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of Modern Ukrainian Scientists***

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# *GLOBAL ACADEMICS*

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*Published articles are designed to draw the attention of the global academic community to the issues raised in published articles in order to develop the discussion of scientists in designated areas and set the academic vector for publications in subsequent issues of the journal.*

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## **INTELLECTUAL LEADER AND HIS ROLE IN THE MODERN MANAGEMENT SYSTEM**

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### **Abstract**

This paper aims to research the new type of the leadership, known as intellectual or transformational one. Thus, intellectualization process as the core one for creation and development intellectual leaders is viewed. In the paper authors examine different types and directions of the intellectualization process (in community, economy and labour activity).

Knowledge systems, informational systems and intellectual technologies as result of intellectualization process are also considered in the paper. Special attention is paid to the problem of intellectual management as the novel management theory, based on integration knowledge and character management.

Problem of intellectual leader development in the context of innovation and knowledge economies is researched. The main features of the intellectual leader, including intellectual curiosity, goal orientation and taking a risk, are viewed. The activities, ensuring model of intellectual management implementation on the national and regional levels are proposed.

Taking the results and findings of the paper, it is necessary to say that intellectualization in Ukraine is slowly ongoing process, which is characterized by problematic involvement of the knowledge, intellectual and informational systems and technologies into industrial, managerial,

administrative and other business-processes. Thus, it needs the complex systematic measures for its improvement and acceleration, which are proposed in the article.

**Key words:** post-industrial economy, intellectual leader, transformational leadership, intellectual management.

## 1. Introduction

Modern world economy evolves; it is defined as the post-industrial one, which is characterized by the shift away from producing [goods](#) and toward producing [services](#). The main directions of post-industrial economy are (1) innovation economics, and (2) knowledge economy, which are both characterized by increased role of innovations and knowledge.

Gary Hamel has noticed, that today “we've reached the end of incrementalism. Only those companies that are capable of creating industry revolutions will prosper in the new economy” (Hamel, 2000). Change unfolds so fast today and whips companies so furiously that business survival depends on “nonlinear” responses (“nonlinear” means anything different that makes a big impact) (Hamel, 2000). Companies will compete not in products and services but in the ability to devise ideas for innovative businesses.

Thus, we see the increasing role of the innovative ideas, which must be produced by the company's innovative and intellectual leaders.

The innovative processes also needs and are accompanied by implementation of the innovative, informational and intellectual technologies. All these emphasize an abnormally high value of the intellectualization in community, economy and entrepreneurship.

At the modern stage of the societies' development intellectualization has extended all the spheres of the human activities. The problem of the intellectual technologies' use is rather new for Ukrainian management science, because our country has not still achieved such level of the innovation development and implementation into all activities of the enterprise, as highly developed countries, for example USA, Japan, Germany, and even as developing countries, as India and China. Today this problem is researched by such domestic scientists as A. Antokhov (Antokhov, 2016), O. Melnyk (Melnyk, 2007), A. Kuzmin (Kuzmin, 2014), A. Turylo (Turylo,

2012), N. Hryhorak (Hryhorak, 2017). But nevertheless, these scientists explore this issue in the general (as the problem of the intellectualization of economic or entrepreneurial activity) or from the perspective of the specific economic branch (e.g., implementation into the productive sphere of agriculture, logistics, so on). Yes, the implementation of some intellectual technologies in the management system of Ukrainian enterprises is conducted, but often it has spontaneous character and is based on own will of the enterprise's holder.

And if the issue of the intellectual technologies and intellectualization is researched in the domestic management science, the problem of the intellectual leaders is not investigated at all. Yes, the foreign scientists and business thinkers analyze this problem in their researches, e.g. B. M Bass (1985), J. Burns (Burns, 1978), P. F. Drucker (Drucker, 2001), G. Hamel (Hamel, 2000).

The main goal of this article is to analyze the nature and the role of the intellectual leaders in the modern management system.

## **2. Intellectualization in the modern management**

Intellectualization is the complex process, which mainly has the following directions:

- 1) intellectualization of the human personal characteristics, that consists in continuous education, development, building new skills and abilities; mental development and formation of critical thinking and so on;
- 2) general intellectualization, that means informational and computer equipping, provision of the newest intellectual technologies to the production, enterprise and national economy, generally;
- 3) development of the intellectual and informational space on the basis of the Internet technologies and mobile services of the new generation, their constant development and improvement, that results in the changes of the forms of the economic and financial activity, enterprises' types, character of their interaction in the external and internal environment and so on;
- 4) general robotization and creation of the artificial intelligence and its implementation into the productive and organizational activity of the enterprise.

From the point of view of economy, intellectualization at the macro level covers intellectual

markets, markets of innovations, capital, technologies, and knowledge, so on, that results formation of the economy of the new type – postindustrial one. At the micro level, we mean by the intellectualization process intellectual, human and innovation capitals, intellectual and informational technologies as the main factors of the enterprise's competitiveness at the market.

If we view the intellectualization from the position of entrepreneurship, then the intellectual product is the main economic product (e.g., know-how, technology, patent and so on) and hi-tech product, in which the share of expenditures on R&D is about 3,5 % (Akhtiamov *et al.*, p. 17].

Another authors, A. A. Antokhonov (Antokhov, p. 31-32) and O. L. Melnyk (Melnik) for example, allocate the following directions of the intellectualization in the context of the economic theory:

- 1) intellectualization of the community, that means enhancing the role of the results of the use of the individual's intellectual abilities for the societies' development, improvement of the living conditions and the further progress stimulation;
- 2) intellectualization of the economy, that means enhancing the role of the results of the use of the individual's intellectual abilities for the economic development, optimization of expending resources relatively the received income;
- 3) intellectualization of the labour activity, which characterizes the socio-economic trend and leads to changing conditions, features, labour tools, means and its subject. The expansion of the innovative intellectual thinking takes place due to the step-by-step production satiety with the knowledge-intensive technologies and innovations.

So, we can give the following definition of the intellectualization. It is the intellectual tool of the economic development, based on the knowledge and ensures the competitiveness of the economic entities through the growth of the organizational intellect and use of the different types of the capital. Intellectualization at the enterprise characterizes the abilities of its leader, the quality of the intellectual activity of the enterprise's personnel, the availability of the intellectual capital, the ability to receive intellectual rent and so on.

The main elements of the intellectualization are:

- information and informational technologies;
- scientific knowledge;



- professional, scientific and cultural potential of the person and community;
- innovation capital and technologies;
- intellectual capital and technologies.

Factors, influencing the intellectualization process, are the following:

- 1) labour sphere, i.e. the environment of the use of the population's social and labour potential;
- 2) scientific and educational sphere, i.e. the field of the education and continuous development of the social and labour potential of the population;
- 3) management sphere, i.e. the hierarchy of the authorities' structure with all its influence factors at the processes of the societies' development and the ability to realize its intellectual potential;
- 4) socio-cultural sphere, i.e. the field of the development of the elements of the social infrastructure, that meet the requirements of the qualitative characteristics of the population's life and let to create the comfortable conditions for the human intellectual abilities realization;
- 5) informational and communicational sphere, i.e. a network of the virtual relationships among the economic entities, allowing to share information and knowledge, to develop intellectual abilities and the skill to use them (Antokhov, p. 30).

Thus, we see that the system of the factors of influence is very complicated and many spheres have an impact on the intellectualization process course.

So, what must be done at the state, regional levels and the level of the company to ensure the intellectualization process? In our view, the following efforts must be undertaken:

1. At the state level the conditions for the realization of the human intellectual abilities must be created through the development of the knowledge inclusive types of economic activity, engagement of the creative, talented youth, creation of the innovative workplaces;
2. Ensuring of the transformation of the intellectual potential to the capital through the market gears and maximum involvement of the inner resources;
3. Creation of the demand for the specialists and employees with the appropriate intellectual abilities;

4. Promotion of the competition in the employment sphere by means of the support of the management intellectualization through the financial resources use;
5. Implementation of the concept of the social responsible business;
6. Support of the creation of the digital economic space with the new virtual forms of business, which requires specialists with the high intellectual abilities;
7. Implementation of the intellectual technologies in the different spheres of activity.

The measures provided above must be ensured by the market mechanism of reallocation of the human resources and human capital among those types of the economic activity, that provide sustenance of this type of economic branch. So, these measures will provide the creation of the new workplaces, new economic branches and market segments at the state level. It means that intellectualization process displays the highest level of resultiveness under the condition of the social utility of the results of the intellectual activity.

Intellectual technology is the main result of the intellectualization process.

In general terms, intellectual technologies are defined as the systems, in which data are being generated, analyzed, interpreted and used. They relate to the analysis of data and the development of solutions directly in the system in which the relevant data is generated.

There are three main types of intellectual technologies:

- operational technology (OT);
- industrial Internet technology (IIoT);
- information technology (IT).

Operating technologies are commonly used at the manufacturing enterprises. Information technologies are common at the telecommunication and media industries. IIoT is a combination of operational and information technology, it is used at different branches and fields of activity and is very popular in the modern business environment. A prime example of its use is their use at power stations. Sensors for information reading are connected with turbines, and due to this the physical and statistical data about their work, temperature, humidity, vibration, the state of physical wear of the machine, power, etc. is received. Forecast analytics programs process the resulting data and provide an immediate overview of the state of the equipment, its performance, and other benchmarks. This makes it possible to better control the maintenance of equipment, predict physical wear, malfunction, performance, etc. Thus, the information gained through the IIoT makes it possible to create a significant commercial value for the enterprise.

Hence, intellectual technologies are part of the analytical, operational and strategic management of the enterprise. If we consider them as an integral part of analytical management, then we can state that they are “electronic interface”, i. e. a program, in which control and analysis are carried out on the main indicators of the enterprise by its various structural divisions. If we consider intellectual technologies as an integral part of operational management, then due to them it can be ensured the production process, its control, etc. If we consider intellectual technologies as an integral part of strategic management, then the results of the analysis become the basis for making strategic decisions on the whole for the company and its structural divisions.

The main advantages of using intellectual technologies in the enterprise management system are the following:

- 1) increasing business efficiency by the improvement of the resultiveness of the business processes through their automatization and ensuring compliance with the requirements of specific business, industry, activity specifics, corporate rules and standards;
- 2) increasing the profitability of the enterprise due to introduction of constant automatic analysis of its activity;
- 3) the risk of “leakage of information” decreases due to the refusal of the enterprise to attract third-party organizations;
- 4) reducing costs in the long run, owing to the refusal of the outsourcing of the analysis function despite the significant previous costs of the purchase and introduction into the enterprise’s activity;
- 5) the possibility of autonomous operation due to the refusal of the “work of the network”, which at any moment may fail;
- 6) reducing the delay in the process of “receiving information – processing information – decision-making”;
- 7) increasing of “bandwidth” for reception and processing of data due to the cloud technologies and creation of data bank of the enterprise.

Most of the intellectual technologies are based on the continuous interaction of equipment, people and the environment, providing a new level of quality. Thus their implementation into the management system of the enterprise create are new quality of its realization and becomes a background for formation of the managerial capital of the enterprise.

### **3. Intellectual leadership: its essence, nature and role in the modern management system**

Global intellectualization processes, economy's transformation towards the knowledge one, increased role of innovations and intellectual economy require the changes from the company's leaders. This change should be made towards the increasing role of the intellectualization and its maintaining at the company. It is the leader who takes responsibilities for providing managerial, technological, organizational and other innovations at the company. So the new role of the leaders needs to be researched.

First, who has proposed the concept of the intellectual leadership, was James MacGregor Burns in his book *Leadership* (Burns, 1978). In his book he proposes the term "transformational leadership", by which he means "a leadership approach that causes change in individuals and social systems. In its ideal form, it creates valuable and positive change in the followers with the end goal of developing followers into leaders" (Burns, 1978).

So the intellectual leadership is related with such terms, as transformational, transactional and reform leadership. Thus, the intellectual leader attempts to transform community by creating a clear vision of the future. They do this by showing the followers how their ideas and values can change the social environment, and create a better future for everyone. We see that such opinion is upheld by B. M. Bass, P. F. Drucker and G. Hamel.

Intellectual leadership enhances the motivation, morale and performance of followers through a variety of mechanisms. These include (a) connecting the follower's sense of identity and self to the mission and the collective identity of the organization; (b) being a role model for followers that inspires them; (c) challenging followers to take greater ownership for their work, and understanding the strengths and weaknesses of followers, so the leader can align followers with tasks that optimize their performance.

Bernard M. Bass (Bass, 1985) argues that, the extent to which a leader is transformational, is measured first, in terms of his influence on the followers. The followers of such a leader feel trust, admiration, loyalty and respect for the leader and because of the qualities of the transformational leader are willing to work harder than originally expected. These outcomes occur because the transformational leader offers followers something more than just working for self gain; they provide followers with an inspiring mission and vision and give them an identity.

The leader transforms and motivates followers through his or her idealized influence (earlier referred to as charisma), intellectual stimulation and individual consideration. In addition, this leader encourages followers to come up with new and unique ways to challenge the status quo and to alter the environment to support being successful.

Intellectual leaders are idealized in the sense that they are a moral exemplar of working towards the benefit of the team, organization and community.

Modern intellectual leader must have not only the above said qualities, but predominant features of the leadership concept became the following: (a) intellectual and innovative potential of a leader; (b) knowledge and informational component; (c) high level of the cognitive development, creativity, imagination and willingness to create.

In our opinion, one unique attribute unites all the intellectual leaders: constant generation of new information and new knowledge, use of which increase the effectiveness and competitiveness of the company. Meanwhile, generating new knowledge and valuable information becomes the strategic activity of high-priority, due to which the competitive product is produced not only in the form of new technologies, know-how, discovery, product or service, but also in the form of unique approaches in business, politics, culture, art, medicine and spiritual sphere.

We take into consideration creative and imaginative feature of human cognition in analyzing the intellectual leadership concept. Human innovative culture, his/her mentality, spirituality, innovative potential is at the heart of human creativity.

Another important feature of an intellectual leader is his / her intellectual curiosity, i.e. search on heterodoxies, creative ideas and approaches to decision-making. Intellectual leader calls into question the status quo with purpose to make a breakthrough and to break away from the malaise and inertia of navel-gazing and siloed thinking that plagues many organizations (Babat).

Intellectual leaders are risk-takers. They promote experimentation, often testing the boundaries of possibilities without fear of failure (Babat). Such type of leadership is focused not only on their own capacities, but also they create tailor-made intellectual projects to involve and activate other people, “leading them toward a goal that no one can quite define before the journey begins”.

