulatory fields along the path of the principles of natural resource management should establish effective natural resource management and consider the feasibility of more prudent planning in this area, which, first of all, must destroy the existing imbalance between resource revenue and losses for environmental purposes, secondly, determine the lower limit of regulatory indicators in the state (local) budgets, thirdly, establish permanent "feedback" in this context.

Gained experience in international practice and directions for environmental policy show that the unified system of taxation and charges may be a progressive form of regulation in our country in dealing with issues related to improving of the environmental management. In this respect, it is necessary to implement tax reform, which is based on the gradual transition from the existing fines to direct natural-resource taxation. Moreover, it is perspective to use the system of tax exemptions and tax rules that exist in foreign countries regarding stimulation of environmentally clean, safe products production. As for the production of environmentally hazardous products and goods, they must limited.

Thus, a new socio-ecological approach is necessary in justifying the size of the environmental tax which should take social, economic and environmental requirements into account. However, the main criterion in determining the environmental tax should be correlation between needs of society and opportunities of nature. As demand and supply of natural resources in different parts of the globe are not the same, the environmental tax should be geographically differentiated taking into account the heterogeneity of the environment and human impact on it.

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THE RESEARCH OF THE GLOBAL COMPETITIVENESS CHANGES OF THE BALTIC STATES

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Abstract. The research is based on the results of the assessement of the „Global Competitiveness Index" introduced by the World Economic Forum. In this article there are explained the principles of index formation. The research of the global competitiveness of Latvia, Lithuania and Estland in 2009-2017 is carried out analyzing the changes in the dynamic of the competitiviness index of these states and the changes of their positions in the total competitiveness ranking. There are also determined the similar and different trends of the development of the index in each country and the factors that have influenced them.

Keywords: Competitiveness**,** Global Competitiveness Index, Baltic States.

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Ievads

Globalizācijas laikmetā, vārds *konkurētspēja* iegūst arvien būtiskāku nozīmi. Interese par to nav sveša nevienā valstī, jo nacionālās ekonomikas darbības rezultāti ir atkarīgi no tās sekmīgas iekļaušanās starptautiskajā tirgū.Tā rezultātā ir attīstījusies industrija, kas mēģina novērtēt un salīdzināt atsevišķu valstu konkurētspēju. Ir izveidoti konkurētspējas indeksi– kompleksi indikatori, kas aprēķināti izmantojot noteiktus kritērijus un to mērījumus atsevišķās ekonomikās. Tie ļauj ierindot pētījumā iekļauto valsti noteiktā vietā, salīdzinot ar pārējām, unnovērtēt tās attīstību notiktā laika periodā. Atkarībā no ziņojumurezultātiem un izmantotajiemrādītājiem vietu sadalījums ir saprotams ne tikai ekonomikas jomas speciālistiem, bet arī ar to mazāk saistītiem interesentiem. Tas ir iemesls, kāpēc šādi reitingi ir guvuši plašu interesi, līdz ar to arī atspoguļojumu masu informācijas līdzekļos.

Lai arī reālo indeksu ietekmi ir grūti novērtēt, populārākie no tiem jebkurā gadījumā rada interesi – tos citē valdības ziņojumos, prezentācijās un masu mēdijos. Sniegumu analizē valsts iekšienē, pamatojoties uz rezultātiemvērtēpolitiķu darbu.

Neskatoties uz rezonansi, lietotājiemnereti ir vājš priekšstats par to,ko indekss reāli nozīmē, kāda ir tā aprēķināšanas metodika un kā ir interpretējami rezultāti.

Tādēļ ziņojumauzdevumi ir:

- Aprakstīt viena no populārākajiem indeksiem "*Globālās konkurētspējas indekss*" (Global Competitiveness Index) aprēķināšanas metodiku;
- analizēt Latvijas reitinga izmaiņas Baltijas valstu kontekstā periodā no 2009. līdz 2017. gadam;
- izvirzīt secinājumusnacionālās politikas veidošanai.

Ziņojuma izstrādāšanai tiks izmantotas monogrāfiskā, loģiski – konstruktīvā un datu grafiskā metode.

Globālās konkurētspējas indeksa aprēķināšanas metodika

Konkurētspējas koncepcija dažbrīd rada diskomfortu, pat nopēlumu daudzu ekonomistu vidū. Būtiskākais iemesls ir konkurētspējas biežais salīdzinājums ar sacensībām, kurā atsevišķidalībnieki tiek salīdzināti. Šāda salīdzināšana paredz, ka ir ieguvēji un zaudētāji. Konkurētspēja tiek uzlūkota kā sporta sacensības, dalībniekiem sacenšotiesekonomikas disciplīnā. Šāds viedoklis par konkurētspēju ir populārs uzņēmējuvidū. Nespēja konkurēt radazaudējumusvai pat bankrotu. Šo uzskatu virza arī masu mēdiji.

Konkurētspēja nozīmeatšķiras dažādiem cilvēkiem. Ir svarīgi noteikt konkurētspējas dažādos līmeņus:

1. darbinieku līmenī;
2. uzņēmumu līmenī;
3. nozares līmenī;
4. nacionālās tautsaimniecības līmenī.

Katrā analīzes līmenī, ir dažādi pasākumi konkurētspējas uzlabošanai. Tie atšķiras, bet rezultātānosaka pašreizējos un nākotnes ekonomiskos panākumus un labklājības pieaugumu atsevišķām nozarēm vai tautām. Akadēmiskajā literatūrā termins *nacionālā konkurētspēja* tiek izmantots trijos galvenajos veidos: ražīguma mēraukla, relatīvo izmaksu rādītājs un tirgus daļas īpašās „stratēģiskās" nozarēs.

Eiropas konkurētspējas ziņojums 2011 konkurētspēju definē šādi."Konkurētspējīga ir tāda tautsaimniecība, kura ilgtspējīgi paaugstina dzīves līmeni un nodrošina iespēju strādāt tiem cilvēkiem, kuri to vēlas. Konkurētspējas saknes ir institucionālās un mikroekonomiskās politikas kārtība, kas nodrošina apstākļus, kādos var rasties un attīstīties uzņēmumi un tiek atalgots individuālais radošums un sasniegumi. Citi faktori, kas atbalsta konkurētspēju, ir makroekonomiskā politika, kas veicina drošu un stabilu ekonomisko vidi un pāreju uz zema oglekļa un resursu efektīvu tautsaimniecību. Visbeidzot, konkurētspēja nozīmē ražīguma paaugstināšanos, jo tas ir vienīgais veids, kā panākt ilgstošu ienākumu (uz vienu iedzīvotāju) kāpumu, kas savukārt paaugstina dzīves līmeni (*European Competitiveness Report 2011).*

Jēdziens "konkurētspēja"ekonomikātiek izmantots plašā nozīmē. Sākotnēji to lietot, lai raksturotu valsts konkurētspēju makroekonomiskā līmenī.Šajā gadījumā aktuāli ir tādi rādītāji kā reālais valūtas kurss un valsts ārējās tirdzniecības situācija. Pašlaik konkurētspēju pamato ar strukturālajiem faktoriem, kas nosaka atsevišķastautsaimniecībasattīstību vidējā un ilgā laika posmā.M.Porters WEF definē, ka „pasaules ekonomika nav „nulles spēle" – vienas valsts panākumi nav jānodrošina uz citas valsts rēķina. Citiem vārdiem sakot, konkurētspēja nenozīmē valsts daļu produktu un pakalpojumu tirgū (*Ovalli, 2014)*. Tāpat ir jāsaprot, ka konkurētspējas zudumunevajag izmantot kā argumentu, lai pamatotu iejaukšanos tautsaimniecībā, kritizējot (īstermiņa) tirgus apstākļus. Kā piemērus var minēt rūpniecisko politiku, „konkurējošās devalvācijas" un dažādās subsīdijas. Tomēr, lai izprastu iekšzemes ražīgumu un tā noteicošos faktorus, informatīva ir kritēriju salīdzināšana ar citām valstīm – tā daudzkārt ir šajā ziņojumā izmantotā metodoloģiskā pieeja.Rezultātā svarīgākais uzdevums tautsaimniecības attīstībai ir veidot apstākļus ilgtspējīgai izaugsmei.

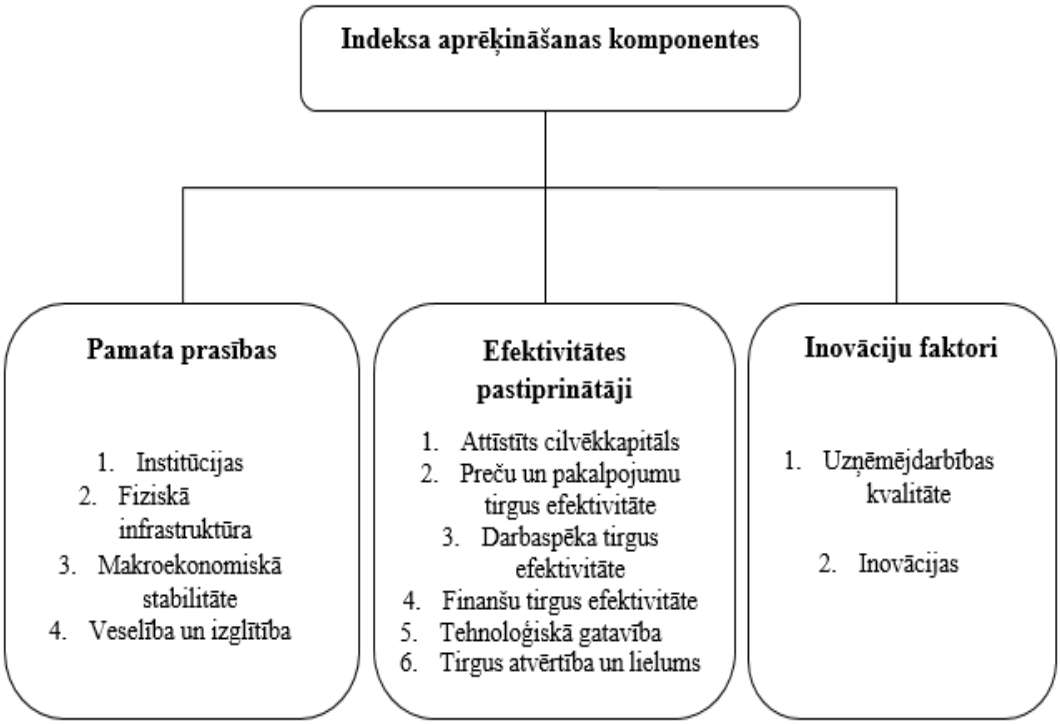
Mūsdienās valda uzskats, ka labklājību determinē ekonomikas produktivitāte, ko nosaka saražoto produktu vērtība uz vienu patērēto resursu vienību. Produktivitāte ļauj ekonomikainodrošināt augstuatalgojuma līmeni, saistībā ar to arī augstu dzīves līmeni. Stabila makroekonomiskā situācija rada iespējas labklājības izaugsmei, bet patēriņa labumiīstenībā tiek radītimikroekonomikasjeb uzņēmumu līmenī,ja uzņēmumi spēj radīt produktus,

izmantojot efektīvas metodes. Pamatojoties uz šo konceptu, Pasaules ekonomikas foruma (WEF) eksperti izstrādā "Globālās konkurētspējas indeksu" (GCI).