Emergence of a new leadership type, such as an intellectual leader, and extraordinary pace of intellectual technologies' implementation in the management practice, necessitates the emergence of novel management theory – intellectual management, which is an integration of knowledge management and character management. The informational systems and intellectual technologies are at the core of intellectual management and transform managerial activity towards the high intellectual activity.

#### **4. Intellectual management as the novel management theory**

The notion of intellectual management that only was simply mentioned by Ostapov (Ostapov, [2012](#)) is really novel.

An organization involved in intellectual management would be knowledge-intensive and characteristic for synchronously achieving core competence and character competence, which in turn guarantee its long-term competitive advantage.

As it was above-said, intellectual management is an integration of knowledge and character management.

By knowledge management we understand management system underpinned by information and communication technologies, which enhance the management efficient of knowledge resources including individual knowledge, organizational knowledge, technological knowledge, etc. Technologically, knowledge management include a number of information, communication and intellectual technologies, such as document management system, expert based system, information management system, decision support system, and communication and collaborative system. So, knowledge management is a pragmatic guide to the design of knowledge-based processes and their integration into businesses. Tools for knowledge management include information and knowledge management platforms such as intranet, extranet, web portals, expert database, and R&D management system which focus on management of various knowledge resources in organizations (Dengke Yu & Rong Zhou, 2015).

Character management refers to management system involving the diversity of corporate strategy, the peculiarity of organizational culture, the specialty of corporate product, and the individuality of employees. Tools for character management help to gain competitive advantages

in characteristic business, brand cultivation, and image shape (Dengke Yu & Rong Zhou, 2015).

Knowledge management and character management are important to the sustainable competitive advantage of modern organizations. Knowledge management aims to improve technological innovation while character management engages in construction of brand and optimization of corporate image. Thereby, they constitute the management system which focuses on internal and external management of organizations.

Modern enterprises are involved in characteristic management functions including strategizing, organizing, decision-making, motivating, and controlling through the integration of knowledge and character management. A perfect one would involve differentiated strategy underpinned by knowledge capability, knowledge-based organization supported by social networks and knowledge networks, compound decision-making, systematical motivation focusing on knowledge management and character management, and dynamic controlling and feedback based on knowledge collection.

So as the integration of the above-mentioned types of management, intellectual management is characterized by diversified features in terms of organization, mechanism, culture, talent, and capital, underpinned by a package of systematic tools to achieve special management functions through knowledge-based and characteristic management processes (Dengke Yu & Rong Zhou, 2015). It includes components both of knowledge and character management.

Intellectual management covers perceptual management and rational management. The scientificity and validity of perceptual management, which is often utilized by traditional enterprises and middle and small-sized firms, depend on the perceptual cognition of leaders or decision-makers. Rational management, which is supported and guaranteed by organization systems, is a kind of normalized and specialized management pattern in contrast. Thus, implementing the intellectual management in the company required the two kinds of management modes in the same enterprise, and to some extent, they should be complementary. It would be a proper decision-making pattern that determining a probable development orientation under perceptual management is followed by a specific implementation scheme based on rational analysis.

It uses knowledge-based technologies and reflecting organizational characters by integrating

management techniques to make decision-making scientific and artistic.

The suitable organizational structure of intellectual management is informal network organization which links and unites knowledge employees in contexts of knowledge networks and social networks. The knowledge management activities and innovation processes are completed on the basis of psychological contract and humanistic management. The managers should be expert-type leaders with high scores of technological level as well as management ability and personal charisma. This type of leader, who especially cares spiritual life and development environment of employees, can be a good guide and trustworthy person for knowledge workers concerning career development. In addition, the intellectual leading pays great attention to interpersonal communication and character building. The intellectual leading not only leads but also guides the talents to drive intellectual organizations.

## **5. Conclusions**

In our opinion, the concepts of intellectual leadership and intellectual management development in Ukrainian realities is not possible without (1) funding and promoting intellectual and innovation activity by the government; (2) ensuring adequate and optimal level of resourcing the intellectual and innovative activities at the national, regional, sectoral and company's levels (informational basis, equipping, vocational training and personnel policy in the innovative area, etc.); (3) creation of necessary legal framework for ensuring intellectual and innovative activities; (4) formulation of the state policy of human capital development on the basis of fostering and securing intellectual and innovative potential; (5) ensuring integration of the science, education and business, which promotes the realization of the innovative development model at the national level; (6) maintaining the adequate level of social and legal protection for the intellectual and innovative potential bearers and intellectual property.

The main implications of this study are for professionals concerning management theoretical innovation and innovative management practices. The main idea of this paper is that the intellectualization processes is impossible without initiative and participation of the intellectual leader, who triggers the innovational transformations in any company. And it is the intellectual leader, who is the guarantor of innovational changes at the company.



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## **METHODOLOGY FOR THE STUDY OF ELECTORAL CHOICE IN TRANSITIONAL SOCIETIES: THE CONSTRUCTION OF INTEGRATIVE MODELS**

**Bun Victoria**

### **Abstract**

A series of integrated models of electoral choice research is considered. As proven, at the present stage, for the theoretically consistent and empirically-adequate research of the determinants of electoral choice in the new democracies, it is necessary to construct an integrative approach based on the synthesis of the methodological tools of the classical theories of electoral choice. It was established that a significant potential for theoretical and methodological synthesis has been developed within the framework of the socio-psychological approach of the model "the funnel of causality."

**Key words:** the electoral choice, determinants of the electoral choice, the theory of electoral choice, the integrative model of electoral choice, "the funnel of causality".

Election and representation as one of the fundamental principles of modern democratic regimes led to the need of studying the motives and reasons for the behavior of ordinary voters. In the United States and Europe, over a century of research has allowed formulating a number of methodological approaches, some of which have managed to obtain the status of classical ones. First of all, we are talking about the socio-psychological, sociological and rational-instrumental theory of electoral choice. Each of these approaches cannot claim to be universal due to the fact that the behavior of voters mainly of the separately taken states was analyzed. Therefore, the methodological generalizations should be used very carefully for the analysis of elections in other states, especially in transitional societies.

Researchers in the post-Soviet space are actively emphasizing that overcoming of this drawback can be achieved through the creation of integrated voters' behavior models that would combine electoral determinants to characterize different approaches. G. Golosov emphasized this: "The possibility of synthesis of the main areas in the study of the electoral behavior arises due to the Downs' idea of saving the efforts associated with the collection of information" (Golosov, 2001, p. 242). According to this logic, within the framework of the rational-instrumental

approach, this function is performed by an ideology, a retrospective assessment of the government's actions in relation to economic policy or the expectation of voters, within the sociological approach - social affiliation and party identification within the socio-psychological theory. In this case, there is a broad possibility of building integrative theories, which can also be used to analyze electoral participation of voters in new democracies, in particular in the post-Soviet space.

Likewise, a significant potential for theoretical and methodological synthesis, as noted by the Russian researcher A. Melville, has the methodology of "the funnel of causality", developed within the framework of the socio-psychological approach (Melville, 1998). The idea of narrowing the focus of analysis, which is typical for the funnel, allows one to gradually analyze all levels of factors, taking into account sociopolitical divisions (the central category of the sociological approach), party identification (considered within the socio-psychological theory), the position of voters in relation to particular issues ( including economic ones), etc.

E. Ophenhuis, a researcher from the Netherlands, made an attempt to use "the funnel of causality" in order to construct an integrative model of the electoral choice (Oppenhuis E., 1995). Analyzing the European Parliament elections in the twelve countries of the European Union, he builds a multifactorial "funnel of causality" to explain the determinants of the choice of a particular political party. The researcher emphasizes dependent and independent variables. The first ones include social divisions (belonging to the social group and the religious community), placement on the left-right axes, materialism-post-materialism, and party size. They in turn determine the dependent variables, namely: the attitude of voters to certain policy issues, the assessment of the government and the attitude towards the European Union. The latter factor reached the funnel due to the fact that exactly the elections to the European Parliament were explored.

The proposed model indeed gives the opportunity to integrate the determinants of electoral choice, developed within the framework of various theoretical approaches. However, the researcher did not manage to avoid criticism, in particular, the principle of the selection of factors laid in the funnel causes remarks (for example, the size of the party is taken into account but the assessment of the candidate's voters is not considered).

Other possible ways to overcome the disadvantages of classical models include taking into

account the characteristics of the political process of the investigated states, the construction of non-recursive models (the influence of factors in the reverse direction), and the inclusion into the object of research voters-absenteeists.

Questions have also arisen when trying to use these approaches in post-communist countries. In transformational societies, characterized by permanent instability, constant changes in institutional design, the use of the classical theory of electoral participation can lead to significant simplifications. Only taking into account the specific cultural, economic, historical and socio-political conditions of the investigated states and specification in accordance with their existing models will expand the cognitive possibilities of classical theories and apply them to the study of post-communist states in general and Ukraine in particular.

Despite criticisms about the impossibility of using the classical theories of electoral choice in post-authoritarian countries, such attempts were made and not only by local researchers.

Most researchers build multifactorial models, combining different electoral theories. An attempt to apply a sociological theory in conjunction with a model of economic voting for the analysis of electoral processes in Poland, the Czech Republic, Hungary and Bulgaria is carried out by G. Kitschelt (Kitschelt, 1999). Analyzing the positions of parties on key economic and socio-political problems, the researcher notes the presence of two sociopolitical divisions in the post-communist party systems, namely: socio-economic (opposition between market liberalism and social protectionism) and authoritarian-libertarian. As a result of combining these divisions among the voters, two extreme positions are formed: supporters of state intervention in the economy and social protectionism, in conjunction with the preservation of authoritarian forms of government against the supporters of a market economy and the further development of civil rights and freedoms. G. Kitschelt refers to the effectiveness of economic reforms as the reason for the emergence of a socio-economic division: in the case of their absence or failure, separation does not occur, and the main determinant of electoral choice is the voters' positions on relevant issues that vary during different electoral cycles.

Such G. Kitschelt's position was heavily criticized, in particular, that "the economic modernization carried out in many authoritarian countries significantly influenced the liberalization of the political culture of these societies" (Shevchenko, 2000, p. 117). Therefore, a significant layer of people who supported the values of liberalism was formed, even though the

profit from the undertaken economic reforms was not received.

It is worth being noted that these two divisions are particularly effective during the first constituent elections and during the next one to two electoral cycles. Subsequently, in the process of establishing a democratic regime and a market economy, their role is significantly descending.

The toolkit for the model of economic voting G. Kitschelt used in the formulation of the hypothesis that in the "new" democracies, voters vote perspectively and egocentrically. This statement was also criticized, in particular, G. Golosov noted that "the question remains as to why Eastern European voters, whose democratic experience is very insignificant, are capable of thoroughly calculating the effects of their choices, showing political interest and awareness that are not available to Western citizens" (Golosov, 1997, p. 51). Such behavior is irrational in terms of a rational-instrumental approach, given the high level of political instability in the new democracies. Moreover, G. Golosov analyzed the behavior of voters in Russia with the help of the theory of economic voting and received a confirmation of its effectiveness in the "retrospective-sociotropic" version.

R. Duch researches the effectiveness of the economic model of voting in the "new" democracies, noting that changes in the economic situation determine the electoral choice not directly but indirectly. In contrast to stable democracies, where elections play a role of a referendum on an incumbent's implementation of their own economic policy, in the new democracies, in the first place, an important role is played by attitudes towards the institutional issues (attitudes towards democratization, liberalization of the political regime and economy, etc.). Unsuccessful economic reforms can provoke disappointment in democratic institutions in general and, consequently, lead to party voting with an anti-democratic and anti-market orientation. At the same time, an increase of the awareness of citizens about the authority of institutions and the economic policy of the incumbent may intensify the impact of economic factors: "The higher level of information generates a stronger connection between the economy and the electoral choice" (Duch R. M., 2001, p. 900).

In the new democracies, where the formation of executive and legislative authorities is taking place, the approach that received the name of institutional has become very relevant. It is based on the idea that the uneven distribution of powers of various branches of government results in a so-called "separate vote" - one political force wins in the parliamentary elections, while citizens

choose the other when electing the executive. Among the factors that could explain this phenomenon are: the number of institute that is elected; socio-cultural and demographic characteristics of the electorate, peculiarities of electoral systems, the time of the election of representative institutions, etc. (Shevchenko, 2000).

While electing an institution with fewer powers, voters take into account the state's economic policy and vote instrumentally, "punishing" or supporting an incumbent. Instead, ideological identification dominates during the election of the "stronger" institution. Voters prefer a party (a candidate) whose ideological ideas are closest to their own, since the elected institution has the power to formulate a strategic political course.

Consistent with the institutional theory is the concept of "first-order" and "second-order" elections, promoted by K. Reif and H. Schmidt (Reif K., 1980). Researchers also state the difference in voting for institutes with different powers. Second-order elections (K. Reif and H. Schmidt consider such elections to the European Parliament as opposed to elections to national legislatures) are characterized by the following features: 1) low turnout; 2) the victory is most often received by opposing parties; 3) the main determinant of the choice is the ideological dimension of the competition, rather than the current electoral issues and the image of the leaders.

The latter statement contradicts the idea of an institutional approach to instrumental motivation in the election of a "weaker" institution. We believe that ideological identification determines the result of voting in second-order elections of those who occupy an extreme position in the ideological spectrum. By choosing a "stronger" institution, they can vote for a more centrist party, hoping that it has a better chance of getting into the parliament. It is the fear of losing their own voice in case the selected party would fail to pass into the parliament and reluctance that a certain political actor would win (the phenomenon of voting "for the lesser evil") that can explain the movement of voters to the middle of the ideological spectrum of the election institute with higher powers set. Instead, at the elections of the "weaker" institution, such voters allow their ideological preferences to be fully realized. However, inconsistency of the statements of these two approaches shows that both institutional approach and the theory of the election of the second and first order are poorly understood and need further refinement using more empirical base.

Consequently, classical theories did not remain unnoticed when analysing the determinants of

the electoral choice in the new democracies, becoming, in particular, the methodological basis for the research of Russian and Ukrainian scholars. However, their effective use depends, first of all, on the proper operationalization of the concepts: "The main task facing the researcher in shaping the concept of electoral choice is not so much the designation of the determinants of choice, but the operationalization of concepts based on Western approaches" (Anokhina, 2000, p. 152).

G. Golosov, a Russian researcher, proves the effectiveness of the Russian conditions of the classical theories of electoral choice, ranking them in the following way: the most effective is the socio-psychological, in the second place - the theory of economic voting and then the sociological approach. The findings of the researcher are based on the analysis of regional elections, but they may as well be extrapolated to the results of national elections. The research of G. Golosov is interesting, first of all, because he carries out the operationalization of the central categories of each approach. In particular, the "socio-political divisions" researcher determines as the percentage of urban residents in the population of the region, "party identification" as the percentage of votes received by B. Yeltsin in the second round of the presidential election. With regard to economic voting, the researcher decides to check the sociotropic and retrospective version of the theory, using for operationalization the rate of division of budget expenditures per capita into the "consumer basket" price. G. Golosov constructs this indicator specifically for use in Russian conditions, given the impossibility of using the categories of unemployment and inflation, due to the high level of hidden unemployment and permanent crisis phenomena in the economy.

The resulting correlation coefficients of the selected variables and the results of regional elections show a rather high explanatory potential and prove the effectiveness of the classical theories, and, therefore, deny the thesis of uniqueness of models of voters' behaviour in post-communist democracies and the impossibility of accurately predicting elections in these states.

Some aspects of the research were criticized, in particular, the impossibility of combining independent variables into a single regression equation, the inability to carry out a long-term prognosis with the help of the constructed model, the absence of a model of the factor of personal attractiveness of candidates. However, the study of G. Golosov is important, first of all, because it is one of the few successful attempts to apply Western electoral theory to the analysis of single-shift processes in the post-communist states, in this case, Russia.



The answer to G. Golosov's research was the article by Y. Shevchenko (Shevchenko, 1998). The researcher, using the classical electoral theories, also tries to construct an explanatory model adequate for the post-communist states. First of all, Y. Shevchenko excludes from the sphere of analysis the sociological approach, emphasizing the kinship of the motivations of electoral choice in sociological and socio-psychological theories: "Solidarity is one of the main motivations of electoral choice, the difference between the theories lies only in the following: according to the first of them the voter by voting expresses solidarity with the social group to which it belongs, and according to the second, it solidarizes itself directly with the party "(Shevchenko, 1998, p.130). Thus the investigator excludes from the scope of analysis the sociopolitical division, the main category of the sociological approach. In general, Y. Shevchenko constructs an integrated instrumental approach, emphasizing that the main tool for forming an electoral choice is the assessment of own economic situation and ideological identification. In order for the model to be used in practice, the researcher carries out the operationalization of concepts. The economic factor - the level of material well-being of citizens in the dynamics: ideological identification - an indicator used by G. Golosov for the operationalization of the category of "party identification"; the ability of the incumbent to represent the prevailing ideology in the eyes of voters - an indicator of political fragmentation in the region.

The approach formed by Y. Shevchenko is important because it is an attempt to synthesize theories of electoral choice on the basis of a rational-instrumental approach. The ease of its use is a significantly positive feature. However, his approach deserves some criticism, since central concepts are operationalized using indicators that can only be obtained 'post factum' after the elections. However, if we take into account the fact that the researcher did not intend to predict the elections, then another goal - the definition of the determinants of electoral choice - was achieved.

What is positive in Y. Shevchenko's approach is the ability to explain the dynamics of electoral choice. Different ratio of factors of choice, the influence of external stimuli (mainly political factors) and the ability of citizens to accumulate information and rethink their own position over several electoral cycles are considered to be reasons for changes in electoral behavior (according to Y. Shevchenko): "Participation in several elections going one by one leads to the change of the behavior of voters, which is gradually approaching optimal "(Shevchenko,

1998, p. 133). "Optimal" behavior in this case means a situation where the voter's preferences are in a state of equilibrium and the electoral choice is equally influenced by an assessment of the economic situation and ideological identification.

Despite certain disadvantages, Y. Shevchenko's approach is important for further theoretical studies, since it is an example of the synthesis of classical approaches, and is specially developed for post-communist societies.

The study of O. Meleshkina is particularly interesting in terms of the integration of different approaches. In order to analyze the electoral choice in the Russian Federation, she used the socio-psychological approach and model of "the funnel of causality" as the basis for methodological synthesis.

In the widest part of the funnel there are factors that characterize the political situation in the country as a whole. Taking into account the specifics of the development of the political process in the Russian Federation, the researcher, in addition to social divisions and political traditions, introduces such factors as peculiarities of the transition period and institutional design. At the next level, there are political values and orientations, as well as the position of voters on particular issues. The third level of the funnel includes the assessment of political parties and blocs involved in the elections. The attitude towards candidates and parties directly affect electoral choices.

In the model there are no such factors as party (or ideological) identification and voters' assessment of political courses as they are not relevant in Russian conditions. According to H. Meleshkina, "positions of political competitors, including incumbents, are often very uncertain" (Meleshkina, 2002, p. 51), and it is not necessary to consider the assessment of policies as an important factor.

The described model, as well as a classic version of "the funnel" contains exogenous factors, namely the media, especially the election campaign, the views of friends and acquaintances, the current political and economic situation. These factors are effective in the short term during a particular election campaign.

While constructing a model, the researcher does not claim its universality and makes a number of remarks about its use, namely: the difference between the factors that determine the electoral

choice of supporters of different political parties, the difference in the factors of electoral choice in parliamentary and presidential elections; the transformation of the explanatory potential of factors over time; technical difficulties associated with the possibility of empirical model verification (Meleshkina, 2002, p. 52). At the same time, the constructed model has a considerable explanatory potential, provided that it is filled with adequate empirical indicators.

Attempts to use the model of "the funnel of causality" to explain the regional peculiarities of the electoral process in the Transcarpathian region are carried out by Ukrainian researchers M. Vegesh and Y. Ostapets. Along with the sociological theory, they use this model as the methodological basis of their own research. Based on the logic of the funnel, which involves analyzing electoral choices with the help of a gradual movement from macro to micro factors, researchers offer five levels of variables: the foreign policy level; nationwide level; regional level; the level of small social groups (citizens are included) individual and psychological characteristics of the voters in the region (Vegesh, 2003).

Although the researchers make certain remarks about the application of the model (limited possibilities of electoral choice forecast, the specifics of the election campaign, the need to combine them with the public opinion monitoring), the study conducted by M. Vegesh and Y. Ostapets demonstrates the validity and justifiability of this methodology.

The Ukrainian sociologist O. Vyshnyak offered his own version of the electoral theory. After analyzing the classical theories of electoral choice, the researcher substantiated the "ideological and economic concept of electoral behavior of voters in post-socialist countries that are moving to democracy, the essence of which is that the most active part of the voters votes in accordance with their ideological preferences, while the other part is situationally economic, that depends on the level of subjective satisfaction with the living conditions in a period when there was a certain president or government (parliament) (Vyshnyak, 2001, p. 9).

Explaining the proposed approach, the researcher emphasizes not only the possibility of identifying the main determinants of electoral choice, but also the ability of this theoretical model to predict the results of the election. The proposed theory of ideological and economic voting also explains the level of electoral activity and the causes of absenteeism. In particular, among the factors of election activity, O. Vyshnyak calls the level of party and ideological identification of voters (voters with a well-established ideological identity usually exhibit a higher level of

activity) and the subjective importance of specific elections for the citizens of the state (similar to the concept of primary and secondary elections, it is determined by the volume of the authority of the elected institution, as well as by the level of ideological polarization of the main candidates, parties or election blocs).

O. Vyshnyak's conclusions are echoed with the corresponding statements of Y. Shevchenko about the influence on the electoral choice of such factors as assessment of their own economic situation and ideological identification. In general, the researcher facilitates a fully justified integration of socio-psychological and rational-instrumental (in particular, its "economic" version) approaches, which allows overcoming some disadvantages of classical theories of electoral choice and using them to analyze political systems that are transforming, including Ukraine.

The conclusions of a number of studies conducted in other sciences, in particular sociology, psychology, geography are interesting and useful for the analysis of determinants of electoral choice.

V. Myroniuk carries out his own analysis of electoral choice determinants with the help of electoral geography methods. The researcher emphasizes that combining the political and psychological aspects of electoral geography allows us to analyze both the electoral behavior of an individual and the territorial differences in the ratio of the electoral preferences of voters in certain regions: "An important result of electoral-geographic research is the electoral division of the territory with respect to political culture or political preferences electorate "(Myroniuk, 2002, p. 13).

K. Cherkashyn considers the ecological approach close to electoral geography to be adequate for the study of electoral behavior of Ukrainian voters (Cherkashyn, 2005). Comparison of the social, economic, cultural-historical, ethnic, climatic and other features of the territories with the results of voting allows us to determine the most important factors of electoral choice, namely: regional division (referring to the center or periphery), socio-economic factor, geographical, level of internationalization, political situation at specific elections. The researcher believes that the advantage of the approach is that it is based on the results of electoral statistics, and not sociological studies that may be subjective. Along with the use of the ecological approach, the researcher uses the categorical apparatus of the sociological approach, in particular the "electoral

split" category, which may indicate a combination of principles of two approaches within the framework of the study of electoral behavior of Ukrainian voters.

The regional dimension of electoral choice is in the focus of the study of V. Berezinsky (Berezinsky, 2005). Based on a structural approach that combines social and geographical factors, the researcher constructs an integrated model of the electoral space characterized by a combination of the ideological and power-oppositional dimension. It allows the regions to be divided into four groups (white, gray, explosive, oppositional belts) in accordance with the balance of forces, formed between the pro-government and opposition parties.

Such an integrated approach allows a holistic analysis of the transitive features of the electoral space of Ukraine. For this study, it is interesting, first of all, from the point of view of the possibility of integrating different approaches in the conditions of the transitional Ukrainian society.

The study of A. Lytvyn is concentrated on the definition of socio-structural factors of the electoral choice of Ukrainians. Although his methodological basis is the conflictualistic approach, however, the conclusions and provisions of novelty coincide with the main assertions of sociological theory. In particular, A. Lytvyn carries out empirical verification of the socioclass division of Ukrainian society and captures the dominant influence on the electoral choice of socioclass identity: "Socio-class identity and the electoral behavior associated with it in the modern Ukrainian society are dominant, significantly exceeding other forms of identification (ethno-cultural, religious, gender-age, socio-occupational, regional-territorial, etc.)" (Lytvyn, 2003, p. 10).

Although this statement raises some criticism (in particular, the unjustified diminishing of the role of territorial division), it does confirm the possibility of explanation of electoral choice factors of Ukrainians in the categories of sociological approach. At the same time, A. Lytvyn puts forward a few remarks, in particular, he notes that "in a non-structured society of a transformational type, the influence of structural factors is significantly weakened, and the behavior of electoral groups becomes more situational" (Lytvyn, 2003, p. 13). With this statement, one can also partially agree if, given the situational factors, it is necessary to take into account the specifics of a particular election campaign, the current political situation, and the influence of the media.

The psychologist D. Poznyak analyzes the socio-psychological approach and interprets it in accordance with the objectives of the study. He states that the mechanism of political identification is one of the universal regulators of political consciousness. At the same time, the rational-instrumental approach is evaluated as less productive in post-communist transformational societies, and the electoral choice is defined as "rational-intuitive, whereas pragmatic (rational-behavioral) voting in the countries of Western democracies is the basis of citizens' political activity" (Poznyak, 2004, p. 42).

R. Starovoytenko offers a political and psychological approach to the analysis of the factors of electoral choice. The substantiated concept actually denies the possibility of rational decision-making by citizens, and among the factors of choice there is a dynamic, largely unconscious complex of political images: "the choice is made not so much by making an individual decision, but within representations, social stereotypes, and attitudes imposed by joint actions of "Opinion leaders" and by means of mass communication"(Starovoytenko, 2003, p. 9).

The researcher combines the position of the socio-psychological theory (the desire to join the party - the favorite of the electoral competitions), the sociological approach (taking the position of the reference group, emphasizing the importance of the media's influence on the choice) and the idea of C.G. Yung of the collective unconscious. Such theoretical and methodological approach to the analysis of electoral choice is explained by the specific subject of the study - the image of the political party. The conclusions of R. Starovoytenko are interesting for us, first of all, from the standpoint of an attempt to integrate various theories of voter behavior and apply them in the conditions of modern Ukrainian society.

In conclusion, the analyzed studies demonstrate numerous successful attempts to use the classical theories of electoral choice in conditions of transitional political systems. However, all three approaches (sociological, socio-psychological *and* rational-instrumental) have certain disadvantages and their use alone will not bring relevant results. For an adequate analysis of the electoral behavior of Ukrainian voters, it is expedient to construct an integrative concept of electoral choice.

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## **LIBERAL IDEA IN THE UKRAINIAN POLITICAL THOUGHT OF THE 20-30s OF THE TWENTIETH CENTURY**

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### **Abstract**

The article analyzes the essence of the socio-political and national-state ideas of the Ukrainian political thought of the liberal direction in the 20-30s of the 20th century in the discourse of personal freedom. The author carries out a comparative analysis of the national liberal thought and European political concepts of freedom, substantiates the commonality of approaches. The theoretical foundations of the concept of the Ukrainian political thought of the liberal direction concerning the personal freedom as self-realization and self-activity are revealed. It is proved that according to the ideological principles of the liberal Ukrainian political thought, the spiritual and ethical principles of the person and society are fundamental in the formation of a comprehensive basis of responsible personal freedom, the refusal of respect for memory of past successes and defeats, traditions, and rituals not only would be, but is a waiver of the right to self-realization of the personal freedom, bringing the individual to the status of a de-personified object, who is not connected with the past or the future. It is revealed that in the Ukrainian political thought of the liberal orientation the state was considered an instrument for ensuring the socio-cultural space of the realization of individual freedom. The applicability of theoretical work of the Ukrainian political thought of the liberal direction for the modern political practice in Ukraine is determined.

**Keywords:** Ukrainian political thought, liberalism, democracy, freedom, person, conservatism, nationalism.

Under the conditions of complex ideological interpretations, caused by the crisis of the established forms of human existence, the content of liberalism is also subject to revision.

Analyzing the Ukrainian political thought, the “classical” version, represented by such figures as Alexis de Tocqueville, John Stuart Mill, Karl Popper, Friedrich von Hayek, is taken as the basis. Their views, perhaps not always known to Ukrainian political thinkers and activists, were closer to them and more understandable.

The main Ukrainian political force in the 20-30s of the twentieth century, which can reasonably be considered liberal, was UNDO – Ukrainske Natsionalno-Demokratychnе Obiednannia (the Ukrainian National Democratic Alliance, founded in 1925), the most influential legal Ukrainian political force in the 20-30s of the twentieth century in western Ukraine. At that time, there was no chance for a minimum free political activity on the eastern Ukrainian lands controlled by the Soviet regime. Ideologically, liberalism is opposed to conservatism, various forms of statism (socialism, communism) and nationalism. All that was reflected in the works by UNDO figures.