2004. gadā ieviestais (GCI) apvieno mikro- un makrovidi raksturojošos rādītājus, jo paši autori (Xavier Sala-I-Martin (Columbia University) un Elsa Artadi (Harvard University)) atzīst, ka abas vides ir neatraujami saistītas, līdz ar to (GCI) ietver abas vides raksturojošus indikatorus.(GCI) veido 12 pīlāri jeb faktori, kas rezultātā arī nosaka valsts globālo konkurētspēju (1. attēls). Šie faktori nosacīti iedalāmi trīs grupās. Ekonomiskā politika var tieši ietekmēt daudzus šos faktorus, bet rezultāti ražīguma vai labklājības ziņā ir tirgus procesu beigu rezultāts, kurā iesaistīti daudzu uzņēmumu un indivīdu lēmumi un darbības.

Makroekonomiskie konkurētspējas faktori ietver divas atšķirīgas sastāvdaļas. Pirmkārt tie raksturo institucionālo kvalitāti, otrkārt, tie aptver makroekonomiskās politikas kvalitāti. Institucionālā kvalitāte nodrošina kritisku kontekstu indivīdu spējai iesaistīties tautsaimniecībā un gūt radīto vērtību. Institucionālā kvalitāte nosaka arī kontekstu, kur atrodas valsts likumdošana, kas ietekmē visas konkurētspējas dimensijas.

Mikroekonomiskās politikas īstenošanasrezultātiem ir būtiska ietekme uz uzņēmējdarbības īstermiņā. Atsevišķos gadījumosmikroekonomikas faktori (ražošanas faktoru tirgi, darbaspēka prasmes un izglītības sistēma, demogrāfiskās izmaiņas, pieprasījums produktu tirgū) pārsniedz makroekonomikas pamatfaktoru ietekmi. Makroekonomiskās politikas īstenošanasrezultātiun pārskatāmība nākotnes periodiem,ietekmē uzņēmumu vēlmi veikt ilgtermiņa investīcijas, līdz ar tonoteikt tautsaimniecības attīstību un tās konkurētspējuilgākā termiņā.



1.attēls.Globālās konkurētspējas indeksu veidojošie faktori (*Bondareva, Tomčík,2015)*

Pamata prasības

1. Institūcijas

Sabiedriskās institūcijas veido vidi, kur uzņēmumi un valsts mijiedarbojas,rezultātā tās nozīmīgi ietekmē tautsaimniecības konkurētspēju un ekonomisko izaugsmi kopumā. Institucionālā vides nosaka, kādā veidā sabiedrībā sadalās ienākumi un arī izdevumi, kas rodas, īstenojot attīstības programmas. Šī vide būtiski nosaka investīciju piesaisti un uzņēmējdarbības aktivitāti. Ražošanas faktoru īpašnieki neieguldīslīdzekļus modernizācijā, bet ārvalstu investori neinteresēsies parlīdzekļu izvietošanu, ja tiem netiks nodrošināta īpašuma neaizskaramība. Būtiska ir atbilstoša valdības attieksme pret tirgu un savas darbības organizēšanu: pārmērīga administratīvā iejaukšanās, nesamērīgi liels un birokrātisks kontroles mehānisms, korupcija, veidojot valsts iepirkumus, nepietiekama uzraudzība vailikumdošanas sistēmas nepastāvība un politiskā atkarība radapapildus izmaksasuzņēmējiem.(*Ovalli, 2014)*

2. Fiziskā infrastruktūra

Labi attīstītai infrastruktūrai ir būtiskaloma tautsaimniecības funkcionēšanā. Tā ir nozīmīgs faktors, kas determinē uzņēmumu atrašanās vietu, to kādas tautsaimniecības nozares vai veidigūs labākas iespējas nākotnes attīstībai. Attīstīta transporta infrastruktūra ļauj optimizēt loģistikas procesus, kā arī sekmē nacionālāsekonomikas saikni ar citu valstu tirgiem. Infrastruktūrasekmē darbaspēka migrāciju atbilstošāku darbavietu meklējumos. Tautsaimniecība ir atkarīga no pietiekošām un izmaksu ziņāatbilstošām enerģijas piegādēm, kas nosaka stabilu un konkurētspējīguuzņēmumu darbību. Mūsdienās sekmīga uzņēmējdarbība nav iedomājama bez attīstītītas telekomunikāciju nozare, kura nodrošina nepārtrauktas informācijas plūsmas. (*Ovalli, 2014)*

3. Makroekonomiskā stabilitāte

Lai arī makroekonomiskā stabilitāte nepalielina produktivitāti, makroekonomiskais nestabilitātebūtiski bojā uzņēmējdarbības vidi. Tirgus dalībniekiem ir sarežģītirīkoties cenu nestabilitātes apstākļos. Valsts nevar pietiekaminodrošināt sabiedriskos labumus, ja tai ir ierobežoti budžeta apstākļi un ierobežotas aizņemšanās iespējas. Iepriekšminētais nosaka, ka tautsaimniecība nevar attīstīties, ja makroekonomiskā vide nav stabila un labvēlīga.(*The Global Competitiveness Report)*.

4. Veselība un izglītība

Veselam un kvalificētam darbaspēkam ir būtiska loma valsts konkurētspējā un produktivitātē. Darbinieki ar vāju veselību rada papildus izmaksas uzņēmējiem un valsts budžetam.Ieguldījumi veselības aprūpes sistēmā ir svarīgigan ekonomisku, gan morālu apsvērumu dēļ. Ir pierādījies, ka sabiedrībās ar augstāku izglītības līmeni, labāks ir arī kopējais sabiedrības veselības stāvoklis. (*The Global Competitiveness Report)*.

Efektivitātes pastiprinātāji

1. Attīstīts cilvēkkapitāls

Modernai un atbilstošai izglītībai un profesionālai sagatavošanai ir būtiskākā nozīme tautsaimniecības attīstībai.Produkcijas ar augstu pievienoto vērtību ražošanai izšķirīgs ir intelektuālais ieguldījums. Globalizācijas procesi nacionālajām ekonomikām liek veidot tādu darbinieku rezerves, kas var ātri piemēroties mainīgajos tirgus apstākļos.(*The Global Competitiveness Report)*.

2. Preču un pakalpojumu tirgus efektivitāte

Efektīvs preču un pakalpojumu tirgus ļauj valstīm ražot nepieciešamo preču un pakalpojumu sortimentu, ņemot vērā piedāvājuma un pieprasījuma apstākļus. Turklāt tāds

tirgus nodrošina, ka preces tiks pārdotas un pirktas visefektīvākā vidē. Veselīga tirgus konkurence iekšējā un ārējā tirgū ir svarīga, lai paaugstinātu tirgus efektivitāti un biznesa produktivitāti. Savukārt tas nodrošina izdzīvošanu visefektīvākajām firmām, kas ražo tirgum nepieciešamas preces. Lai izveidotu preču apmaiņai vislabvēlīgāko vidi, biznesa attīstībai ir jābūt pēc iespējas mazāk šķēršļu, kas rodas kā valsts iejaukšanās sekas, kā arī mazāk ierobežojošu un diskriminējošu noteikumu ārvalstu īpašniekiem vai tiešām ārvalstu investīcijām. (*Zadorožnaja, 2010)*.

3. Darbaspēka tirgus efektivitāte

Darba tirgus efektivitāte un elastība ir nepieciešama, lai darbinieki varētu ātri pārvietoties no viena tautsaimniecības sektora uz citu, kas garantē efektīvāku to pielietojumu tautsaimniecībā. Darbiniekiem rodas iniciatīva un pieaug darbības motivācija.(*The Global Competitiveness Report)*.

4. Finanšu tirgus efektivitāte

Efektīvs finanšu tirgus sniedz iespēju izvietot resursus, ko ir ieekonomējuši valsts pilsoņi vai investējušas citas valstis, tur un tām vajadzībām, kur šie resursi ir visproduktīvākie. Attīstīts finanšu tirgus novirza resursus nevis tiem, kam ir politiskie sakari, bet gan visefektīvākajiem uzņēmējiem vai investīciju projektiem ar visaugstāko gaidāmo peļņu, kas paredz rūpīgu risku izvērtēšanu. Vēl vairāk, pareizi funkcionējošs finanšu tirgus sniedz biznesmeņiem un uzņēmējiem preces un pakalpojumus atbilstīgi viņu finanšu vajadzībām no šādiem avotiem: kredīti, aizņēmumi uz fondu biržu un riska kapitāla rēķina.(*Zadorožnaja, 2010)*

5. Tehnoloģiskā gatavība

Šajā faktoru grupā tiek novērtēts ātrums, ar kādu tautsaimniecībaievieš un pielietomodernās tehnoloģijas, lai paaugstinātu savu uzņēmumu produktivitāti. Mūsdienās piekļuve jaunajām tehnoloģijām ir kļuvusi par nozīmīgākouzņēmumu konkurences priekšrocību.(*The Global Competitiveness Report)*.

6. Tirgus atvērtība un lielums

Šo rādītāju 75% veido iekšējā tirgus lieluma novērtējums un 25% ārējā tirgus lielums. Iekšējā tirgus lielums tiek aprēķināts, izmantojot naturālo logaritmu no iekšzemes kopprodukta summas Iegūtie dati tiek vienādoti no 1 līdz 7. (*The Global Competitiveness Report)*. Šajā sastāvdaļā Baltijas valstis, kas ir nelielas gan teritorijas, gan iedzīvotāju skaita ziņā, nevar sasniegt izcilus rezultātus. Visas trīs valstis negatīviietekmē tirdzniecības sankciju ieviešana attiecībās arKrieviju. Tirgus diversificēšana ir vienīgais iespējamais risinājums.

Inovāciju faktori

1. Uzņēmējdarbības kvalitāte

Biznesa attīstības līmenis attiecas uz valsts vispārējo biznesa tīklu kvalitāti, kā arī atsevišķu uzņēmumu operāciju un stratēģiju sarežģītību. Kad kompānijas un piegādātāji ir apvienoti grupās (klasteros) un ģeogrāfiski atrodas tuvu cits citam, efektivitāte aug, rodas vairāk iespēju inovācijām, samazinās barjeru skaits, kas traucē veidoties jauniem uzņēmumiem.(*Zadorožnaja, 2010)*

2. Inovācijas

Pasaules Ekonomikas foruma eksperti uzsver, ka "Ilgtermiņa perspektīvā efektivitātes palielināšanos un dzīves līmeņa paaugstināšanos var sasniegt tikai uz tehnoloģisko inovāciju rēķina". Šim nolūkam ir nepieciešama inovācijām labvēlīga vide, ko atbalsta valsts un privātais sektors. Tas nozīmē, ka ir nepieciešamas pietiekami lielas investīcijas zinātniskajiem pētījumiem, īpaši biznesa vidē.(*The Global Competitiveness Report).*

Kopumā indeksu veido 113 mainīgie, kuri detalizēti raksturo pētījumā iekļautās valstis, bet jāņem vērā,ka tās atrodas dažādos ekonomiskās attīstības līmeņos. Atkarībā no valsts attīstības līmeņa,(GCI) aprēķināšanā mainās katras faktoru grupas nozīmība*(Bondareva, Tomčík,2015)*.

Dati indeksa aprēķināšanai tiek iegūti gan no publiski pieejamiem statistikas avotiem (1/3), gan uzņēmēju aptauju datiem (2/3).