One of the leaders of UNDO, Z. Pelenkyi, analyzing the violent intervention of the then Polish state, wrote: “One more question is put by the peasant. Why is only the village sentenced to forced labour? Why is not the *scharwerk* (compulsory public works. – I.V.) introduced in a big city? In town it is sufficient to pay a tax, and in the village you have to do forced unpaid work (...). And why does a poor peasant, who deprives himself in order to pay a tax, have to go hungry to the *scharwerk*” [Pelenskyi, 1935, p. 8].<sup>1</sup> Such an extensive quotation shows us an example of the use by the government of purely administrative levers of governance, making impossible, or at the best, complicate the realization of human freedom. The authorities place the person in the exclusive dependence on the subjective wishes of officials endowed with administrative powers, who rely solely on coercion in the logic of their actions. “Therefore, it is not the will of a citizen, not the real need of the population will decide on forced labour, but the arbitrariness of administrative forces” [Pelenskyi, 1935, p. 9].<sup>2</sup> Z. Pelensky briefly and, to a certain extent, critically outlines a wide range of problems – both administrative pressure and the disenfranchisement of “self-government”, which thus even exacerbates the alienation of a person from the practical realization of their freedom.

He raises the problem of limiting or even complete eliminating of human freedom through

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<sup>1</sup> Pelenskyi, Z. (1935). *V oboroni nashoho sela. [In Defense of Our Village]*. Buchach, Ukraine: Ukrainian Selective Committee in Buchach.

<sup>2</sup> Pelenskyi, Z. (1935). *V oboroni nashoho sela. [In Defense of Our Village]*. Buchach, Ukraine: Ukrainian Selective Committee in Buchach.

formal legal institutions, which in practice are designed to prevent the self-realization of individual freedom through their own initiative, through a deliberate act, even if it is of a purely humanitarian nature, in addition, at the expense of that person. An attempt to self-realize the potential freedom is punishable, thus paving the way for denying the legitimacy of this power, providing the person with the right to form a different legal and institutional mechanism to secure their rights and freedoms. In those concrete historical realities, the defense of the idea of the independent Ukrainian state is reflected.

While analyzing the people's democratic, oriented towards liberal values, direction of the Ukrainian political thought, there arises a problem of insufficient ideological, theoretical and worldview provision of its position. In particular, the representative of the Ukrainian conservatism S.Tomashivskyi drew attention to this investigating the programmatic principles of the UNDO (Ukrainian National Democratic Alliance).

He rather critically evaluated both the practical activities of the UNDO and its theoretical work. S.Tomashivskyi rightly refers to the use of common phrases, formally "progressive" but, at a more critical consideration, banal, and even dangerous to the realization of individual freedom. Uncritically perceived, they can create prerequisites for manipulating the consciousness of society, relying on indulging the human weaknesses. "In particular, what can be said about such a statement: "All class or social contradictions (the party) resolves in a democratic way"? One can understand here anything: both "rob what was robbed" and "beat the intelligentsia", and the election, for example, of bishops at the town's meeting in Lysenko hall, and many other "democratic ideals" [Tomashivskyi, 1929, p. 20].<sup>3</sup> Aristotle warned of the dangers of such practices: "The demagogues, bringing officials to court, emphasize that the people (the demos) must judge them. The people willingly listen to their proposals, due to what the role of state institutions is reduced to nothing" [Aristotle, 2000, p.107].<sup>4</sup> And thus, a declaratively "free" citizen at any moment can appear defenseless in the face of an emotional power, often skillfully organized. Freedom of the person demands responsibility.

S. Tomashivskyi gives attention to the constantly actual problem – the distance between the ideal and the materialization. He does not deny the ideal, but also emphasizes its inalienable

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<sup>3</sup> Tomashivskyi, S. (1929). *Nasha chilna partiia u vlasnomu zerkali. Krytychni zamitky* [Our Leading Party in Its Own Mirror. Critical Notes]. Lviv, Ukraine: Author's Edition.

<sup>4</sup> Aristotle. (2000). *Politics*. [Translated from Old Greek and foreword by O.Kysliuch]. Kyiv, Ukraine: Osnovy Publishing House.

constructive function, at the same time warning against the utopian sentiment for the immediate construction of a perfect society. It is natural that there is a discrepancy between the ideal and the existing system of political relations. The greatest possible effort should be made to realize as many values as possible, which can ensure the realization of freedom. But in the case of the inconsistency between the existing state and the imaginary ideals, one has to think about whether the requirements are real, or whether the struggle for their immediate achievement transforms the existing state into a hostage of reckless ambitions and destroys the existing rights and freedoms. Obviously, such warning cannot be extended to totalitarian regimes, the essence of which is the denial of the very possibility of human freedom.

The Ukrainian political thought of the liberal-democratic direction sought to overcome the alienation of the Ukrainian community from the real possibilities of realizing their rights within the legal field. And therefore, constant attention was paid to the actual neglecting by the authorities of even those limited guarantees that were declared. In particular, V. Mudryi (one of the founders of the UNDO, chairman of the party since 1935, deputy of the Polish Sejm) emphasizes the lessons of the common historical past, which should convince the authorities of the inevitability of providing the Ukrainian national minority in Poland with political and economic rights and freedoms. There is no other way for social progress except for the establishment of individual freedom. Confrontational mechanisms of forming the political reality, aimed at the forceful denial of the rights and freedoms of others, cannot have a positive outcome for any of the parties.

At the same time, V. Mudryi seeks to solve the problem – to suggest a mechanism for self-realization of personal freedom. He emphasizes the direct connection between the individual, personal freedom and the collective, organized actions of the community. “Therefore, under the new conditions, we had been struggling for many years for the very right to life, but not individual, but collective, national. And under those conditions we further carved the individual face of our people, tempered their Spirit and taught them endurance, patience and continuous labour in order to ground the life of a homogeneous national organism” [Mudryi, 1936, p. 7].<sup>5</sup> Actually, the most attention is called to the words about endurance and continuous labour, which are different from the position of the “left”, who sought to convince of the absence of the need for

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<sup>5</sup> Mudryi, V. (1936). *Za normalizatsiyu polsko-ukrayinskyi vidnosyn* [For the Normalization of Polish-Ukrainian Relations]. Lviv, Ukraine: Dilo Publishing House.

personal continuous efforts. While the Ukrainian liberal thought, being aware of the complexity of political and socio-economic relations, emphasized the impossibility of solving them, ignoring the person. The complication of social relations requires an increase in the demands from a person, but not through aggressive coercion, but by providing a free, responsible person with the opportunity to exercise their own freedom within the human, cultural and civilizational circle, constantly expanding it. That is possible only through the individual efforts of a person who is able to act by taking control of their own destructive instincts or incitement of emotionally unbalanced people. Under the conditions of the then extreme social inequality, it was necessary to have extraordinary courage not to speculate on that, not to stir up emotions, when there are enough facts for such agitation. One should work on the implantation of endurance, diligence, should temper the spirit of the individuality but not of the disorganized crowd. V. Mudryi does not only criticize certain negative moments of the reality, but also concentrates on the positive aspects of self-organization of the Ukrainian community, expecting that their implementation would turn conversations about personal freedom into a practical plane.

The representatives of the Ukrainian liberal-democratic thought understood the danger of propaganda of radical ways to solve political and socio-economic problems. In their opinion, the struggle conducted by such methods cannot, to the full extend, have positive effects on the establishment of personal freedom. V. Tselevych (Secretary-General of UNDO, deputy of the Polish Sejm) criticized the creation of underground movements based on the idea of violence. In his opinion, “Revolts, rebellions, acts of terror, and sabotage are very often in the interest of the ruling nation and are very often organized by the bodies of their security police. (...) As a result of this, a great percentage of citizens fall into despondency and indifference and they avoid any civil work, even in legal institutions” [Tselevych, 1934, p. 75].<sup>6</sup> He also emphasizes the perception of radical actions by the world community, being not very well-informed in local relations, and to some extent, not inclined to thoughtful interpreting of them.

“The world press considers the expropriation to be ordinary robbery attacks, and arsons of private property – an expression of anarchic attitude. Every foreigner understands that no authority in the world can tolerate violent means of struggle and it is self-evident that the authorities, in the interests of the social system, must ruthlessly fight them” [Tselevych, 1934,

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<sup>6</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

p.76].<sup>7</sup>

Arguments for activities within the constitutional state appear to be quite reasonable. Poland of the interwar period was partly constitutional, and the following totalitarian regimes – Stalin’s and Hitler’s, were the absolute denial of the idea of the personal right and freedom, when democratic institutions and procedures do not exist (in fact), and the idea of human rights and freedoms is declared to be a crime against the existing system; therefore, the criticism of the tactics of the Organization of Ukrainian Nationalists – OUN (and actually it was spoken about in these words) is generally sound but not objective. At the same time, it allows us to understand the position of UNDO as a political force oriented to liberal democratic values – the respect for legitimate government institutions, designed to ensure the security of citizens and the possibility of citizens’ participation in the formation of governance, the right of citizens to protect private property – in particular, the right to various forms of participation in a wide range of political, economic, spiritual and cultural life of the state. The criticism of secret organizations pursued the same goal since the structure and methods of their activity inevitably limit the freedom of the individual, make them dependent on the decisions of others. And these decisions often cannot be controlled, doubted or criticized. The decision-making center appears to be outside the person and their ability to influence it in one way or another, and the decision itself appears to be of a mysterious origin. V. Tselevych emphasizes the dangers of a non-legal struggle, which being motivated by the most noble intentions, can be dangerous for the persons themselves, not even in the physical sense, but in moral and spiritual. He strives for the active youth’s energy to be directed towards the constructive work of civil society. It accelerates the civilizational and cultural development of the community and at the same time limits the absolute control of the state over huge areas. As a whole, it contributes to the formation of the individual’s independence, their ability to independent action, the ability to unite in certain organizational structures for solving some socially significant problems and interact within them in order to achieve a positive result. Actually, the socialist model of social relations completely destroyed such civilizational gains of the Ukrainian community. As an illustration of successful formation of the elements of civil society in the non-state period, V. Tselevych exemplifies Ireland. “The development of Irish schooling of all types, with the University of Dublin – including, contributes to the rise of education among the Irish, to the spread of national consciousness, to

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<sup>7</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

the training of fighters for people's rights. Understanding the importance of the self-government for the nation, the Irish take over the public and local self-government, and in 1873 they put forward the slogan "Home Rule", that is, the autonomy of Ireland with a separate Irish parliament" [Tselevych, 1934, p. 83].<sup>8</sup>

The analysis of K. Levytskyi's thoughts allows us to get an idea of the views of the Ukrainian national democracy on the self-realization of personal freedom. His small work entitled "Rights of National Minorities" is interesting in this regard. First of all, the author states: "In the modern state the final constitutional basis is determined: full equality of all citizens with no difference in nationality" [Levytskyi, 1923, p. 12].<sup>9</sup>

K. Levytskyi is conscious of the basic meaning of a stable and progressive development of society, which seeks to provide the individual with the opportunity to self-fulfillment – the unity of rights and responsibilities. Elimination of one of these is devastating, both for the individual and for the society. "When all citizens of the state with no difference are required the same responsibilities for the state, the state is obliged to give all its citizens the same rights, and only then the state can be strong and safe" [Levytskyi, 1923, p.13].<sup>10</sup> K. Levytsky, in order to have a more concrete discussion about the possibilities of securing the personal rights, suggests a rather comprehensive list of liberal-democratic freedoms.

"In particular, the state should entrust all its citizens with the common rights, as state citizenship, to equality before the state and its laws, to admissibility to all state authorities, to free living and disposal of their property, personal freedom, as well as freedom of speech, religion, etc. And here cannot be any exception" [Levytskyi, 1923, p.13].<sup>11</sup>

V. Tselevych persistently advocates the concept of civil society as the basis for the state's life, that is, the rule of law. And such a state can exist primarily due to conscious citizens and not only due to the right legal standards. Obviously, they are necessary, but rather secondary, as far as the spiritual atmosphere that prevails in society is concerned. "In short, the Irish through their own efforts, through the organized struggle and development of all spheres of life are becoming a modern nation matured to an independent life" [Tselevych, 1934, p. 83].<sup>12</sup> This is a confirmation

<sup>8</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

<sup>9</sup> Levytskyi, K. (1923). *Prava natsionalnykh menshyn*. [Rights of National Minorities]. Vienna, Austria.

<sup>10</sup> Levytskyi, K. (1923). *Prava natsionalnykh menshyn*. [Rights of National Minorities]. Vienna, Austria.

<sup>11</sup> Levytskyi, K. (1923). *Prava natsionalnykh menshyn*. [Rights of National Minorities]. Vienna, Austria.

<sup>12</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

of the manifest truth that, in general, a person is primarily concerned with solving their own problems and problems of their nearest and dearest. Public activity gives an opportunity to maximize the number of these nearest and dearest. It promotes the formation of non-personal ideals, the overcoming of primitive selfishness, oriented solely to biological survival, however comfortable it would be. Criticizing supporters of the radical ways of solving the complex social, political and cultural problems that confess the idea of “the worse the better” and summing up their reflections on this issue, V. Tselevych remarks: “It seems that the best conditions for the liberation struggle should be in Great Ukraine, because the living conditions are the worst there, because millions of Ukrainians die of hunger there, because there are mass shootings, because there are the Solovetsky Islands. But this is an obvious lie. As long as the peasantry had what to eat, they made armed insurrection. Today hunger weakens the power of the peasantry and now it is as quiet as the grave is there” [Tselevych, 1934, p.97].<sup>13</sup> V. Tselevych emphasizes one more problem, which is extremely important for understanding the liberal interpretation of freedoms. “The statement that all means are allowed justifies the worst acts and the greatest crimes, and turns people into a state of savagery. In the life struggle a cultural person differs from a savage, as they use noble and chivalrous means” [Tselevych, 1934, p.98].<sup>14</sup> He is extremely expressive and accurate in depicting the nature of the political struggle, depending on the selected value criteria. The society or a separate individual must be ensured at least elementary material conditions, minimal personal security so that they could participate in the protection of their rights and freedoms in one way or another. If a person is put beyond the scope of survival guarantees, they are subjected to continuous physical and psychological pressure, there are no grounds to demand political maturity and simply personal courage from them. The development of the same opinion is the words about the condemnation of immoral methods of struggle, which are a sign of barbarism. And he also supports those means of political struggle, which do not degrade the dignity and honour of the other party, do not condemn them to the material, physical, moral suffering, do not deprive them of any legal, juridical means to protect their rights.

The importance of involving the individual in public life was emphasized by J. S. Mill: “The maximum healing effect of freedom on the character of an individual can only be achieved if he

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<sup>13</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

<sup>14</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine..



is or is very eager to become a citizen with the same rights as anyone else” [Mill, 2001, p.175].<sup>15</sup>

In general, V. Tselevych's remarks are sound and show a genuine understanding of liberal and democratic values, when the very possibility of authoritarian tendencies provokes condemnation, even if it emerges from politically close forces. Particular emphasis should be placed on the idea that the used radical political means have the most tragic consequences if such tools make use of the state apparatus. A classic example of this was the totalitarian regime in the USSR and Nazi Germany. The following V. Tselevych's opinion is completely right: “Uncontrolledness permits abuse” [Tselevych, 1934, p. 102].<sup>16</sup> Such a situation arises in the systems where there are no transparent, understandable for all relations, where there is no possibility to rely on the law, and at the same time the authority is extended. It creates temptation for some and limits the freedom of others. In the meantime, liberalism [is premised on the idea that](#) proactive, free economic, political, social activity of individuals is the main source of advancement in public life. Liberalism advocates the value of the human personality. Its goal is to weaken the various forms of state and social coercion towards the person, and the way of peaceful, reformist implementation of social transformations.

Following on from the principles of a stable, at least, elementary legal society, V.Tselevych defines the following mechanism of self-realization of individual freedom: “Therefore, the first goal of young people must be to get a tool, the basis of their own existence. The ones who do not do this, do not try to do this, will be a burden for their parents, their surroundings, for the nation” [Tselevych, 1934, p.104].<sup>17</sup> As we see, despite the complicated socio-economic and political conditions of the time, V. Tselevych does not waive personal responsibility for their own destiny. First of all, they through their own efforts must take care of solving their own domestic difficulties. And on this basis, acting consciously, obtaining the appropriate education, profession and work, must contribute to solving not only their own domestic problems, but also use them for socially useful causes. By comparison, the socialists all the issues passed on to the society. Such an approach encourages the formation of dependence on the state patronage and others' decisions. Objective conditions are created in which restrictions on the freedom of a person appear to be natural, regular and even socially necessary. The individual himself loses the need

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<sup>15</sup> Mill, J. S. (2001). *On Liberty: Essay* [translated from English]. Kyiv, Ukraine: Solomiya Pavlychko's Osnovy Publishing house.

<sup>16</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

<sup>17</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

for self-realization of freedom, because it adds to the troubles. Actually, the same problem that threatens the democracy from the time of antiquity was pointed out by B. Konstan: “The threat to ancient freedom consisted in the fact that people, engaged solely in providing the distribution of public power, disregarded personal rights and benefits. The threat to modern freedom consists in the fact that, being concerned about the use of personal independence and pursuing our private interests, we can easily abandon our right to participate in the exercise of political power” [Konstan, 1993, p.105].<sup>18</sup>

V. Tselevych, as a political thinker, constantly invites attention to this issue as an integral condition for the guarantee of personal freedom. “When, e.g. during some elections, the masses showed complete indifference to the elections, divided and revealed the lack of solidarity, it would be the best indicator for the world that the strength of that nation weakened, that it was the right time for the further liquidation of the life” [Tselevych, 1934, p. 113].<sup>19</sup> V. Tselevych continues to reasonably defend, characteristic of him, liberal and democratic values, including in the political sphere, focusing on the fact that participation in the political life is the right that requires confirmation with constant and conscious efforts. Otherwise, it becomes a meaningless slogan, or rather – a cover of despotic power. Democratic procedures cannot be neglected, their effectiveness is ensured by the continuous efforts of conscious participants who are able to make efforts to achieve their implementation.

“Because small, seemingly unimportant things, undertaken by millions, and every one on his own behalf and for himself accomplishes them, will surprise you with the far-reaching, just historic consequences” [Tselevych, 1934, p.114].<sup>20</sup> A little further V.Tselevych is too optimistic, in our opinion, in his remark: “It cannot be denied that the authorities may cease the existing external forms of organic labour, but there is no and there will not be such a force in the world that could prevent the work of millions. When some forms of labour, some forms of competition are prohibited, then the labour searches for new organic forms, new ways” [Tselevych, 1934, p.114].<sup>21</sup>

In this case one can hardly agree with V. Tselevych. Already at that time there was an

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<sup>18</sup> Konstan, B. (1993). O svobode drevnikh v yeye sravnenii so svobodoy u sovremennykh lyudey [On the Freedom of the Ancient in Comparison with the Freedom of the Modern People]. *Polis*, 2, 97-106.

<sup>19</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

<sup>20</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

<sup>21</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

extremely effective system of liquidation of any constructive activity, of even millions, if it was not sanctioned or not controlled by the authorities. The main point of the activities of totalitarian regimes was the destruction of the very possibility of any individual's self-activity, the destruction of any form of union that could prevent the establishment of total control over a person. Considering the principles of the society that recognizes, at least remotely, the freedom of a person, V. Tselevych assumes: "The authorities can e.g. prohibit the existence of economic institutions which are the main engine of economic life. But then the economic development of the nation can be concentrated in the thousands, or even hundreds of thousands of private enterprises" [Tselevych, 1934, p.115].<sup>22</sup> These proper remarks made sense in the partially legal Poland of the interwar period and they were completely unrealizable under the conditions of the Soviet totalitarianism.

The political thinker confirms the orientation towards the individual who seeks to exercise his own freedom, even under unfavorable conditions; towards the consolidation of the values of a civilized society, which involves respect for human labour and its results. It is based on moral and ethical principles and does not seek to turn the community into a state of barbarism, Hobbes' "war of all against all", where the sense of conscious activity disappears, and the main thing becomes survival and consumption, mainly at the expense of the resources of others.

Turning to the history of the Ukrainian political thought is intended to emphasize once again that the ideas of "inevitable and continuous progress" are rather dangerous than stimulate the progress of mankind. The mentioned Ukrainian political thinkers created after the First World War, and most likely counted that those things would not happen anymore. In reality, the history is multivariate. A tyranny of any type can only be opposed by a free citizen, whose freedom is ensured by legal and political institutions. By improving the procedural and institutional mechanisms designed to ensure the realization of individual freedom, it should be borne in mind that the threat to liberty is both abuse of its advantages and excessive patronage of the authorities. For the XXI century the lessons of intellectual and political life in Ukraine of the 20-30s of the twentieth century are an important warning and material for political practice.

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<sup>22</sup> Tselevych, V. (1934). *Narid, natsiia, derzhava* [People, Nation, State]. Lviv, Ukraine.

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## **INFLUENCE OF ENVIRONMENTAL RESPONSIBILITY OF MODERN BUSINESS ON THE ECONOMY OF A COUNTRY**

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### **Abstract.**

The article deals with the analysis of the influence of the environmental component of social responsibility of business. The content of the concept of “environmental responsibility” was defined; the external and internal threats that affect the implementation of the concept of environmental responsibility were listed. Competitive advantages of the environmental responsibility of business were enumerated. The modern level of environmental responsibility in Ukraine and in the world was analyzed through the analysis of the Environmental Sustainability Index. The ways of increasing environmental responsibility with the view to preventing a negative impact on the national economy were substantiated.

The subject of the research is the processes of regulation environmental responsibility of business considering with world and Ukrainian practices. A systematic analysis has been carried out that provides an opportunity to establish competitive advantages of the ecological responsibility of the business. Scientific novelty of the research is to find tools and mechanisms to reach an agreement between the parties concerned - business, government and society in the field of nature management and environmental protection. There is a need for further research on the concept of environmental responsibility of business, also due to the need to prevent the negative consequences of a rash attitude towards the environment.

**Keywords:** environmental responsibility, ecology, personnel, resources saving, waste minimization, recycling.

**JEL Classification:** E 240, E 690, M140, Q 200, Q 300

**Introduction.** The problem of nature management at the level of business is becoming increasingly acute nowadays, that is why the problems of environmental responsibility of business are becoming more relevant. This is associated with globalization, the increasing threat of technogenic and environmental disasters, depletion of natural resources, the negative effects of pollution, etc. Thus, generally accepted modern interpretations of such concepts as “gross national product” and “gross domestic product” do not consider these environmental problems. The important task is the search for the tools and mechanisms for reaching agreement between stakeholders – business, government and society in the sphere of nature management and environmental protection. The issues of the interaction between these stakeholders lie within the concept of social responsibility of business because of environmental responsibility is a part of it.

**Literature overview.** Modern-day researchers emphasize a special role of a decrease in material consumption of production, application of new technologies and “greening” of the economic activity in general. Environmental responsibility of business is the focus of research of a number of national and foreign scientists.

In spite of the considerable experience of scientific research in this area, in our view, the issue of environmental responsibility requires additional analysis in terms of its impact on the economy of a country. I. Gerasimchuk concludes that the fact that business uses the environmental policy as a tool of competition promotes the transition to a sustainable development of a country, since it contributes to upbringing and formation of ecological advantages in consumer (Gerasimchuk I., 2007).

Approaches to defining environmental responsibility greatly differ among scientists. Thus, according to the classical approach, environmental responsibility arose under the influence of environmental legislation: to avoid sanctions, businesses are forced to revise their environmental policy and take measures to reduce the negative impact of their activities on the environment (Grishnova O., Brintseva O., 2013).

According to the neoclassical approach, environmental responsibility is a consequence not only of regulatory and legal restrictions, but also the moral responsibility of manufacturers for inflicted damages (Holtbrugge D., Dogl C., 2012). These actions are beneficial to the environment (or reduce the negative impact of business on the environment), and go beyond what companies are required to do by law. Thus, the environmental activity of business includes both legitimate and voluntary kinds of the environmental activity.

**Aims.** The main purpose of this paper is to highlight the specific features of the influence on environmental responsibility of business, to reveal the state of the environmental sustainability of Ukraine and to provide the ways of the gradual enhancement of environmental responsibility of business.

**Methods.** Today, environmental responsibility of business is significant. However, it is not the determining aspect of the business strategies of modern enterprises. Therefore, there is a need for further exploration of the concept of environmental responsibility, which is also caused by the need to prevent the negative consequences of the careless attitude towards the environment.

The intensive use of natural resources, when renewable and nonrenewable resources are widely involved in production, is rapidly growing in the course of the industrial progress. Today, almost all countries of the world face the problem of environmental degradation and the need to prevent further development of this process. Human activity, including the activities of transnational corporations as the highest form of business organization, took the form of alien to nature flows of motion of matter, causing its chemical and thermal pollution, as well as mechanical conversion of natural objects. Intensive activity of enterprises led to a threat to the health of people and the many species of flora and fauna.

The back side of business is also depletion of those types of natural resources, which are used for industrial purposes. This is primarily due to increasing population and standard of living in the developed countries, which is provided by the growing volumes of consumption and production. Therefore, on the global scale, activities of companies and other entities are associated with the trend to continuous growth in processing natural resources.

And although the exploration of new deposits of energy resources, ores of ferrous and nonferrous metals and other minerals is going on, for many national and international companies

with the raw materials specialization, the issue of stocks replacement (accepting on an account the stocks of new deposits instead of depleted ones) is becoming increasingly urgent.

**Results.** We believe that in the general form the concept of environmental responsibility should imply the activity of each individual citizen, as well as business structures, which benefits the natural environment (or reduces the negative impact on the environment). In our opinion, environmental responsibility includes not only obligations of enterprises and business structures, but also people, more often the personal that make decisions and implement the action aimed at the protection and improvement of the state of the environment in general.

The concept of environmental responsibility of business should be divided into two parts: corporate and individual. Corporate environmental responsibility directs business structures to the necessity of existing of the global responsibility to the ecological system of the planet, and that means responsibility of each particular productive, as well as non-productive organization for the state of the environment.

Modern global tendencies prove the fact that the concept of individual environmental responsibility in the context of business is gaining in popularity (Derii V., Zosymenko I., 2016). The personnel is more interested in how the environmental component of the activity of business will influence their daily lives and the lives of others around them. In addition, they are concerned about how they can contribute to the solution of environmental problems. Thus, that is personnel that can affect a company and require environmental responsibility from it. This will influence the way the reputation of a company is formed. The reputation of a company is an important factor in competitiveness in the market. Thus, on the way to the sustainable development of its reputation, companies should also take into account the impact on the enterprise on the environment and implement environmental responsibility of business. Moreover, companies have to consider environmental protection and participation in these processes as competitive advantages, rather than additional costs or a delayed threat. Therefore, we will consider the threats that affect the activities of business in the sphere of ecology and benefits of the environmental responsibility of business.

Environmental safety of an enterprise is influenced by a range of external and internal threats. External (exogenous) threats are the threats of the influence on the activity of the enterprises in the field of ecology that is determined by the state and characteristics of the environment, in



which an enterprise operates. The action of external threats is unmanageable by an enterprise, and therefore it is necessary to take them into account during the decision-making process and to undertake targeted efforts to reduce their impact. These include: specific features of the natural resources of a particular country, a climate change, negative transformations of water resources and the biological system, environmental pollution, natural disasters and technogenic disasters and other threats.

Internal (endogenous) threats are the threats of the influence on the activity of enterprises in the field of ecology, formed mainly within an enterprise, i.e. to which organizations are directly related and can influence. The main threats include uneconomical use of resources and energy sources, the use of outdated equipment, high volumes of production wastes and emissions, violations of safety rules and technologies by personnel, and other threats.

The implementation of both external and internal threats reduces the capacities of enterprises to implement the concept of environmental responsibility (Ohorodnyk V., 2015). Thus, a particular mechanism for environmental responsibility, which should take into account the company size, field of activity, the level of development of corporative culture, should be created in every company. Therefore, we believe that to reduce the above threats, it is necessary to adhere to the following elements of environmental responsibility of business:

1. To implement a corporative environmental policy, which implies compliance with environmental legislation, open environmental policy, the system of ecological principles and standards.

2. To introduce the environmental audit, which will help to identify priority directions of the environmental policy of an organization, will involve the evaluation of the impact of the activity of an organization on the environment.

3. To involve personnel in environmental initiatives, i.e., a company should take into account the environmental responsibility of employees through the aspect of environmental ethics.

4. To control environmental friendliness of suppliers, which involves the use of ecologically safe raw materials and the materials produced by nature-saving technologies. The problem of the optimal use of resources and their conservation is very acute in the modern world. But due to the scientific and technical progress, it is possible to gradually eliminate the dependence of business

on natural resources through creating their synthetic substitutes (e.g., synthetic materials) or to implement recycling processes – reusing any resource after its processing, which makes it suitable for reuse (Dubovyi I., Dubovyi O., 2016). This allows eliminating the resource deficit, on which the pace of increase in the key sectors of economy depends.

5. To produce eco-friendly products, using ecologically pure materials for their manufacturing; to apply innovative technologies for waste recycling, using technologies of closed cycles, etc.