Par datiem atzīmējamas vairākas lietas:

- *Aptauju datu lietojums gadījumos, kad pieejami statistikas dati*. Ja pieejami statistikas dati, ir jābūt ļoti stingriem argumentiem, lai to vietā lietotu aptauju datus.
- *Uzņēmumu vadītāju informētība*. Lai dotu pilnvērtīgas atbildes, pēc kurām valsts tiks salīdzināta ar citām, respondentiem jābūt labi informētiem par vietējo situāciju.
- *Vai jautājumi un apgalvojumi ir pietiekami skaidri noformulēti un vai dažādās valstīs tie tiek saprasti vienādi?*
- *Atbildes ietekmēs arī tāds fakts kā tautas mentalitāte un kultūra.*

Ņemot vērā šos minētos punktus, jābūt uzmanīgiem, interpretējot aptaujasrezultātus. Faktiski konkurētspējas indeksu nosaka tas, ko valsts uzņēmēji domā parkonkurētspēju, nevis kāda tā ir saskaņā ar statistiku.*(Vanags, Leduskrasta, 2005)*

Baltijas valstu globālās konkurētspējas izmaiņas laika periodā no 2009.līdz 2017.gadam

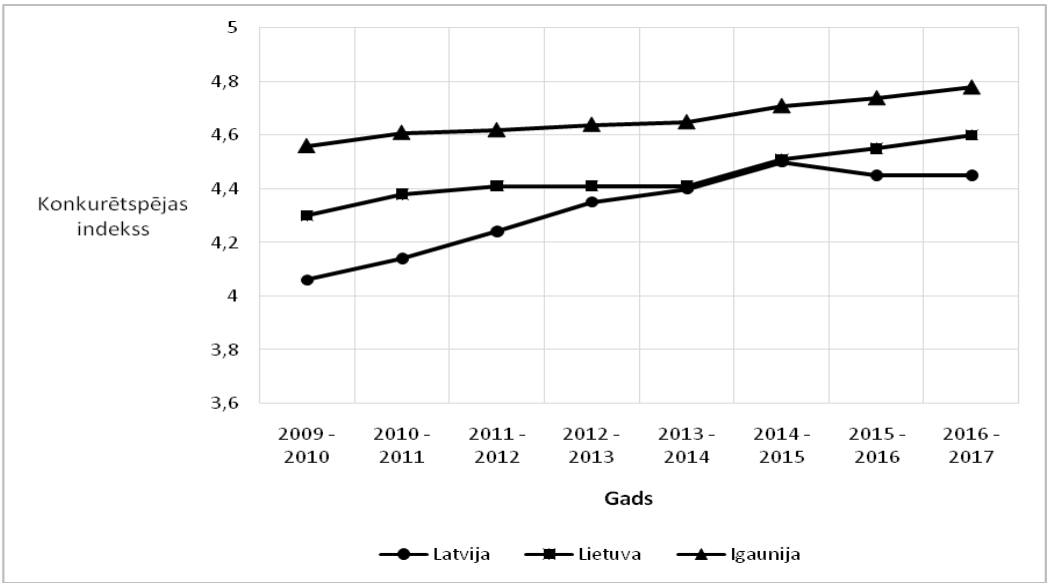
Konkurētspējas paaugstināšana ir svarīgs tautsaimniecības uzdevums vispārējas globalizācijas laikmetā. Konkurētspējas analīze ļauj novērtēt dažādu valsts konkurētspējas priekšnosacījumus salīdzinājumā ar citām valstīm un labāk noteikt nepieciešamo reformu virzienus un arī izvirzīt prioritātes.Analizēt valstu konkurētspējas izmaiņas, izmantojot Pasaules ekonomikas foruma ziņojuma rezultātus, var vairākos aspektos. Turpinājumā, raksturojot Latvijas, Lietuvas un Igaunijas konkurētspējas izmaiņas, tiks aplūkota valstu konkurētspējas indeksa izmaiņu dinamika (2.attēls) un to izmaiņu dinamika kopējā valstu konkurētspējas reitingā (3.attēls).

Globālās konkurētspējas ziņojums 2009.–2010. gadam, ar ko plašāka sabiedrība tika iepazīstināta 2009. gada septembra sākumā, ir tapis pasaules sabiedrībai ļoti sarežģītā brīdī – globālās ekonomiskās krīzes laikā, ko pasaulē ievērojamākie eksperti ir novērtējuši kā visdziļāko krīzi kopš lielās depresijas laikiem *(Zadorožnaja, 2010)*.

"Spēcīga pasaules ekonomiku savstarpējā atkarība šo krīzi padara par patiesi globālu ekonomisku krīzi visās nozīmēs. Valstu līderi šobrīd cenšas tikt galā ar jaunajiem ekonomiskajiem izaicinājumiem, sagatavojot savas ekonomikas, lai tās spētu funkcionēt nākotnes ekonomiskajā ainavā, kam būs raksturīga pieaugoša nenoteiktība. Sarežģītajā globālajā ekonomiskajā vidē svarīgāk nekā jebkad agrāk būs ielikt drošus pamatus, kas balstīs ekonomisko izaugsmi un attīstību," atzīmē Pasaules Ekonomikas foruma dibinātājs un izpilddirektors Klauss Švābs*(Zadorožnaja, 2010)*.

Baltijas valstis laika periodā no 2009. līdz 2017. gadam ir panākušas konkurētspējas indeksa pieaugumu, tomēr izmaiņu dinamika ir atšķirīga. Ja Igauniju var raksturot kā neapstrīdamu (GCI) līderi Baltijas valstu starpā, kurai šajā laikā indekss ir pakāpeniski pieaudzis, tad Lietuvā var vērot stagnācijas periodu (2011. – 2014.), bet Latvijas indekss ir gan samazinājies (2014. – 2016.), gan stagnējis(2015. – 2017.). Ja2014. – 2015. gadāLietuvas (4,51) un Latvijas (4,50) attīstības indeksi ir līdzīgi, tad tos veidojošo faktoru grupu vērtējums uzrāda nozīmīgu diferenciāciju. Ja Latvijai nedaudz augstāks vērtējums ir faktoru grupās

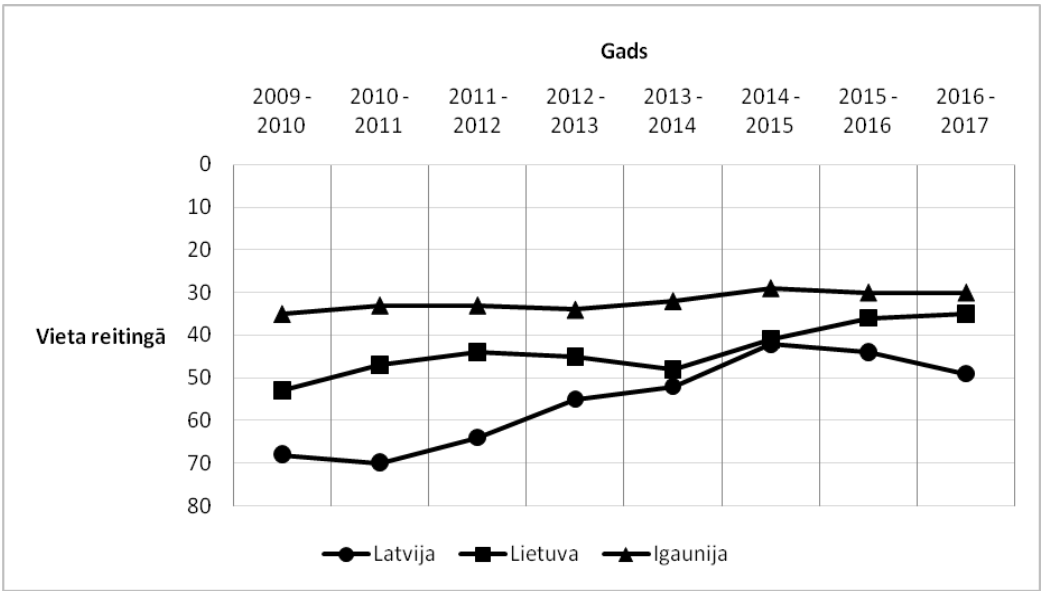
"pamata prasības" un "efektivitātes pastiprinātāji" (5,14 un 4,60 pret 5,08 un 4,54), tad Lietuva ievērojami apsteidz Latviju "Inovācijas faktoru" grupā (3,97 pret 3,68).



2.attēls. Baltijas valstu konkurētspējas indekss 2009. – 2017.gadā
(The Global Competitiveness Report)

Analizējot valstu atrašanās vietu kopējā konkurētspējas reitingā (3. attēls), vērojama mazliet atšķirīga izmaiņu dinamika. Konkurētspējas indeksa pieaugums nenozīmē valsts konkurētspējas uzlabošanos kopējā reitingā. Piemēram, (GCI) pastāvīgs pieaugums Igaunijai atsevišķos periodos nozīmējis vai nu nemainīgu vietas saglabāšanu, vai pat atkāpšanos kopējā valstu reitingā (2010. – 2013., 2014 – 2017.). Lietuvas (GCI) stagnācijas periods (2011. – 2014.), tai nozīmējis dažu vietu zaudējumu kopējā valstu konkurētspējas reitingā. Latvijas pozīciju dinamika reitingā atšķiras no kaimiņvalstīm. Neskatoties uz (GCI) pieaugumu tā vienīgā (2009. – 2011.) piedzīvo kritumu valstu konkurētspējas reitingā, ko galvenokārt nosaka negatīvās makroekonomiskās izmaiņas valstī.

Laikā no 2012. līdz 2015. gadam Latvija salīdzinoši strauji uzlabo pozīcijas kopējā konkurētspējas reitingā, bet šī tendence pēdējos gados ir mainījusies uz pretējo. Indeksa uzlabojumi nedrīkst mazināt uzmanību uzņēmējdarbības vides uzlabošanā un ekonomiskās stabilitātes nodrošināšanā, jo rādītāji, kuri nav uzlabojušies vai pēdējosperiodos pat pasliktinājušies, norāda uz ļoti nopietniem problēmjautājumiem, kuru risināšana ir vitāli svarīga valsts ekonomikas ilgtspējai.



3.attēls. Baltijas valstu vieta kopējā konkurētspējas reitingā 2009. – 2017.gadā
(*The Global Competitiveness Report)*

Secinājumi un priekšlikumi

Pasaules ekonomikas foruma, 2004. gadā ieviestais (GCI), ir viens no plašāk zināmajiem pasaules valstu konkurētspējas novērtējuma modeļiem. Tam pastāv trūkumi, kas saistīti ar datu iegūšanas metodoloģiju, būtiskākais no kuriem ir saistāms ar subjektīvas informācijas dominējošu īpatsvaru, jo 2/3 (GCI)aprēķināšanā izmantotās informācijas ir uzņēmēju aptaujas dati.Tomēr (GCI) sniedz informāciju par ekonomiskās vides izmaiņām, bet šī informācija ir atrodama nevis kopējā indeksa pārmaiņās, bet gan atsevišķās to veidojošās kategorijās.

Neskatoties uz metodoloģiskajiem trūkumiem, (GCI) apliecina Igaunijas kā ekonomiskā līdera statusu Baltijas valstu vidū. Pēdējo gadu nepatīkamākā tendence ir Latvijas tautsaimniecības konkurētspējas kritums Baltijas valstu vidū, kas var atstāt negatīvu ietekmi arī turpmākajos periodos.

Latvijas pozīciju konkurētspējas reitingā pierāda, ka tautsaimniecības konkurētspējas palielināšana ir nosakāma par valdības prioritāti un to būtu jāievēro valsts pārvaldei kopumā.Latvijai nav institūciju, kas risina konkurētspējas problēmas, ar kuru palīdzību valdība var novērtēt savas ekonomikas priekšrocības un trūkumus.Veidojot ekonomisko politiku jāpievērš uzmanību atsevišķu (GCI) indikatoru izmaiņu dinamikai, līdz ar tošis darbs nav tikai kāda viena administratīvā resora uzdevums.

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INTEGRATION OF UKRAINE INTO EUROPEAN UNION IN GLOBOLIZING WORLD

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Abstract. The article investigates the problems of Ukraine's integration under globalization conditions, namely, the reasons for negative tendencies in the economic development of the country and its international competitiveness. The authors suggest some steps to introduce European norms, values and living standards in our country.
Keywords: integration, globalization, information space, economic recession.

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Introduction

Ukraine's unstable economic conditions caused by a number of external and internal factors both structural and tactic in character call for constant transformations. In a rapidly globalizing world when the Ukrainian economy is undergoing changes, an organization functioning requires prudent strategic steps aimed not only at short-term surviving but also at creating a high potential in the long run.

Problems and prospects of European integration of Ukraine

Globalization issues indicate that it has a number of advantages. It facilitates the economic activity between countries providing an access to advances in economy and science and leveling the development inequity of different regions. At the same time, for many countries including Ukraine, globalization causes some difficulties and risks by decreasing the country's economic potential due to economy transition towards a free-market system, disintegration of post-Soviet states as well as low efficiency of national economic, executive and legal systems. It is the uneven balance of power that makes one accept the rules of more powerful market entities exchange (Volkov , 2004).

Modern globalization having reached a high level of interdependence indicates a process of transforming regional social and economic systems into a single worldwide system evolving on the basis of unified regularities. Fernand Braudel defines globalization as a transformation of individual economies into the world economy (Braudel, 1997).

On the one hand, globalization facilitates a rapid development of the productive forces, science and technology and intensifies nations' intercourse. Thus, it indeed facilitates the creation of a universal resource base and intellectual potential of mankind to ensure economic development according to new high standards. The growing interdependence of nations in all

spheres causes new political approaches aimed at maintaining democratic multilateral mechanisms of controlling the world system.

At the same time, globalization processes developing mainly spontaneously without any collective control of the world community, escalate a number of existing economic problems and give rise to some new risks and challenges. According to V.L. Inozemtzev, modern globalization is a transformation of regional social and economic systems that have reached a high degree of interdependence and integrated into a single world system developing under relatively unified regularities (Inozemtzev, 2003).

O.M. Chumakov in his article "Globalization and cosmopolitism in modern age" focuses attention on another aspect of "globalism". He indicates that globalism is a phenomenon characterizing the world's integrity as well as a worldview, a type of consciousness, a world perspective when a global component dominates домінуючою (Chumakov, 2005).

At present, the development of all countries and world economy sectors is determined by globalization and increased economic interdependence of the states. Radically new information technologies and communication means, fast-track deregulation of the goods, services and financial markets have accelerated economic processes and decreased the degree of freedom in business. As far as Ukraine's strategic goal is European integration, we should take into account these tendencies.

The primary reason that blocks Ukraine's joining the world economy is an extremely low competitiveness of its goods on the world market, as the majority of Ukrainian goods do not meet the international standards. Nowadays, the transition to the world-class standards requires much time and money, which most producers cannot afford. Besides, Ukrainian products are characterized by a low quality and materials-output ratio as the equipment applied is obsolete. The reasons for low competitiveness of Ukrainian goods include the predominance of primary commodities in the country's export, the lack of high technology equipment, patents, licenses, know-how that are in great demand on the market. A considerable drawback is the lack of highly qualified employees ready to work on foreign markets and guarantee sales activity.

The research by the World Economic Forum indicates that in 2015-2016 Ukraine took the 79th place among 140 countries as for global competitiveness having lost three positions since the previous year (76th place) (Public union "Economic discussion club").

Experts say that the most challenging issues of Ukrainian business activity include the following (in the descending order): corruption, a complicated access to finances, inflation, political instability, high tax rates, inefficient bureaucracy, complex tax laws, currency market control, frequent government changes, limited labour market control, low innovation potential, low-quality of infrastructure, a high crime and theft rate, poor health care and education as well as bad professional honour (Public union "Economic discussion club").

Summarizing experts' estimations as to negative features in Ukraine's economic development and its international competitiveness we can provide the following reasons:

1) deterioration in the financial market development because of the unstable bank system;

2) the country's credit rating drop caused by the state debt escalation;

3) low national investors' protection caused by the inefficacious investment protection by the state;

4) the need for professional management;

5) a growing number of emigrant-researchers resulting in Ukraine's intellectual potential decrease;

6) decreased impact of business on the conditions of direct foreign investment;

7) increased impact of taxation on investment stimulation;

8) poor intellectual rights protection;

9) business development position drop (now 98th, in 2015 -91st) caused by inefficient antimonopoly laws and the lack of stimulation mechanisms for small and medium-sized business including the tax inspection pressure;

10) low quality of Ukraine's infrastructure.

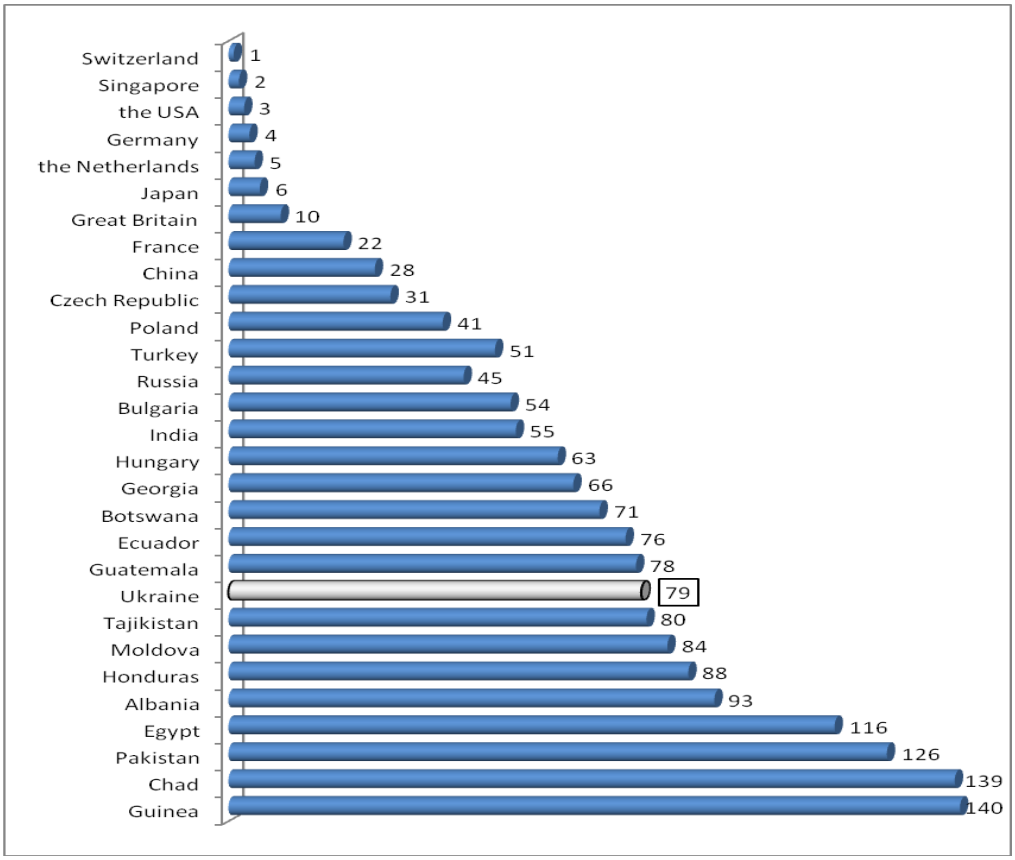

Fig. 1. Global competitiveness indices in 2015-2016*

*Source: The Global Competitiveness Report 2015-2016

At the same time, Ukraine's higher education has been improved resulting in a growing number of graduates, the market size and innovations due to a high level of innovational potential, scientific and research staff as well as the quality of research institutions.

The Global Competitiveness Index indicates a country's competitive advantages. It is a traffic map for potential foreign investors and governments. The international competitiveness regress is determined by the lack of complex and sectorial strategies for the country's long-term development. The long-term strategy development taking into account the strong and

weak positions in accordance with the Global Competitiveness Index makes it possible to form the tactic and strategic goals for Ukraine, facilitating its investment attractiveness and the country's brand formation.

That is why, Ukraine's economic model should take some modern world achievements as an example including rapidly changing technologies, technical, environmental and other criteria of competitiveness. The basic factors of increasing Ukraine's economic competitiveness as a whole and that of its separate enterprises on the world markets are a favourable business environment, investment climate, transparent and non-overburdening taxation as well as comparatively cheap labour force.

Ukraine's economic system formation is mostly connected with its transition from the administrative and command economy to the market one. Meanwhile, some people think that we observe the transformation of the mixed-type economy based on directive and planned principles to the mixed-type economy based on the free-market principles. In other words, the principles change. These transformations are not so much characterized by the reforms in the economic policy and business methods as by the changes in the social and economic relations.

The major goals of the Ukrainian economy market transformation include:

- creating a reliable foundation for people's welfare growth;
- stimulating a rapid economic growth;
- labour productivity increase;
- reaching the world efficiency levels of mineral commodity usage introducing new technologies**;**
- manufacturing a sufficient amount of products in demand;
- ensuring a high quality of products and services;
- creating conditions for increasing the real income of the population.

While analyzing Ukraine's economy position and perspectives, it should be noted that over the years of its independence the country failed to create an efficient economic system. The country's sovereignty has been expressed by formal political attributes as the state debt is covered from foreign sources. The shadow economy and its criminalization pose a serious threat for the country's safety.

In the course of the economy transformation there appears a need for creating conditions of its further development to ensure the economic system functioning and to facilitate its global competitiveness.

It should be noted that in the strict sense, a transformation is a transition period (transition economy, transformation economy) restricted in time and determined by crucial events in society implying a transition from one balanced state to another. Yet, in a general sense, it is a continuous process unrestricted in time implying a system transformation (systematic changes), including its elements, connections and relations among them (Fathurdinov, 2003).

Economic theoreticians focus their attention on a transition period in economy.

Theoretical economics as a mode of thinking is a relatively young branch of science. It was first distinguished in the general philosophy structure in Adam Smith's "An inquiry into the nature and causes of the wealth of nations" that can be considered the first research of economic development ever. The author investigated the issues of continuous production and income growth in society.

Later on, the Industrial Revolution made economists focus on regularities in capital economy dynamics, fluctuations of economic variables and that of the economic development in particular.

Economic development in its traditional rendering is determined by labour distribution and specialization. Under capitalism conditions, this notion rendering changed. Joseph Schumpeter proved the hypothesis that economic development is a series of disharmonic leaps and jerks caused by introduction of radically new investment projects (innovations). Development involves relatively short alternating periods of welfare and recession because of the disturbance in the resource and income circulation conventional for the system (Mamedova, 2010).

The major economic problems of underdeveloped countries were connected with the growth and structural changes without which economic development could not occur as well as with the countries' position in the world economy. Crisis aggravation in developing economic systems was also explained by cyclic fluctuations in the economy, which provide for alternating stage changes from recession to expansion.