In addition, it is also necessary to focus attention on the issue of the benefits from the introduction of environmental responsibility of business. Therefore, the ecological safety of an enterprise should ensure not only preservation and improvement of the environment, and through this provide for high rates of extended reproduction of manufacturing, economic growth and welfare enhancement. That is why the competitive advantages from the environmental responsibility of business can not only be internal, but also transit to the area of external ones, see Fig. 1. (Ohorodnyk V., 2015; Smolennikov D., 2013).

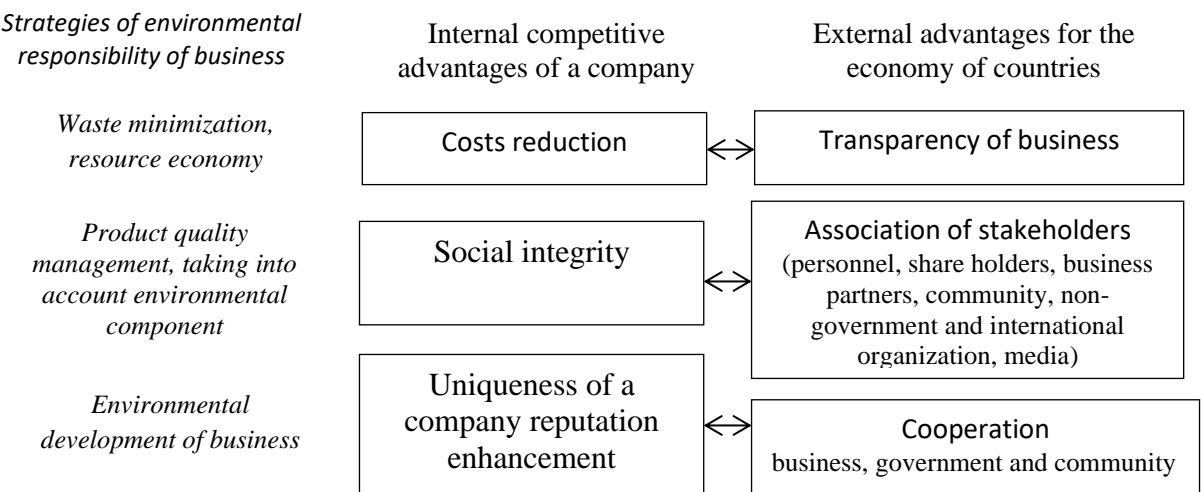


Fig. 1. Strategy of environmental responsibility of business and its competitive advantages

The basis for the strategy of “waste minimization and resource economy” involves reducing harmful emissions and wastes using the latest equipment and new methods of reducing pollution. This approach will result in costs reduction, which is a competitive advantage of business. This approach is directly linked to compliance with environmental commitments, including those

under the environmental legislation. From the point of view of society and economic activity, the transparency of business is increasing.

When applying the strategy “product quality management, taking into account the environmental component”, the competitive advantages of business will be the domination of the sales market. In this case, the opinion of potential consumers and other stakeholders, who should be included in the process of strategic management, will be important.

The introduction of environmental responsibility of business with the view to achieving sustainable development should become the strategic decision of each enterprise, its integral part that will influence both the internal business development, and the relationships between stakeholders, organizations and authorities. Thus, on the way to sustainable development, environmental responsibility must be not just an attribute that provides the appropriate image in the international arena or in the national market and preferences of consumers, additional competitive advantages, popularity, but also become a vital philosophy for all people, nations, governments, corporations and companies. In this case, a company gains long-term competitive advantages in the form of comprehensive cooperation (between business, the public and authorities) and technological cooperation. As a result, the organization obtains public reputation and the improved image, an increase in the value of intangible assets.

In addition, the state and the society get significant benefits from the introduction of environmental responsibility of business: the solution of a part of key environmental issues, conformity with the norms and standards of the world economy taking into account the environmental component, preserving the health of the population, etc. To research the environmental situation in Ukraine in general, we will use the ranking of the countries by the Environmental Sustainability Index, developed by the Center of environmental law and policy at Yale University (the United States). Thus, in 2016, Ukraine occupied the 44<sup>th</sup> position among 180 countries of the world (see Table 1). (Hau A. et al., 2016; Daniel C. et al., 2006).

Table 1

Ranking of countries by values of Environmental sustainability index in 2016

Ranking	Country	Value	Change in value of index in 2016 compared to 2006 (%)	Ranking	Country	Value	Change in value of index in 2016 compared to 2006 (%)
1.	Finland	90,68	+4,2	32.	the Russian Federation	83,52	+7,7
2.	Iceland	90,51	+10,2	35.	Belarus	82,3	– *
3.	Sweden	90,43	+3	38.	Poland	81,26	+6,6
4.	Denmark	89,21	+5,9	39.	Japan	80,59	-1,6
5.	Slovenia	88,91	+14,7	40.	Cyprus	80,24	+2,3
6.	Spain	88,91	+12,3	41.	Belgium	80,15	5,6
7.	Portugal	88,63	+6,9	42.	Costa Rica	80,03	-1,9
8.	Estonia	88,59	– *	43.	Argentina	79,84	+2,8
9.	Malta	88,48	– *	44.	Ukraine	79,69	+11,9
10.	France	88,2	+6,9	45.	Cuba	79,04	+5

\* data of 2006 are not available

Environmental Sustainability Index measures the achievements of the countries in the world in the field of ecology and effectiveness of management of natural resources, thus, in 2016, Finland ranked first, while Somalia ranked last. The data of Table 1 show that our state in the period from 2006 to 2016 improved the value of this index by 11.9%. For comparison: in 2006, Ukraine occupied the 51st place in the ranking with the Environmental Sustainability Index of 71.2.

**Discussion.** Modern national realities and the analysis of the components of the Environmental Sustainability Index suggest that in general there exists irresponsible attitude to the environment in our country both at the level of the state, and at the level of business.

**Conclusion.** In our view, it is necessary to pay attention to the fact that rich natural resources in Ukraine must be used both by business, and by the state in compliance with the following mandatory environmental requirements, which must become an integral part of the environmental responsibility of the Ukrainian business:

1. Environmental responsibility of business should become a component of the strategy of each company. Both personnel of an enterprise and members of their family, the state of the different organizations must be involved in it.
2. To follow the principle of resources saving and waste minimization: the rational and economical use of natural resources based on the active implementation of innovative technologies.

3. To undertake measures to prevent damage, pollution, depletion of natural resources, and the negative impact on the environment.

4. To apply biological, chemical methods of improving the quality of natural resources: to use synthetic materials and to implement recycling processes.

5. To carry out economic activity without violating environmental rights of other people.

Thus, strengthening the national environmental responsibility as the components of social responsibility of business can make a significant contribution to the solution of environmental problems and prevent possible conflicts in relations of business, society and authorities, acceptance of domestic commodity producers internationally.

Observance of the concept of environmental responsibility by business structures implies the following major benefits of improving the environmental situation: reducing the negative impact of the activity of a company on the environment; improvement of the environmental characteristics of the planet; active cooperation and enhancement of the relationships between stakeholders; improvement of health of the population, and additional benefits that include: an increase in the brand worth and formation of the positive reputation; an increase in sales, the possibility to expand the scope of sales; access to new sources of resources; costs reduction and increase in labor productivity.

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## **MAIN DIRECTIONS OF MARKETING ACTIVITIES IMPROVEMENT OF GRAIN PROCESSING ENTERPRISES IN THE CONDITIONS OF GLOBALIZATION**

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### **Abstract.**

The main function of marketing activities of any grain processing enterprise is to establish its communication with the current market environment in order to synchronize internal production capabilities with the needs of the end consumers. In order to sufficiently reveal the essence of this function, we suggest starting with the definition of the marketing concept that is most appropriate for use in the conditions of interaction of the participants of the grain subcomplex (both enterprises engaged in joint production of a certain value (namely, grain producers) and consumers (i.e. grain processors) who directly perceive such value. On the basis of generalized presentation of the marketing concepts evolution, it should be noted the need to use “the concept of marketing partnerships” or “interaction marketing concept” in the modern conditions of globalization and the growing dynamism of the business environment.

**Keywords:** grain processing, grain subcomplex, marketing concept, globalization processes, global market environment.

***Analysis of recent research and publications.*** In the process of justifying marketing activities, it should be borne in mind that globalization greatly affects the key parameters of the demand (and at the same time, its homogenization occurs) and supply (first of all, it means standardization of attributes and components of the proposed value). In this context, a slightly different observation, proposed by O.V. Dykiy (Dykiy, 2005) that the successful adaptation of the marketing mix to the changed conditions is subject to the level of enterprise integration during the implementation of globalization processes (the greater the integration is, the more standardized elements of the marketing mix should be used), is fully justified.

By the way, it is obvious that the organization of marketing activities should be differentiated depending on the parameters of market dynamics and the level of demonstration of the enterprise's leadership position in a certain segment of the global market (or the so-called target market in which globalization factors can occur).

The main limitation of the standardization of the marketing function is that the implementation of the developed strategic initiatives when going beyond the local market (beyond the country's market) occurs within the range of certain external factors (for instance, the influence of the distinctive features of the globalizing target market). Consequently, the target market should also be presented as a kind of dynamic and specific (unique) combination of the attractive factors (those that are shaping the consumer demand, which largely depend on the economic development parameters of a certain country). This unique combination of factors makes it possible to focus on the nonlinearity of the global market environment, and therefore the need to move to non-linear marketing management. According to the scientific works of Alekseyevskiy V.S., Holikov A.A., Popkov V.V. (Berg, Bolshakov, Goldstein, 2007) and other leading scholars-economists, nonlinearity can be described as the existence of various stationary states of the economic system, each of which is characterized by different sets of factors of influence and certain rules of behavior. Depending on the formulation of the problem, the global environment, or a specific target market can act as a holistic system.

The marketing management in this case consists in supporting by the enterprise of such a development trajectory that allows it to achieve sustainable competitive advantages in the target market (these advantages are expected to transform into a certain value for the consumer), the main parameters of which are characterized by multi-alternative and the presence of various



“future instances” (Amiri, 2016; Danylenko, Satyr, Shust O. 2017; Hauser, Dong, Ding, 2015; Knyazeva, Kurdyumov, 2002; Haken, 1991; Markina, Potapiuk 2014). The development and support of this trajectory is formed by making certain strategic decisions that, taking into account this nonlinearity, can range from effective to unsuccessful ones (here we are talking exclusively about the determination of the approach to marketing management, and not about the assessment of the quality of the proposed solutions). The constant change of power and the manifestation of the influence of environmental factors require cyclical and consistent decision-making process in the field of individual components of the marketing mix, which makes it advisable to talk about recurrent non-linear marketing management that can also be achieved through marketing interaction orientation.

Each of the existing marketing concepts assumes consideration of the company's presence in the market not in isolation, but within the whole complex of informational and material relationships with other market participants [Ashmarina, Zotova, 2016; **Cervenka, Hlavaty, Miklosik, Lipianska, 2016**; Homburg, 2016; Kovalev, 2008; Markina I. 2014). Accordingly, commodity producers should represent their activities in the form of an integrated set of actions for developing certain values and bringing them to the market. Consequently, according to the results of scientific research of Hunt S. (Morgan, Hunt, 1994), the essence of marketing activities can be transformed into activities for setting up and maintaining the relevance of the effective relationships between participants in the market exchange. It is this efficiency that forms the basis for the emergence of marketing interaction. Moreover, the point of view of Yu.M. Pustynnikova (Pustinnikova, 2005), concerning the transformation of the role of marketing from “marketing as a market conquest” to the “marketing as a market retention” (this is a matter of greater importance for the management system of the indicator of customer loyalty and counterparties, which enter into more active interaction, rather than the interaction of the indicator of market share and the number of consumers) deserves particular attention.

Since the globalization of the environment for most commodity producers largely unifies the indicated components of the marketing mix, the possibility of obtaining sustainable competitive advantages is leveled (the advantages are lost due to the increasing opportunities for competitors to attract the best practices of the enterprise's activity). Accordingly, the sustainability of the competitive advantage should be ensured by taking into account the individual characteristics and

the personalization of the offer to each loyal or already attracted consumer. Under these conditions, the basis for justifying marketing activities is an orientation toward the establishment of partnerships for each stage of establishing interaction with contractors and consumers as a whole.

Thus, the main purpose of diagnosing the effective ways to improve marketing of grain processing enterprises in the context of globalization is to determine the current status of the grain processing business and to identify the key trends of changes in this sphere in order to establish effective partnership relations and to ensure the sustainable development of the grain sector of the national agro-industrial complex.

**Objective statement of the paper.** The overall purpose of this paper is to put everyone in the picture about the main directions of marketing activities improvement of grain processing enterprises in the context of globalization.

**Presentation of the main material of the research.** In the system of agroindustrial complex, grain processing enterprises are considered to be the main consumers of grain products produced by agricultural enterprises. For this reason, the efficiency of the production process of grain processing enterprises will largely depend on the performance (quantitative and qualitative one) of grain supply enterprises. Therefore, the search for the object of management impact of the marketing system of a grain processing enterprise should begin with a study of the production mechanism of agricultural enterprises in order to identify the sources of the positive impact of their activities on the production cycle of a grain processing enterprise.

The main directions of the effective development of grain processing enterprises, which are dictated by market reality and dynamics, can be described by a bipolar system with the following multidirectional priorities: the priority of the production of ecologically safe, including organic, processed products with minimal artificial technological intervention in the “nature” of the product; the priority of producing products for the deep processing of grain by using the full potential of technological innovations in order to obtain scarce substances that are considered to be the main source of increasing the efficiency and competitiveness of food products production. *Further, we will consider this system in more detail.*

An important direction of changes in the modern grain products subcomplex of Ukraine is the

need for its greening. During the years of independence of Ukraine, the situation has developed ambiguously. On the one hand, 8 million hectares of relatively clean land (19% of farmland) remained, on which organic products can be grown, and Ukrainian soil has a very high natural fertility; mineral fertilizer application is 3 times less than the corresponding Western European standards. However, the desire to increase grain production at any cost, along with disruption of the crop-rotation process through the constant cultivation of the most export-oriented crops, can accelerate the processes of environmental degradation. While the situation in the Poltava region is somewhat better than in the whole country, however, violations of European standards are already observed. In particular, the share of grain and leguminous plants in the sown area exceeds 50% (the level, recommended by EU standards). The primary task, the solution of which is related to the area of joint interest of producers and processors of grain, is the formation of the grain quality management system.

The implementation of measures to reform and establish the seed industry and the seed market will contribute to the transfer of the grain product subcomplex to the innovative development path.

Today, without exception, all commercial varieties of baking wheat, zoned in Ukraine, are of the hard type, and the State Register of Plant Varieties has not yet had any zoned varieties with soft consistency, and Ukrainian confectioners do not even know about the existence of wheat flour type soft. The implementation of the program of selection of Ukrainian varieties of wheat in the confectionery direction will allow the production of special flour for the production of high-quality biscuits, cakes, cookies, crackers, gingerbread and other flour sweets, thereby contributing to the further development of the food sub-branch of the grain subcomplex.

The State Register of Plant Varieties suitable for dissemination in Ukraine includes 828 varieties belonging to 17 species, including 134 winter soft varieties and 12 durum wheat varieties, 39 spring wheat, 35 triticale, 104 barley, 15 oats varieties, 46 peas, 320 maize, 19 buckwheat, 18 millet, 17 sorghum and 10 rice varieties. Therefore, for the optimal choice of varieties and hybrids of a certain agriculture crop, it is necessary to make maximum use of the services of numerous research institutions located in the region, regional state centers of plant variety examination and sorting stations, consulting services of regional departments of agro-industrial development (as they are created).

The improvement of the quality of grain is inextricably linked with the introduction of organizational measures aimed at a qualitative increase in the technical level of grain production through the use of modern devices and methods for determining the quality indicators of grain, as well as the increase of the requirements for storing grain products at grain receiving and grain processing enterprises, and further improvement of the regulatory and technical documentation. In this regard, it is necessary to fully support the introduction of licensing activities for receiving, storing, processing and marketing of grain and its products. At the same time, it is expedient to create an industry-wide information and communication network to regulate the procurement and purchase of grain, the production of flour, cereals, and bread.

All factors influencing the quality of grain products can be divided into two main groups: factors of the internal and the external environment. In our opinion, in the process of substantiating the system of factors for improving product quality as a whole, it is recommended to focus on the internal environment factors that can be considered from the point of view of their influence on the production technology of high-quality grain and from the point of view of their influence on the reproduction process of the existing organizational and economic mechanism. The quality management process depends on the functioning of the quality management system.

Thus, when justifying the marketing policy of grain processing enterprises, it is necessary to formulate a quality policy as follows. All stages of the creation of products should be considered properly in it. Therefore, the main objects of quality control of grain, as the target segment of marketing management, are the processes able to transform the initial resources for the final results (both production and technological processes); grain products and grain processing products as the final result of the enterprise activity; staff represented by the individual performers and individual structural units, which perform certain functions in the quality management system.

According to the information provided, it can be judged that the stable functioning of a grain processing enterprise in the mode of producer of high-quality products, as well as environmentally safe ones will largely depend on the compliance of the raw materials with the environmental quality parameters, which are currently poorly controlled due to the lack of mechanisms of influence of the grain processing enterprise on the existing production technology.

Modern opportunities for quality control of raw materials are limited only by monitoring the performance of agricultural enterprises in the mode “meets or does not match one or more specified conditions”. Such a situation significantly limits grain processing enterprises in the formation of a high-quality raw material base and forms a special relevance of the concept of “marketing partnerships” in establishing effective relations with agricultural enterprises supplying raw grains. Therefore, the marketing procurement management system with an active action is an extremely relevant mechanism for the organic grain processing sector in the conditions of the establishment of the organic agricultural production (grain). In this case, grain processing enterprises as the main producers of organic products can become a “locomotive” of the organic development of agricultural enterprises at the regional level.

In the past few years, due to the prevailing difficult circumstances and adverse weather conditions, agricultural producers in the world have not had the opportunity to pay attention to cultivating the land (to provide the necessary amount of fertilizers and herbicides). This led to the fact that the quality of the obtained grain in terms of gluten content has decreased markedly, and consequently, the quality of flour has also decreased. This situation can be remedied by injecting dry wheat gluten. In the food industry, the most important issues are maintaining the constant quality and nutritional value of products. These issues are solved not only by the standardization of the main raw material, but also by the use of various additional components, primarily of plant origin. One of these components is dry wheat gluten (wheat gluten), that is, a product of deep processing of grain.

Projects of deep processing of grain are innovative for the Ukrainian economy, therefore, the study of the effective economic prerequisites for the introduction of grain-processing innovations should be viewed through the prism of an investment project.

Deep processing of grain, which provides for the isolation and further use of its components, has long been a major global industry.

For many foreign countries, deep processing of grain is an established industry that brings stable high incomes. The largest manufacturers of such products are traditionally the United States, as well as the EU countries. Today in the EU countries there are 78 factories engaged in deep processing of grain, while production facilities are located in 21 countries.

In the USA, there are only 21 enterprises of such type, but the average American plant is almost eight times higher than the European one and gains significant competitive advantages due to the low cost of energy and raw materials (on average, this indicator is seven times lower than in other countries), since genetically modified corn is widely used in this country. At the same time, unlike in Ukraine, in the EU and in USA, the peak in the volume of construction of new capacities has already passed, which is connected with the relative saturation of the market.

For example, BioWanze is the largest producer of bioethanol in Belgium with an annual production of up to 300 thousand cubic meters of products. The company implements an innovative production process, ensuring a reduction in greenhouse gas emissions by up to 70% compared with traditional fuels. The end products are high quality food products and additives used in the feeding of farm animals. The annual consumption of raw materials has reached 800 thousand tons of wheat and 400 thousand tons of sugar beet.

In China, there is also a significant increase in production capacity for deep processing of corn. Production of corn starch as the main product of the industry shows a very rapid annual growth. So, in 2012, corn starch production in China has reached 21.2 million tons, which is 26% higher than in 2008, and much higher than the production of corn grain. The production of corn deep processing products is represented by starch products, alcohols, glutamic acid, lysine, citric acid. In addition, corn oil and polyol production has been launched. The Chinese government controls the production of alcohols, glutamate soda and citric acid and supports the development and sales markets for enterprises producing amino acids, polyols and functional fermented products.

For the period of 2008-2013, gross margin of enterprises for deep processing of grain was at the level of 10%, however, the share of value added in the products of deep processing was inferior to imported counterparts. Against this background, Chinese enterprises carried out a series of actions to develop the deep processing of grain.

Thus, the production of starch, which was transformed into the production of modified starch, stimulated the growth of income from the deep processing of grain from 0.6% to 6.7% only in 2012-2013. It is expected that the operating income of Chinese enterprises from the deep processing of grain will grow with the expansion of the product line and the improvement of processing technologies.

One of the examples of a successful enterprise for the development of deep processing of grain in China is Xiwang Sugar Holdings Company LTD. This business entity was founded in 1986, as a cooperative enterprise. During its existence, the company has become a leading processor of corn grain, when developing the production of high added value starch products.

The processing plant has a strategic location in one of the main grain regions of the country. This gives the company a competitive advantage in the logistics of grain raw materials. Small farmers own a land area of no more than 0.5 hectares. From May to October, natural corn-free, non-GMO components are produced. For the rest of this season, wheat is produced, which diversifies production and provides additional income.

Xiwang buys more than 1 million tons of corn annually at market prices from 400 thousand small farmers through the implementation of two procurement directions. First of all, about 50% of the total annual volume of corn comes directly from small farmers in the region where the company's processing plant is located. Despite the fact that Xiwang is not the largest processor of agricultural products in the region, small farmers choose the plant as the main sales channel for grain due to the possibility to sell a large amount of grain. Xiwang's large volumes of purchases are achieved through the possession of sufficient grain storage capacities in order to control the purchase price and supply balance. At any time, the company has sufficient volumes of corn to ensure a production cycle of several months. The ability of Xiwang to purchase significant amounts of corn gives farmers the stability in ensuring the sale of their crop.

Secondly, in order to ensure a stable supply of corn, the company interacts with 20 grain elevators, which buy corn from small farmers for its further resale to processors. The company enters into contracts with elevators, setting the level of purchase prices based on the balance of supply and demand. This allows all farmers, regardless of their location, to have an access to the sales channels of grain processors.

For Ukraine, this is a relatively new direction, which has a significant potential for further rapid development. The undoubted attractiveness of this project is the need, and as a result, guaranteed sales of finished products in Europe, China and other countries. The technology of deep processing of wheat grain involves the production of a wide range of high-quality marketable products, waste-free, compliance with the standards of environmental safety of production.

The main task of the deep processing of grain is to isolate and effectively use the components of grain. As a result, starch, gluten and other by-products are released. For Ukraine, deep processing of grain raw materials is a relatively new area, which has real prospects to become an independent part of the grain subcomplex.

One of the main competitive advantages of enterprises of the deep grain processing industry is the ability to regulate the production volumes at various stages, which allows to adapt the production process to current market requirements and, as a result, to increase economic efficiency significantly. In the process of deep processing of grain, it is possible to obtain a wide range of products with a high proportion of value added: native and modified starch, glucose, glucose-fructose syrups, sweeteners, gluten, organic foods, organic and amino acids, vitamins, and even bioethanol.

Today, the production of products of deep processing of grain in Ukraine is underdeveloped. Most of them are imported from China and Europe. Obviously, deep processing of corn grain in Ukraine will allow satisfying the market with products of its own production, abandoning their import and even starting export. The growth of corn production will ensure relatively cheap raw materials and competitiveness of final products with similar products from China, Europe and the USA. These countries will not be able to provide price competition or dumping without harming the nutrition of the population, due to the lack of fertile land.

As a sample, we propose to calculate and study the financial and economic parameters of the investment project on the example of the “GESS GROUP”, related with the construction of the plant for deep processing of corn for gluten, glucose-fructose syrup, starch and feed additive, with a processing capacity of 500 tons of corn per day. The baseline scenario involves the construction of a biotechnological complex for the processing of corn with the following product range:

- corn germ – 7800 tons;
- gluten – 9166 tons;
- starch – 37333 tons;
- syrup – 80000 tons;
- feed product – 25375 tons;
- corn oil – 7200 tons.



The project initiator intends to invest own funds of EUR 26.9 million to finance capital investments. It is assumed that the existing need for money, which cannot be financed by cash flows generated by the project, will be financed 100% by borrowed funds. Crediting will be carried out by a credit line in the amount of EUR 54.452 million. The estimated loan rate would be 12% per year, the loan currency is euro. Full repayment of credit lines occurs within 3.5 years from the date of launch of the grain processing plant.

The total cash flow for the project period is presented in Figure 1.

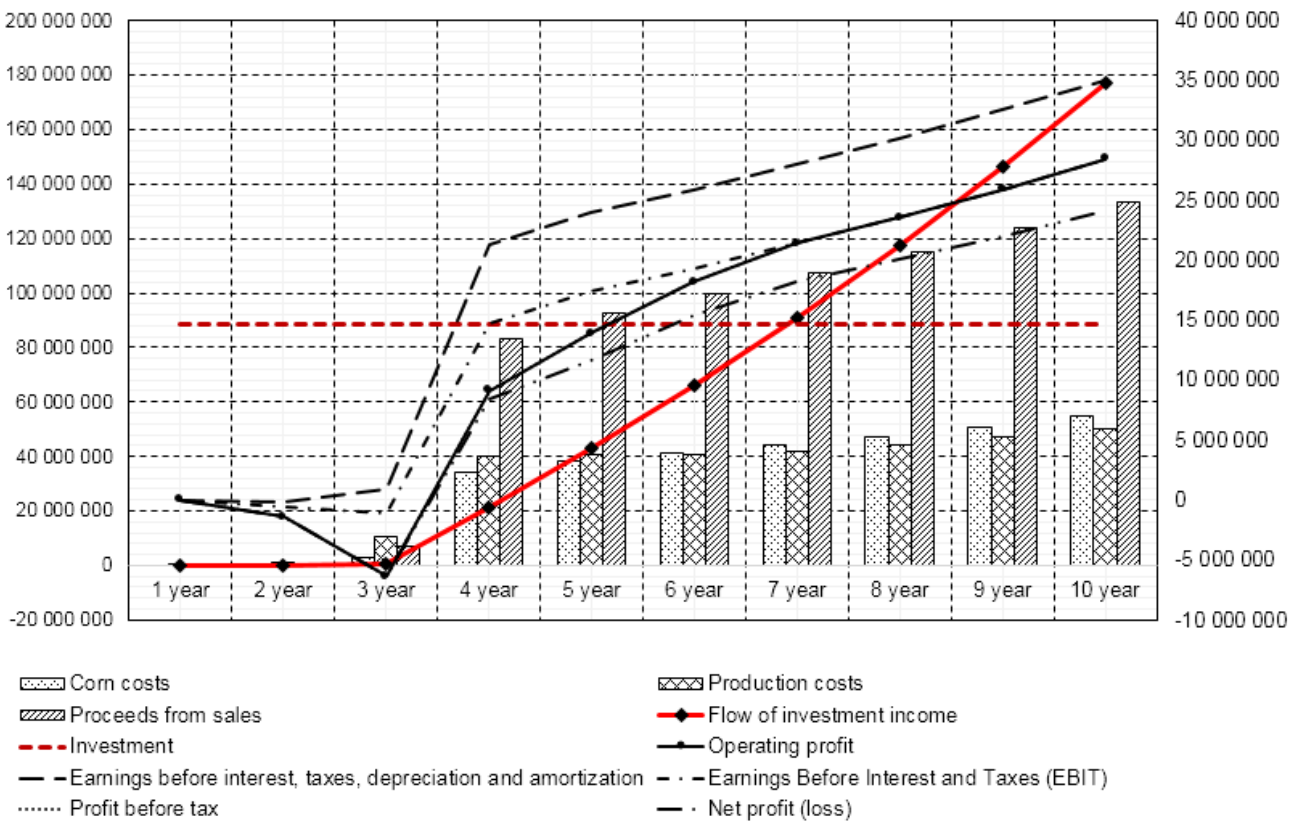


Figure 1. Economic parameters of the project for the establishment of a corn grain deep processing plant

Generalized indicators of the economic efficiency of the investments requested for the implementation of the project, are able to form the corresponding financial flows and the effectiveness of investments (See Table 1).

Table 1  
Indicators of the effectiveness of the investment project to construct a plant for deep

processing of corn grain

Indicators	Values of indicators
Investment amount, million Euro	88,338
Own funds, million Euro	26,900
Funds raised, million Euro	61,438
The accepted discount rate, %	7,00%
The simple payback period, years	6,96
Discounted payback period, years	8,81
Average rate of return,%	20,04
Net present value, million Euro	21,024
The discounted yield index	1,24
Internal rate of return,%	10,364

The lack of cash flows in the first two years is primarily due to the need to complete construction work and to create production facilities.

If the project is financed in the amount of EUR 88.338 million, the NPV indicator for the billing period (10 years) will be EUR 21.024 million, which is a criterion of the economic feasibility of the project. After the sixth year of the project (in all subsequent years) net economic benefits will be obtained. The internal rate of return (IRR) of the project will reach 10.364%. The return on investment of the project will be 20.04%, which also indicates a sufficient return on investment. Investment efficiency will reach 124%. The payback period of the project from the date of commissioning will be 6.96 of the reporting period, that is, approximately 7 years (6 years and 11 months). Taking into account the discounting, the payback period is 8.81 years, that is, the project costs, taking into account the change in the value of money over time, will pay off in the 9th year only.