M.D. Kondratiev indicated that for two decades prior the long cycle wave of expansion one could observe a recovery of technological inventions and the expansion beginning coincided with a wide introduction of inventions in industry. That idea supported Schumpeter's innovation theory in which he saw the chance to overcome recessions in production by means of innovation upgrading of capital through technical, organizational, economic and management innovations.

On the other hand, the development of economic systems in W. Rostow's theory of the stages of economic growth includes five linear stages:

1) traditional society, technologically backward with predominant agricultural relations and hierarchical social structure;

2) preconditions for take-off, characterized by new technologies in agriculture due to new investors;

3) take-off to the cumulative growth characterized by a self-determined growth and formation of the social and political structure supporting innovations;

4) drive to maturity, a long period of technological progress;

5) high mass consumption, the longest period when prosperous society is formed and consumers' goods production becomes complicated.

Transition to the growth stage is possible if internal and external investment resources are mobilized. The Harrod-Domar model describes the impact of investments on economic growth suggesting that part of the national income should be saved and mobilized in the form of investments to facilitate further economic development.

Among the reasons for the economic recession in Ukraine, one can mention the absence or underdevelopment of many necessary institutions mediating the relations between the market, the state and the community. The major causes of Ukraine's economic system transformation problems include:

1. The previous economic system was based on distributive relations; everything produced by people was taken by the government and then part of it was distributed by certain officials among the legal and physical subjects of the national economic complex.

2. A relatively low development level of productive forces compared to other developed countries, a high production concentration making the conditions for developing small and medium-scaled business complicated; the economy disequilibrium, its monopolization, the continued existence of the elements of the state-run economy 3. The issue of Ukraine' economic development model has not been fully approved yet. Researchers state that it can be a mixed social-oriented economy involving the advances of the modern civilization, its best economic, scientific and technical achievements. This model should be

detailed and connected with the economic policy including the development of the stages, strategies and tactics of its realization.

Mixed economic systems of a European type would be ideal for Ukraine providing that the economic mechanism is under the state's control. Ukraine belongs to Europe from the geographical viewpoint. The relations between Ukraine and the European community are vitally important as they guarantee peace and safety in the Euro-Atlantic region. Yet, if Ukraine is eager to become a European state not only geographically, but also economically, a whole complex of steps should be implemented to introduce European norms, values and standards of living.

The transition economy introduction raises a number of problems:

1. The economy transformation degree and its recession. We can render the recession accompanying transformation processes as a considerable potential of macroeconomic contradictions accumulated in the years of the state-run economy. The recession is caused by radical economic transformations, that is why it is called a transformation recession. We can say that society's expenses from the recession are a kind of charges for the system transformation, a social price of economic reforms.

2. Transition period duration. The depth and duration depend on the disproportion and amount of transformation tasks considering technological and technical levels as well as the development level of market relations, etc.

3. Coordination of wide, multidirectional interests in a region. Integrated national entities, including independent republics or states tend to become control subjects determining the process of social and economic transformations during a transition period.

4. The correlation degree of the state control and competitiveness. The state control over the economy depends on the particular economic situation. In a transition period, the state focuses its economic policy on stimulating the business and investment activity, consumer purchasing power increase by means of subsidies and other economic regulators. Besides, the state decreases taxes, credit rates providing extra jobs to ensure employment.

There are several classifications of transition periods in the world practice. According to one of them, we distinguish the following (Mamedova, 2010):

– "market socialism" characterized by gradual changes performed by the state leaders (Yugoslavia, Hungary);

– "shock therapy" involving a rapid destruction of the previous system, the market entry, market relations, (accelerated corporatization of the state property – Poland, the CIS);

– a gradual version focusing on the "process" unlike the shock therapy. Transformation is interpreted as a change in the structure of the aggregate demand and supply, highlighting a resource- and capital-intensive character of the process and its duration.

Reform practice reveals that studying other countries' experience is of great importance to ensure the economy reformation by overcoming the transition recession difficulties on the way to the free-market economy. In this aspect, the experience of forming international standards in Poland would be of a particular interest taking into account its geographical proximity, economic connections and long cooperation with Ukraine. In Poland, the international consensus-oriented standards providing acceptable economic decisions and an access to European knowledge and experience have been introduced

Science and education, teaching and learning are the most effective factors of training a person to live in the information society. Education modernization based on information technologies introduction would create a new social and cultural environment, the information society. The creation of the Single Information Space (SIS) is one of the ways to provide

information support in education. It would allow us to introduce new information and telecommunication technologies, apply unique information resources and naturally create a culture generated by the information age in which individuals' and social groups' interests are realized.

Modern training practice focuses on the issues of IT penetration in education the latter becoming an open process with a variety of widely discussed and scientifically proven alternative strategies.

The information society formation in education involves the introduction of multimedia training the advantages of which are revealed in Fig. 2 and include the following:

- individualization of training (the possibility to consider students' training levels, abilities, needs and interests);
- the change in cognitive activity character (the increased independence and search skills);
- self-perfection stimulation;
- enhanced intersubject communication in training (phenomena and events are studied in an integrated manner);
- enhanced flexibility, mobility of education;
- forms and methods of organizing students' extra-curricular activities change as well as the possibilities to spend their free time.

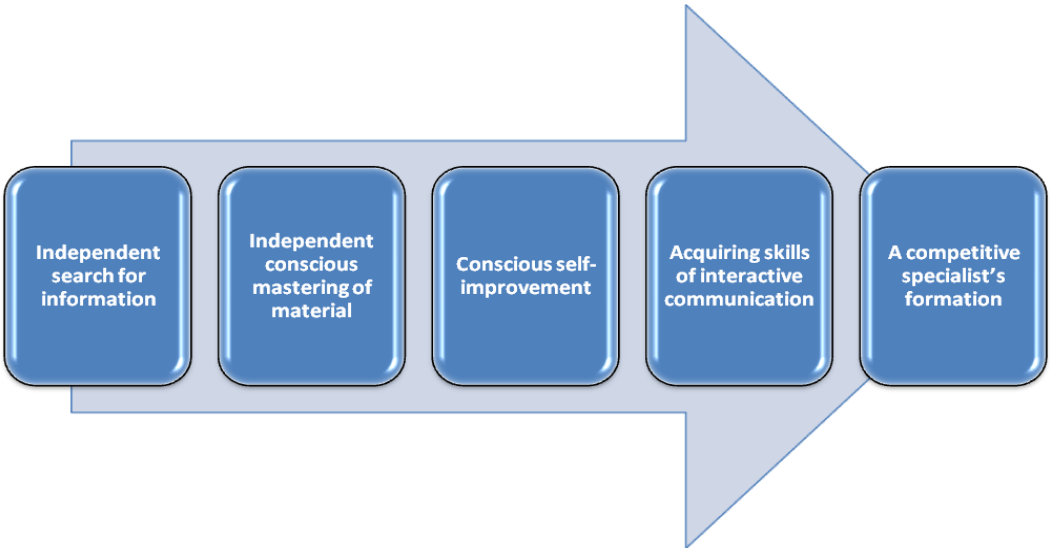

Fig. 2. IT-penetration stages in education

This complex being introduced into the Ukrainian teaching process is inferior to the similar practices in other countries. In its turn, education reconstruction is based on the fact that social, economic, cultural and technological conditions of human existence change in accordance to social development and it is a necessary response to transformations caused by globalization. The Single Information Space (SIS) provides a possibility for all system subjects to use electronic information resources of the system. The education SIS is based on the open education model (Fig.3).

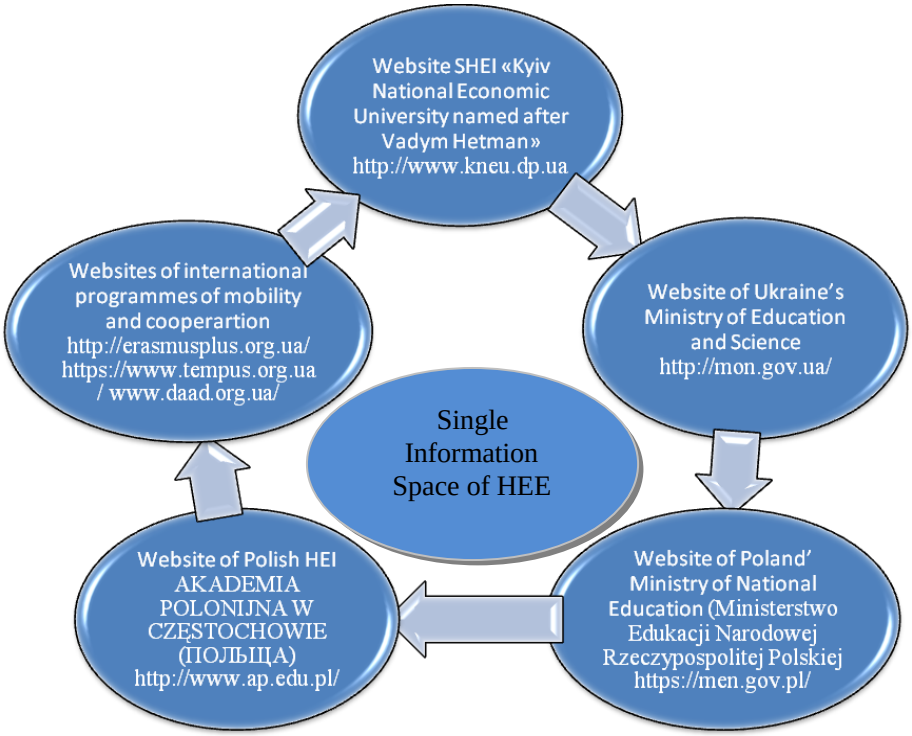

Fig. 3. Single Information Space of a higher educational institution (HEI)

Conclusions and recommendations

Thus, the economic system functioning involves the changes in its development stages determined by their cyclic character. The transition to a radically new economic level is possible in case of creating the country's task-oriented strategic potential. Ukraine's relations with the European community are of great importance as they ensure peace and stability in the Euro-Atlantic region. Yet, if Ukraine is eager to be a European state not only in a geographical sense but also in an economic one, a whole set of actions should be introduced to achieve the European norms, values and standards of living.

It is advisable to introduce the international consensus-oriented standards providing acceptable economic decisions and an access to European knowledge and experience. Science and education, teaching and learning are the most essential factors in a person's training in the information society. Education modernization based on information technologies development and introduction will allow us to create a new social and cultural environment, the information-oriented society.

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ONBOARDING NEW EMPLOYEES: REVIEW OF CURRENT PRACTICIES

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Abstract. New employees come in contact with an organization through onboarding programs. The author hasstudied strategic onboarding programs of world-known companies and recounted the most eye-catching features of them in the article such as suggesting newcomers money for not working at the company or meeting new employees with a bottle of wine. In conclusion, the author distinguishes some common features of successful onboarding programs.

Keywords: onboarding, employee, new hire, newcomer, onboarding program

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Introduction

Every year, 25% of the USA population experiences a career transition. 50% of all hourly workers in USA leave new jobs within the first four months of employment. 50% of external senior hires fail within the first 18 months. 86 % of newcomers decide within the first six months whether or not to stay at a company. In addition, this turnover can be expensive: the cost to bring on a new employee can be as high as 150% of that person's salary. New employees who go through a structured onboarding program are 58% more likely to be with the organization after three years (KPMG OnBoard).

Onboarding is the process of helping new hires adjust to social and performance aspects of their new jobs quickly and smoothly (Bayer, 2013). Experts of Aberdeen Group distinguish strategic and tactical onboarding. *Strategic onboarding* is a formalized approach to bringing new hires into the company. Such process requires support from all parties involved, from the new hires themselves, to HR, hiring managers, and coworkers. Comparatively, *tactical onboarding* consists of the more traditional activities associated with the process, such as new hire orientation or forms management (Lahey, 2016).

Effective onboarding program can improve:

- Employee retention – the percentage of hires that stay with the organization;
- Time to productivity – the percentage of new employees that meet their first performance on time;
- Manager satisfaction – the year-over-year change in hiring manager satisfaction with the employees that have come into the firm (Aberdeen Group, 2013).

For employees, long-term outcomes of good onboarding include job satisfaction and organizational commitment (Maier, 2001).

Onboarding has four distinct levels, the Four C's (Bayer, 2013; Talmundo):

- *Compliance* is the lowest level and includes teaching employees basic legal and policy-related rules and regulations.Refers to the all the paperwork and administrative tasks involved in getting new employees onboard. This can range from direct deposit or other

benefits documentation to getting an email account or login info for the various company tools they will need for their job.

- *Clarification* refers to ensuring that employees understand their new jobs and all related expectations. This means that performance and responsibilities are clear for not only the new hire, but also for his/her manager and team members.

- *Culture* is a broad category that includes providing employees with a sense of organizational norms— both formal and informal. Refers the spoken and unspoken "rules of the game" at an organization, how employees navigate and successfully achieve their work at a company.

- *Connection* refers to the vital interpersonal relationships and information networks that new employees must establish. Integration into the team and the company's mission, making new hires feel as "a part of the family".

All onboarding programs fall on one of three strategy levels: passive, high potential or proactive (Bayer, 2013; Talmundo):

- *Level 1. Passive Onboarding* is when an organization's approach to formal onboarding focuses on Compliance. There is little to no formal action taken to address Clarification, Culture and Connection. This is a very functional view of onboarding.

- *Level 2. High Potential Onboarding* is when an organization's onboarding strategy and program addresses both Compliance and role Clarification as well as touching on some Culture and Connection aspects formally.

- *Level 3. Proactive Onboarding* is when an organization formally and systematically addresses all four key aspects of onboarding.

Let us examine some examples of proactive onboarding in the following part of this work.

Onboarding practices

Massachusetts Institute of Technology (MIT)–is a private research university based in the city of Cambridge, Massachusetts. We can study MIT`s online portal as an example of organizing onboarding program.MIT represents a guide for new employees and their managers on its special websitewelcome.mit.edu – "New Employee Orientation & Onboarding". When you enter it, you can see a special inspiring massage for newcomers: "Every individual who joins this extraordinary community changes our ecosystem in a positive way, with each addition making MIT a different, richer place. The extent of your impact, of course, is entirely up to you. Our job is to give you the tools you need to make your mark within this dynamic community".

MIT's website provides tools, checklists and other resources to help to create a positive onboarding experience for new employees.

It has special section for managers, from both Central HR and the local hiring departments, responsible for conducting onboarding process of an employee. There are checklists for every stage of onboarding: "Before the employee`s start date", "First day", "First week", "First month", "First three month", "First year". Each checklist consists of the following parts: schedule and jobduties, socialization, work environment, technology access and related, training/development. To help with the onboarding effort, MIT HR`s created a variety of tools relevant to many components involved in this process. These tools are designed to cover the necessary bases for success from the first day to the first assignment and presented on the website. They provide information on buddy program, equipment & supplies,

new employee e-mail announcement, schedule for employee's first day, successful communication, successful first assignment, talking points for debrief meetings, working location tour and onboarding planning tool.

Welcome.mit.edu provides lots of information for new employees as well. "Before you start" page gives a newcomer tips about what would happen before his first day at work, for example: expect a call from your manager, discuss your computer needs etc. The next webpages are devoted to the first days, months and the first year of newcomers at the Institute. "Your first days" page contains checklists for the first day and first week on work, recommendations what to do to gain familiarity with new surroundings, and begin work projects. "Your first months" page provides checklists for the first month, three months and six months to keep the onboarding process under control. Newcomer should feel fully engaged in his (her) new role at a period of six to twelve month according to "Your first year" page. "Your MIT" is the page, presenting all the possible information about MIT community, MIT`s jargon, food courts, events, growing and learning opportunities, discounts and perks and gives links to other different MIT`s sites. And there is also page giving information on MIT`s benefits programs.

Therefore, as we can see, onboarding process is thoroughly designed at MIT. A newcomer has a full access to the necessary information, he (she) is provided with a special "buddy" – a fellow employee (other than the manager) who gives advice and guidance on the different aspects of working at MIT.Besides the information presented on a special website, a newcomer has an in-person new employee orientation session. Managers are fully provided with the necessary guidelines, checklists, tools and resources for running a successful onboarding process. Every period of onboarding is outlined on the website and there are guidelines for both managers and new employees explaining what to do and what to pay their attention to.

Zappos.com is an online shoe and clothing shop based in Las Vegas, USA. Every new hire at Zappos has to go through four-week training program, which is a combination of technical training and culture immersion. Regardless the future position at the company (sales manager or developer), every newcomer is instilled with the Zappos mission to "deliver wow through service" during the training program.The first two weeks of program are in the classroom learning about the "wow tools" Zappos provide. After two weeks in the classroom, trainees begin taking calls from customers.

One onboarding tactic that Zappos has become famous for is "The Offer." When new employees finish the training period, they are offered a payout to leave the company. Theamount has grown from $2000 to $4000 and continues to fluctuate with the economy, but it is designed to be enough that the financial pressure of being unemployed will not make someone stay at Zappos if they feel they are not a good culture fit. Employees have three weeks to try out their new role before deciding whether to stay on or take the payout and leave. Only about 1% of newcomers take on this offer (Cooper, 2016).This highlights Zappos' focus on protecting the company culture and ensuring they have the right employees who want to be there.

Even so simple thing as a reminding letter to hiring manger can improve onboarding. *Google* research shows that reminding the hiring manager to set up the first day gets new hires up to speed 25% faster (Sullivan, 2015).

This reminder email has five critical tasks, which the hiring manger should perform:

1. Have a role and responsibilities discussion.
2. Match your new hire with a peer buddy.

3. Help your new hire build a social network.
4. Set up onboarding check-ins once a month for your new hire's first six months.
5. Encourage open dialogue.

Facebook onboarding program focuses on the first 45 minutesof the employee's journey into the organization. Facebook's chief information officer Tim Campos says that if a company does not manage to arouse a level of interest among employees about the company culture and work and make them more productive in the very first 45 minutes, then something is certainly not done right (Bhattacharyya, 2016). However, there is thorough planning of activities behind the successful implementation of this 45 minutes rule. Such activities mostly focus on getting devices and systems right – from an employee's PC to their phones. All this is done much before the employee joins. Secondly, on the day of joining, they focus more on practical aspects of the job role – like how to set up a meeting or where the printer is.Another successful employee onboarding strategy of Facebook is the Bootcamp. Every engineer who joins Facebook has toparticipate in a six-week long Bootcamp at the Menlo Park headquarters. There, engineers get acquainted not only with Facebook's codebase, but they also get a glimpse into the culture of the company. As a tool of engagement, engineers are given to write codes to provide solutions to problems on their very first day. This gives them real, hands on experience. It also serves as a source of tremendous motivation and gives a sense of instant gratification. Bootcamp also ensures that the employees get a hang of all the opportunities that Facebook can potentially offer to its employees. This serves as a source of inspiration and motivation for the new recruits.Facebook also practices freedom of choice during its employee onboarding process. Instead of assigning each employee to a team, Facebook allows employees to choose their own teams and projects, which they feel most passionate about at the end of the six-week Boot camp. Facebook's employee onboarding.

*Twitter*also has some interesting onboarding practices. Once prospective candidates accept an offer at Twitter, a number of departments (recruiting, HR, facilities, and IT) begin a 75-step "Yes to Desk" process (Sapling). The goal of it is to make sure that desks are set up, email addresses are squared away, and documents explaining job expectations are available the moment employees arriving to the office on their first work day. They also makes sure company swag and a bottle of wine are prominently displayed on each new hire's desk to make newcomers feel welcome and part of the team. New employee desks are strategically located next to key teammates they will be working with.On the first day, new team members have breakfast with the CEO followed by a tour of the company office, before group training on the tools and systems relevant to their role. To keep the company culture vibrant, Twitter has a monthly new hire Happy Hour with the Senior Leadership Team, and a rotating schedule of presentations on Friday afternoons where employees can learn about other team projects.

Pinterest has its offices in San Francisco, New York, Chicago, Atlanta, Los Angeles, London, Paris, Berlin, Tokyo and Sao Paulo.Nevertheless, all new employees go through an onboardingprocess at Pinterest's HQ in San Francisco.Before new hires arrive, they receive an introductory email with their schedule and other details, and are given the opportunity to introduce themselves to the company.Everyone in the new hire class meets on day one for breakfast followed by some brief icebreakers.This gives new hires the opportunity to start absorbing the Pinterest value of "knitting"– a term used to mean collaborating with people and seeing the world from different points of view.This continues during the week with talks from the company's leadership, onboarding workflows like IT setup, laptop and a bunch of

essential tools (i.e. slack), and opportunities to get out into the neighborhood to volunteer (Sapling.).

Quora`s onboarding program concentrates on mentorship by allocating a personal mentor to each new hire.Understanding the benefit of prioritizing new hires, Quora respects that mentors lose around 25% of personal output during the first weeks of training. New hires are pushed towards making meaningful contributions and tackling a manageable project by the end of the first week. First day activities are simplified. The focus is on tasks that communicate Quora startup culture and values. About ten onboarding talks are organized over the first few weeks. Quora also provide new hires with detailed documents on the key concepts and tools they need (Sapling).

KPMG – a consulting company, designed an employee onboarding solution called KPMG OnBoard and offers it for sale (KPMG OnBoard). KPMG OnBoard gives the flexibility to build the features one's business needs, enabling to engage, connect and empower new hires from the beginning. It reflects the way people interact digitally, helping to build relationships with new hires, from the day they get an offer through to their first three months on the job. KPMG OnBoard connects everyone involved in the process – from HR professionals and hiring managers to the new hires themselves – encouraging communication and enabling early productivity.KPMG OnBoard provides the platform to automate a manual process, decreasing time to productivity and alleviating the pain of traditional onboarding. KPMG simplified the process of onboarding into a flexible, user-friendly and highly interactive experience, focusing on the employee as the top priority.

Conclusions and suggestions

Therefore, having studied the best onboarding practices of word-known companies and organizations, we can highlight their important features:

- Investment – companies invest their time and money in developing strategic onboarding programs. Successful onboarding pays for itself.
- Early beginning – successful onboarding should start before the first working day of a newcomer. According to Aberdeen Group 83 % of the highest-performing organizations began onboarding before the new hire's first day (Aberdeen, 2013).
- Memorable first day – lunch with the CEO or presenting a bottle of wine – make a new comers feel themselves welcomed. Nearly4 % of employees leave a new job after a disastrous first day (Bauer, 2015).
- Structured schedule for first days – new hire should know exactly what to do and not wonder what is next. Employees in a well-structured onboarding program are69 % more likely to remain at the company after three years (Bauer, 2013)
- Buddy – assigning newcomer with a buddy or mentor makes it easier to gain familiarity with the company`s everyday life. 56 % of new hires say having a buddy or mentor is important to them when starting a new job. (BambooHR, 2014)
- Corporate culture – communicate values, mission and corporate culture as a whole for new recruits.

Well-planned onboarding relieve potential anxieties of newcomers and give them tools they need to enter the company feeling confident, inspired and fully prepared to meet the first milestones.

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MODELING OF THE PROCESS OF UPDATING TECHNICAL AND TECHNOLOGICAL BASIS OF INDUSTRIAL ENTERPRISES

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Abstract. The work is dedicated to the issue of evaluation of economic efficiency and grounding of feasibility of technical and technological renovation of enterprises. The models to determine the time limit of updating technical and technological basis of industrial enterprises have been presented. The method of selecting the best technology to manufacture industrial products based on resource conservation has also been suggested.

Keywords: updating, technical and technological basis, industrial enterprise, the relevant period, resource conservation.

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Introduction

One of the main reasons for the low pace of the economic growth of Ukrainian economy is insufficient level of technical and technological basis of domestic enterprises. At some industries of Ukraine the depreciation of fixed assets is observed, the level of which at some enterprises exceeds 70-80 percent. A substantial part of these funds is morally outdated, which reflects on the application of technologies of manufacturing industrial products, which tends to have high charges of productive resources, especially - energy and labour. Under these conditions, a considerable part of the industrial production manufactured in Ukraine is uncompetitive. Thereby, there is an urgent necessity to implement a set of measures to update the technical and technological basis of industrial enterprises in Ukraine based on large-scale technical re-equipment.

Diagnosis of the level of the depreciation of fixed assets of industrial enterprises

The study of regularities of processes of the depreciation of fixed assets of industrial enterprises is examined in a large number of publications. In particular, this issue was examined from the standpoint of: the formation of theoretical and methodological foundations of innovative renewal of technical and technological base of the company - in the work of such scholars as A. Amosha (2007), I. Bulyeyev (2007), V. Grishko (2011), N. Omelianchik (1997), A. Rudchenko (1997), N. Tyutyun (1997), D. Shevtsov (2007), etc.; evaluation of technical condition of fixed assets and the level of technological development - in publications

of I. Gohberg (2007), I. Skvortsova (2003), L. Fedulova (2008), S. Shcherban (2007), etc.; choosing the best strategy options and upgrade options for fixed assets, as well as study method grounding of the method of calculation of depreciation on the renovation of them - in the works of scholars such as G. Yershov (2007), M. Natarov (1998), A. Serhatyuk (2002) and others.

Despite of the fact that many scientists had suggested fruitful approaches to ascertain regularities processes of the depreciation of fixed assets of industrial enterprises and their restoration, at present there are still questions to the evaluation of the level of the depreciation of facilities at their market value, determination of the best time for their renovation and grounding of the choice of the best technologies of production.

In particular, diagnosing the problem of the depreciation of fixed assets is an important thing. It should be pointed out that there is a certain level of depreciation of fixed assets, which can be considered as threat to the future of the enterprise. However, the precise formulation of the concept of "threatening levels of wear and tear of fixed assets" requires a consideration of certain limitations and assumptions relating to the three main items, namely:

1. Opportunities of the enterprise in the future to ensure the volume of the results of its operating at a level, at least not below the existing one.

2. Opportunities of the enterprise to operate an unlimited period of time.

3. Opportunities of the enterprise to provide the reproduction of their main means to achieve the first two requirements exclusively from their own sources of funds, without using additional funds received in the form of loans or contributions to increase the share capital of the company.

In case the current level of the depreciation of fixed assets is not so big and that existing internal capabilities of the enterprise concerning the implementation of the simple reproduction of its main funds not to provide the realization of the three main requirements that were mentioned above, the level of depreciation will be not threatening, though over a certain size it may cause some concerns to owners and managers of the company. Taking into account mentioned above it is also necessary to introduce the concept and to characterize the normal (acceptable) level of wear and tear of fixed assets of the enterprise.

Therefore, it is advisable to distinguish two main types of the depreciation of fixed assets by its level namely:

- Normal (acceptable), when the company can provide simple reproduction of fixed assets using only the future flow of depreciation on the renovation of them;

- threatening, when the company can not even make a simple reproduction of their fixed assets, using its future flows of income and depreciation.

Accordingly, we can distinguish the following derivative levels of the depreciation of fixed assets of the enterprise: low, the value of which does not exceed the normal (acceptable) level of depreciation; average, the value of which exceeds normal (acceptable) level, but less threatening; high, the value of which equals or exceeds the level of threatening depreciation.

Depending on the level of depreciation of fixed assets is at the moment (low, medium or high) the actions of normalizations of the level of depreciation of fixed assets of the management of the enterprise are different. If the depreciation is low, the company may only use its amortization. If the level of depreciation is medium, in this case the enterprise to provide at least the simplest reproduction of its production capacity must also use part of its future earnings in order to implement measures to update its fixed assets, and the task is to determine this part of the profit and its change over time. If the level of the depreciation is high, then the company has two options: to intensify the process of investing its own sources

of funds to update its fixed assets (in this case the level of wear and tear over time normalized by the decommissioning of obsolete fixed assets, but just playing them could not be manage) or, in addition to its own sources of funds also involve external sources (including bank loans and additional contributions).

In order to determine the settings of threatening depreciation of fixed assets we must first calculate the level of it.There are two most common ways to calculate it:

1) determination of the level of depreciation of fixed assets at their market value (the ratio of market value of depreciation to the original market value of fixed assets of the company);

2) determination of the level of depreciation of fixed assets at the actual time of operation (the ratio of actual hours worked on the introduction of fixed assets in operation for the duration of their effective functioning).

Let's examine the first option of measuring of the depreciation of fixed assets, having examined the case of individual elements of the core business, followed by extrapolation of the results to the entire set of its assets.

We introduce the following notation:

V_0 – the initial cost of the item of fixed assets

V_i – residual value of the element of fixed assets of the enterprise that worked *i* years;

r – the discount rate (annual in fractions of a unit).

Then the company will have time to accumulate the required amount of funds for replacement of the element of fixed assets due to the net cash flow from operation (net profit and depreciation) for the time remaining until the termination of its operation, if it carries out the following condition:

$$V_i \times (1+r)^{T_e - i} \geq V_0, \quad (1)$$

where T_e – effective operating time of the element of fixed assets, that is to say, the period during which its functioning allows the owner to get positive net cash flow (the amount of profit and depreciation).

In fact, the research has proved that in case of using the income approach to the assessment of residual value of fixed assets of value equal to the discounted net cash flow, which get left on the operation of these assets over time for their effective functioning. Accordingly, the level of depreciation on these tools will not be threatening if the value of their residual value, calculated by income approach, accumulated at the end of period of their effective functioning at a rate of discount E is greater or equal to its original value. This idea is based on this condition, which is formalized in the form of inequality (1).

Since the level of depreciation of fixed assets at their market value determined by the formula

$$L_i = 1 - V_i / V_0, \quad (2)$$

where L_i – level of depreciation of the element of fixed assets that worked i years, then the threatening value of fixed assets depreciation according to formula (1) will be determined by the following mathematical expression:

$$L_{ti} = 1 - V_i / V_0 = 1 - 1/(1+r)^{T_e - i}, \quad (3)$$

where L_{ti} – lower limit values of threatening depreciation of a particular item of fixed assets.

In terms of mathematical analysis, formula (3) can be represented as follows:

$$l_{ti} = 1 - 1/e^{(T_e - i) \times r}, \tag{4}$$

where e – the base of natural logarithms.

If we indicate the number of years that are left to be worked out by this element of fixed assets T_b (that is $T_b = T_e - i$), you can also determine these dependencies, arising directly from the expression (4):

$$r = (1/T_b) \times \ln\left(1/(1 - L_{ti})\right); \tag{5}$$

$$T_b = (1/r) \times \ln\left(1/(1 - L_{ti})\right), \tag{6}$$

where ln – the mark of the natural logarithm.

The analysis of the dependences leads to the conclusion that in general there is not any constant value of the lower limit of the threatening level of depreciation of fixed assets of the company, that even at a very high level of its depreciation, for example 90 percent under certain conditions this level of depreciation is not threatening (for that $T_b$and r should be big enough).

Now we will spread the results on the calculation of threatening depreciation of the separate component in case the totality of the fixed assets of the company. For this purpose, we insert the following notations:

$V_0(j)$ – original value of fixed assets of the enterprise, that still have to work j years before the end of functioning;

V_s – aggregate residual value of all fixed assets of the company.

Then the depreciation of fixed assets will not be threatening if that condition is fulfilled:

$$V_s \geq \sum \frac{V_0(j)}{(1+r)^j}. \tag{7}$$

If to mark w_j as the share of fixed assets, that still have to work j years in the total value of the initial value of fixed assets of the company, the formula (7) can be represented as follows:

$$V_s > V_{0s} \times \sum \frac{w_j}{(1+r)^j}, \tag{8}$$

where V_{0s} – total original value of fixed assets.

Then the level of threatening depreciation of the fixed assets of the company will answer the following inequality:

$$l_{ts} > 1 - \sum \frac{w_j}{(1+r)^j}, \tag{9}$$

where L_{ts} – the threatening level of depreciation of fixed assets.

Thus, the process of diagnosing the depreciation of fixed assets of industrial enterprises shall include these following stages: the implementation of the forecast of cash flow while efficient operating of fixed assets during the period of its operation; discounting projected net cash flow and calculating the market value of the residual value of fixed assets; determination of the current level of depreciation and calculating of the lowest threatening level; comparing the lower limit threatening level of depreciation of these assets with the actual level of depreciation and determination on the basis of comparison of the list of activities and sources of its normalization, including the development schedule of replacement of outdated means of labour through internal and (if necessary) external sources of funding for the program to update of the fixed assets of the company.

Grounding of the choice of the best production technology and optimization of the deadlines of renovation of fixed assets

Let's consider in more details the technological component of technical and technological basis of the company. For this purpose, we introduce the indicator of adaptability of fixed assets that can be estimated as follows:

$$\alpha = \frac{K_t}{K_s}, \tag{10}$$

where α – the level of adaptability of fixed assets of the enterprise that participates in the manufacturing of this product; K_t – the value of fixed assets of the company, requiring replacement in case of transferring to progressive technology of manufacturing; K_s – the total value of fixed assets of enterprises involved in the manufacturing of this product.

The higher the level of adaptability of fixed assets of the company is, the harder it is to start producing according to more advanced technology. However, the share of fixed assets that do not include a technological component (this particularly applies passive part of fixed assets) in industrial enterprises may be quite significant.

It should be mentioned that in the case of separation of fixed assets, involved in the manufacture of certain products, on at technological and non-technical components, the flows of profits from their operation could be seen to some extent in isolation from each other. Under such circumstances replace the old technology to the new products (particularly resource-saving)is required if net cash flow (the sum of income and depreciation) in the technological part of the existing fixed assets is negative and therefore profit from the operation of non-technical component of fixed assets is less than normal. Under these conditions, if a rapid entry of new technology in the industry, unit price will be equal to the exact specific costs for the new technology:

$$P_n = c_2 + k_2 \cdot E, \tag{11}$$

where P_n – the price of the product corresponding to the specific cost of its production at the new production technology; c_2 – the cost price of the product manufactured at the new technology; k_2 – specific capital-intensive of production according to the new technology; E – normal profitability of on investment in the industry.

We should specify that the formula (11) can be demonstrated in such an equivalent form:

$$P_n = c_2 + k_2 \cdot (1-\alpha) \cdot E + k_2 \cdot \alpha \cdot E, \tag{12}$$

where α – the part of specific investments k_2, corresponds with technological component of fixed assets and that the owner of the old technologies has to put on each unit, if he wants to replace the old technology to the new one.

Under the circumstances, specific value of net cash flow from operating technological component of fixed assets using old technology of production will be determined by the following formula:

$$F_n = P_n - c_1 + k_1 \cdot E_a - k_2 \cdot (1-\alpha) \cdot E, \tag{13}$$

where F_n – specific value of net cash flow from operating technological component of fixed assets using old production technology; c_1 – cost price of the product using old technology; k_1 – the ratio of the residual value of fixed assets using old technology to the production amount of natural products; E_a – the average rate of depreciation in the technological component of the fixed assets using old technology of manufacturing products, measured in fractions of a unit of the residual value of this component.

Putting (12) into the formula (13), we get:

$$\begin{aligned} F_n &= c_2 + k_2 \cdot (1-\alpha) \cdot E + k_2 \cdot \alpha \cdot E - c_1 + k_1 \cdot E_a - k_2 \cdot (1-\alpha) \cdot E = \\ &= c_2 + k_2 \cdot \alpha \cdot E - c_1 + k_1 \cdot E_a. \end{aligned} \tag{14}$$

Under these circumstances, the application of new production technology will be appropriate under the condition

$$c_2 + k_2 \cdot \alpha \cdot E - c_1 + k_1 \cdot E_a \langle 0, \tag{15}$$

or

$$\frac{c_1 - c_2 - k_1 \cdot E_a}{k_2 \cdot \alpha} \rangle E. \tag{16}$$

Judging by the expression (15) ceteris paribus, we may confirm that efficiency of new technology increases with the economic benefits of better technology compared to worse.

In other words, a company with rather high level of technological development may not be interested in urgent replacement of its technology to more advanced, while technically out-of-date enterprise may change it to become effective. Herewith, obviously technically out-of-date enterprise may even leave behind more developed in terms of technical equipment and the efficiency of resource supply companies. In order to make this happen, it is necessary to follow these steps: the market of the product must be sufficiently competitive; there should not exist barriers, which block to the diffusion of technological innovation; technical and economic settings of the new resource-saving technologies should be significantly better compared with the corresponding settings technically out-of-date enterprises, but not too much better compared with the corresponding settings of technology that are used by an enterprise which is currently the technological leader to force it to prematurely replace the new existing technology. Under such conditions in the field there should be a change of the technological leader, and when the emergence of new high technologies is frequent, such change may occur repeatedly over a relatively limited period of time. This statement can be called as the principle of periodic rotation of a technological leader in the field.

In practice, there is often the a case when there are several alternative technologies for production of certain products, with different units of cost and specific capital intensity. Then, as follows the expression (14) and (15), the criterion for selecting the best option technology,

which ensured the highest value of specific net cash flow due to the replacement of outdated manufacturing technology, will be as follows:

$$C_i = c_{2i} + k_{2i} \cdot \alpha_i \cdot E \to \min, \tag{17}$$

where c_{2i} – unit costs according to *i*- type option of new technology; k_{2i} – specific capital-intensive of production according to *i*- type option of new technology; α_i – the part of specific investments k_{2i}, which corresponds to technological component of fixed assets and that the owner of the old technologies has to put on each unit, if he wants to replace the old technology to the new one according to *i*- type option.

It should be pointed out that while applying criterion (16), we have adopted the condition of achieving zero value of the share of net cash flow from the operation of the technological component of fixed assets using old technology of production. In this regard, there is a need to explore the possibility and feasibility of early decommissioning of fixed assets in the event that net cash flow for them at the moment still keeps a positive value.

Generally speaking, if production market is competitive and a case of complete replacement of fixed assets is considered, the implementation of early decommissioning of their operation is unnecessary. Nevertheless, if there is balance on the production market the net present value of net cash flow from operating of fixed assets must be zero. So, under these conditions cease operation of fixed assets for which the present value of future cash flow is positive, is not appropriate.

If the product market is not fully competitive (which is a fairly widespread phenomenon) and (or) considered the case of partial replacement of fixed assets, then these conditions benefit from the possibility of early decommissioning of fixed assets may exist. For this amount of net present value of net cash flow for new fixed assets must be large enough.

It should be taken into consideration that when the replacement of outdated fixed assets will be in the new time in which the net cash flow from the operation of existing fixed assets will become equal zero, the discounted value of the economic effect of the change can be calculated using the formula:

$$Z = \sum_{t=1}^{T_k} \frac{F_t}{(1+r)^t} + \frac{F}{(1+r)^{T_k}}, \tag{18}$$

where Z – discounted value of economic benefits from the replacement of fixed assets if the time of the change coincides with the effective term of operation; T_k – period of time when the value of the net cash flow from the operation of these fixed assets will be equal zero; F_t – the value of net cash flow from the operation of these fixed assets in *t*- type period (year); *r* – discount rate; F – the present net value of net cash flow from the operation of new fixed assets.

We (have) suppose that the replacement of the fixed assets at the moment of time T_1 ($T_1 < T_k$). Then formula (18) will be as follows:

$$Z(T_1) = \sum_{t=1}^{T_1} \frac{F_t}{(1+r)^t} + \frac{F}{(1+r)^{T_1}}, \tag{19}$$

where $Z(T_1)$ – discounted value of economic benefits from the replacement of fixed assets if they are replaced at the time T_1.

While using methods of mathematical analysis we can establish that the relevant period of time of replacement of outdated fixed assets in which the expression (19) becomes the maximum value will be the time in which the value of net cash flow from the operation of fixed assets is equal to the product of the discount rate on the size net present value from the operation of new assets.

Conclusions and suggestions

1. There are two main types of the depreciation of fixed assets by its level, namely the normal (acceptable), when the company can provide a simple reproduction of fixed assets using only the flow of future depreciation on the renovation of them; threatening, when the company can not make even a simple reproduction of their fixed assets, using for that purpose their future flows of income and depreciation. Accordingly, the following could be the original derivative levels of the depreciation of fixed assets of the enterprise: low, medium and high.

2. Methods for of evaluating of the economic efficiency of investments in the implementation at the industrial enterprises of new types of equipment and technology, particularly energy efficient, should include (isolation) selection of the technological component of fixed assets. Methods for evaluating the economical effect of the implementation of new types of equipment and technology that were suggested in this work and the analytical expression of feasibility of replacing existing technology manufacturing output in by the new technology of production can be applied by economists of industrial enterprises while preparing programs and plans to update their technical and technological basis.

3. In the process of planning events of the renovation of technical and technological basis of industrial enterprises, experts using the suggested guidelines will be able to establish the relevant period of time of replacement of the old technology of manufacturing products to the new one, which can maximize the efficiency of economic activities of these enterprises.

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THE EXAMPLE OF THE DESIGN OF MATERIALS

NEW ECONOMIC SYSTEM OF SOCIETY DEVELOPMENT

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Abstract. The article deals with the information economy as a new economic system wherein information and knowledge are the main products. It is proved that a central component of an economic system is work with information and use of information systems in the process of management. The author substantiates the requirement for the search of new approaches to the solution of problems of development of institutional structures of information economy.

Keyword: knowledge, information, system, information economy, management.

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Introduction

Global growth of information and telecommunication technologies, on the one hand, and also the necessity of development of scientific knowledge in the area of theory, methodology and practice of informative approach of study of information economy and society, on the other hand, determines topicality of consideration of the process of formationof information economy. Information turns into a strategic resource and factor of acceleration of scientific, technical and technological development and becomes a part of the real economy.

Subtitle of the body

It presupposes the conceptual comprehension of the process of establishment of an informative and technological method of production and related to it forming of an information paradigm in a modern economic science.

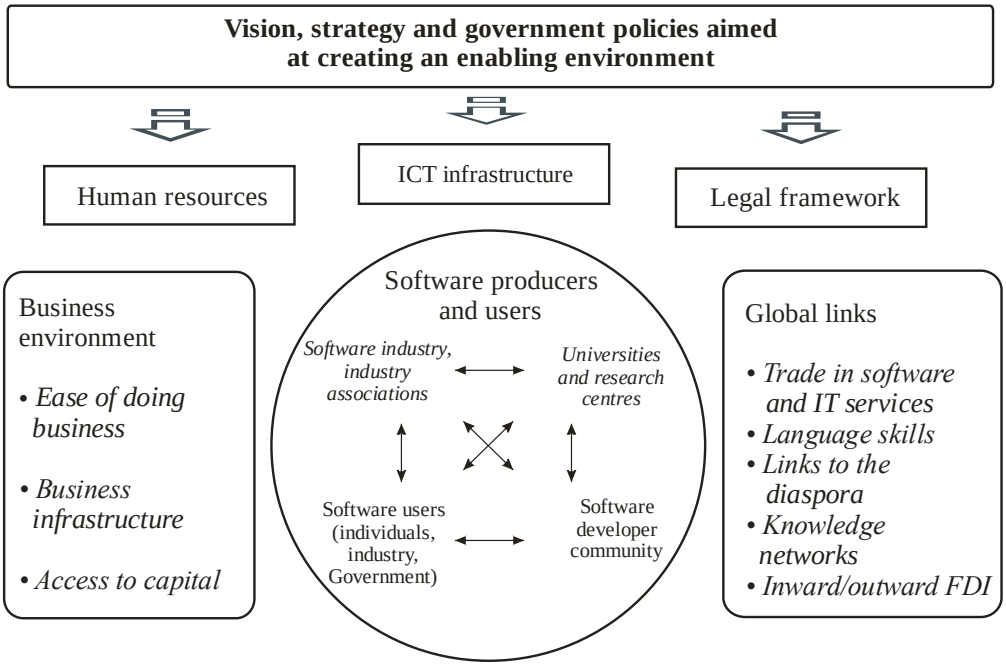
The evolutionary process of the establishment of information society is represented in researches of P. Drucker, who used a notion "information revolutions" (Drucker, 1989). He worked out the theory of the stages of development, which allows deeper understanding of the logic of establishment of information economy.

The term "information economy" was first used in 1976 in works of Mark Porat, an employee of the Stanford Centre and designated by him as a cluster of industries, engaged in the production of modern databases and facilities which provide their application and functioning (Porat, 1978). He is given the credit for introducing a distinction between the primary and secondary information sector of economy. A primary sector, according to his opinion, can be estimated quantitatively, while everything is much more difficult with the secondary one.

The Revolution in the development of information technologies allowed to talk about a global network, which materialized the globalization of economy. New information technologies, in fact, are not simply becoming the instruments of application, but also the processes of development. The system-oriented analysis of the information economy with due

regard to the forming informative paradigm of the economic theory requires additional consideration.

Figure. 1. A national software system (Information Economy Report, 2012)



Conclusions and suggestions

Conception of information economy includes fundamental definition of information society. It's defined as a system of connections and relations between individuals, which appear in the process of interchange of information concerning social and economic activity. Information economy is simultaneously defined as a system of public relations, wherein the information is a basic productive resource.

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Drucker, P. F. (1989). The new realities: In government and politics, in economics and business, in society and world view. New York: Harper & Row.
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