An economic risk analysis of a project to create production facilities for deep processing of grain is of considerable interest to justify marketing activities.

The main factors that could potentially worsen the financial performance of the project are the following ones:

- decrease in revenue (price reduction for products and / or production volumes);
- increase in prices for raw materials, i.e. corn grain.

Analysis of the price level indicates that the project has a sufficient margin of safety (See Figure 2).

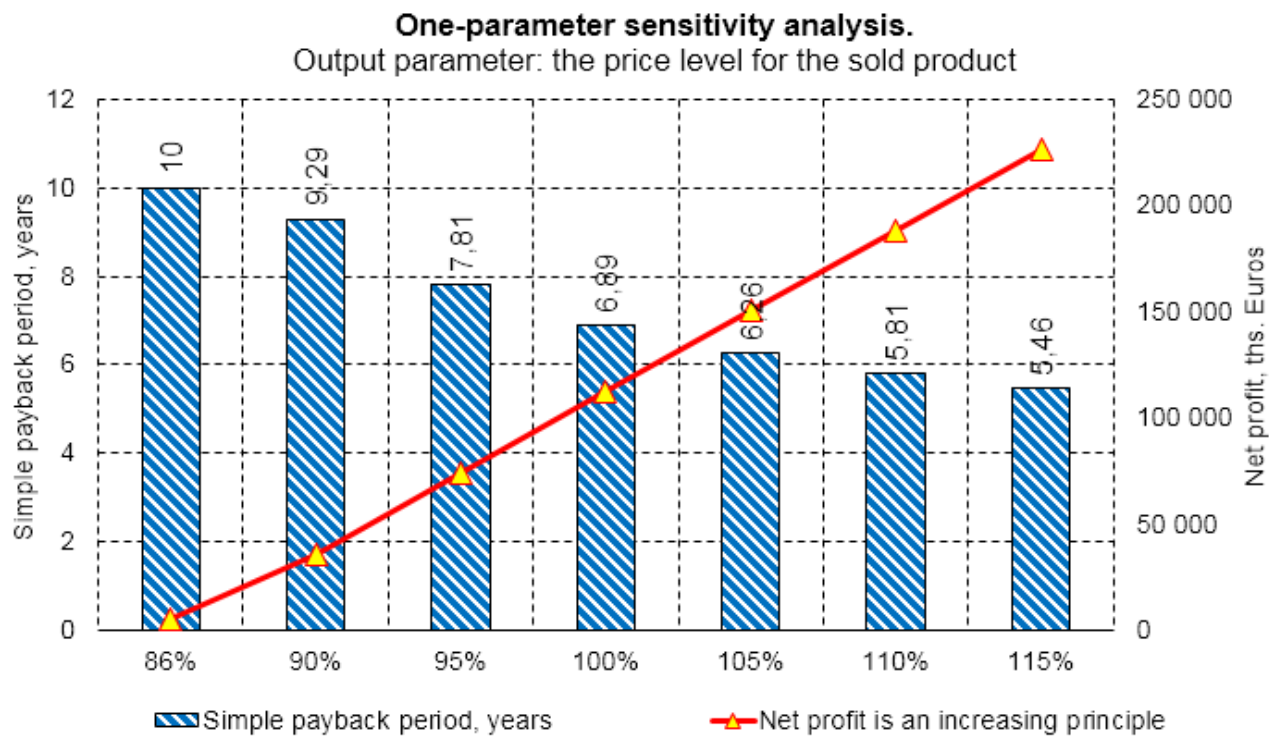


Figure 2. One-parameter sensitivity analysis by the price parameter for the prices for products that are sold

If prices fall by 10%, the simple payback period does not exceed 10 years, and the net profit is at the level of 40 million Euro. Increasing the cost of products for the deep processing of grain by 15% at planned production volumes will double the accumulated net income over the life of the project.

Analysis of the level of expenditures on the formation of the resource base also indicates that the project has an adequate margin of safety.

Reducing the price of raw materials by 10% will reduce the simple payback period by one year, and the net profit will reach EUR 170 million. The increase in the cost of purchasing raw grain due to an increase in prices by 20% at planned production volumes will lead to an increase in the payback period by 2 years and a decrease in accumulated net profit by 56% more than the planned level (See Figure 3).

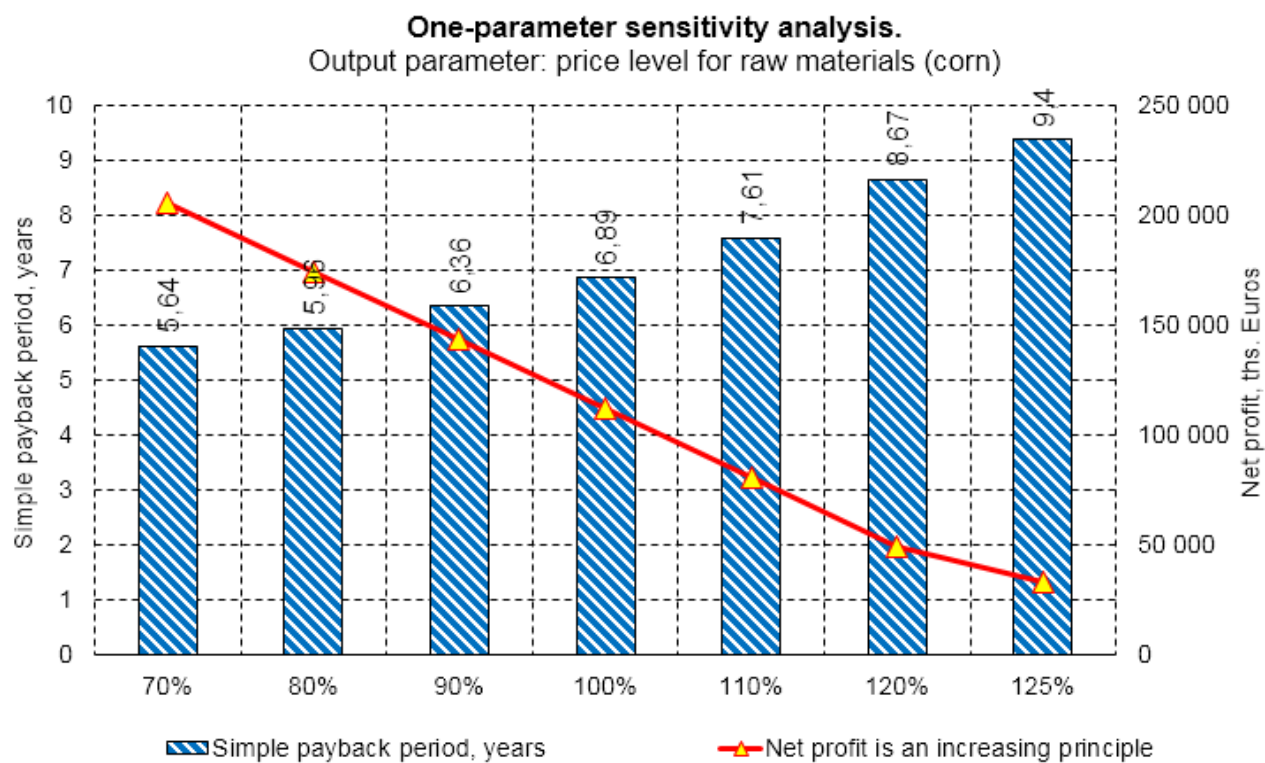


Figure 3. One-Parameter Sensitivity Analysis by Raw Grain Price Parameters

According to the data obtained, it can be judged that a change in the price offers of suppliers of raw grains will have no less risk for the project, compared with changes in the price of demand for finished products. Also, it is obvious that the discrepancy between quality of the raw grain will significantly affect the efficiency of the technological process and the economy of the investment project. For example, physical and mechanical deficiencies of grain can increase the amount of off-standard at the stage of preparation of raw materials, thus causing the need to increase the supply of grain to ensure full equipment loading, which will increase the budget for the purchase of raw materials. This in turn will reduce the financial flows of the project and delay its payback time. It should be noted that according to project calculations, the share of expenses for the purchase of raw materials is about 50%, which is very significant for the annual budget of the project.

**Conclusions.** Thus, the cost and quality of raw materials that affect the volume of purchases, sufficient to load the production capacity of grain processing enterprises, are equally influential parameters that determine the overall effectiveness of projects. Considering the mainly attracted sources of financing for projects of new processing enterprises and the re-equipment of the existing ones with the obligatory use of mainly imported equipment, the overall impact of the raw material supply policy is enormous. Additionally, grain processing enterprises have insignificant

opportunities to influence the finished product market, but there is a significant potential for optimizing the work of agricultural producers in the context of achieving grain processing objectives. Therefore, the main task of effective marketing in the system of grain processing enterprises introducing technologies for the deep processing of grain is to establish conditions for the supply of raw materials of the required volume and quality, and in terms of price parameters, minimizing the risks of investment projects for the development of production facilities for deep processing of grain.

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## FORECASTING OF GENERAL SECONDARY EDUCATION'S CONTENT DEVELOPMENT

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### **Abstract.**

The article deals with the problem of forecasting the development of the content of general secondary education; the notion of "forecasting the development of the content of general secondary education" is defined; in the context of the study the significance of educational and pedagogical forecasting for the specified process was grounded. The main groups of factors of the forecast background of general secondary education development are analyzed briefly. Prospects for further research are outlined.

**Keywords:** educational and pedagogical forecasting; forecast background; content of general secondary education; development.

**INTRODUCTION, PROBLEM STATEMENT.** Since the beginning of the formation of pedagogical science, the content of education (and the related content of training) have always been in the focus of attention of researchers. Scientific and technological progress, the introduction of the latest information technologies form, on the one hand, complex requirements for the organization of the content of modern education, and on the other hand - contribute to the formation of a new didactic paradigm, the introduction of new means of its design. Educational and pedagogical forecasting is one of the most promising tools of logical, scientifically

substantiated formation of the content of education in modern conditions. Significantly its superiority over others is the possibility of constructing the content of education with a prominent reflection of the social request for education in accordance with social and scientific achievements.

The reform of the education system in Ukraine actualizes the problem of development of the content of general secondary education, creates prospects for the use of educational and pedagogical forecasting in the process of its solution. The task of theoretical substantiation and scientific and methodological provision of prediction of the development of the content of general secondary education arises. The analysis of the forecast background for the development of the content of general secondary education is one of the most important prerequisites for successful solution of this problem..

**LITERATURE REVIEW.** The works of many scholars are devoted to the problems of development of the content of general secondary education. General pedagogical and historical aspects of the researched problem are considered in the works of T. Litnev (periodization of the history of development of the content of general secondary education (30th years of the 20th century - the beginning of the 21st century), L. Pirozhenko (reforming the content of general secondary education in the middle of the 20th century. ), O. Savchenko (contents of school education at the end of the XXth - beginning of the XXI century), I. Strazhnikova (evolution of theoretical foundations of the content of education), O. Sukhomlinska (historical aspects of development of the content of general secondary education), etc.

Theoretical fundamentals of development of the content of domestic general secondary education were researched by V. Areshonkov (development of theoretical bases of the content of secondary education in domestic pedagogy in the twentieth century), S. Bushuev (theoretical principles of project management of development of the content of education), S. Goncharenko, Yu. Malovany (humanization of content of general secondary education), V. Ilchenko (modernization of content of general secondary education), V. Kamyshyn (modernization of the content of general secondary education aimed at development of gifted children), O. Savchenko (development of content of elementary education) and others.

Development of the content of general secondary education abroad became the object of study by Y. Zagrebenyuk (trends in development of the content of education in public schools in the



USA), O. Lokshina (trends in the content of school education in the European Union countries), O. Mozoleva (development of the content of education in the field of physical culture and sports in Poland), N. Shaverun (content of foreign language education in Polish schools), etc.

Development of the content of education is the subject of studies of V. Bugria (school native land education), V. Kushnir (mathematical education), T. Machachi (school technological education), N. Sosnitsky (school physical education) and others.

The theoretical positions that are important for the formation of a system of forecasting the development of the content of general secondary education have been considered in the studies of Y. Babansky, N. Bibik, V. Bondar, B. Gershunsky, V. Zagvyazinsky, E. Kostyushkin, V. Kremeny, O. Lokshina, L. Onyshchuk, I. Podlasogo, O. Savchenko, M. Skatkin, O. Sukhomlynska, O. Topuzov, E. Toffler, T. Huseen and others. However, the forecasting of the development of the content of general secondary education has not yet become the subject of a holistic theoretical study. In view of this, the chosen research problem is relevant to the theory and practice of forecasting the development of the content of general secondary education.

**The purpose of the article** is to select and substantiate the components of the forecast background of development of the content of general secondary education.

**MAIN RESULTS.** In the "Great Explanatory Dictionary of the Ukrainian Language" the notion "development" is defined as "a process that results in a change of the quality of something, the transition from one qualitative state to another, higher one" [2, p. 1235]. Processal, dynamic character is a generic feature of this concept, but the change of quality, the transition to another qualitative state of its object – is a species feature.

The content of general secondary education is considered as "a reflection of all elements of the social experience of mankind" [10, p. 60], "the system of scientific knowledge about nature, society, human thinking, practical skills and abilities and methods of activity, experience of creative activity, philosophical, moral, aesthetic ideas and behavior, which must be mastered by the student in the process of learning" [3, p. 137], "one of the components of the learning process" [6, p. 366], "the system of scientific knowledge, skills and abilities, the mastery of which provides a comprehensive development of mental and physical abilities of schoolchildren, the formation of their world outlook, morals and behavior, preparation for social life, for work"

[6, p. 366], "the system of knowledge about the world around us, modern production, culture and art, generalized intellectual and practical skills, skills of creative solution of practical and theoretical problems, as well as ethical norms, which must be mastered by students" [1, p. 53], etc..

Taking into account mentioned above, it should be noted that the adoption of the new Law of Ukraine "On Education" establishes a competently oriented concept of the content of general secondary education since the educational process is considered as "a system of scientific, methodological and pedagogical measures aimed at the development of personality through the formation and application of its competencies" . The law defines the concept of "competence", which is interpreted as "a dynamic combination of knowledge, skills, ways of thinking, views, values, other personality traits, which determines the ability of a person to socialize successfully , carry out professional and / or further educational activities." The law states that "the purpose of complete secondary education is the comprehensive development, upbringing and socialization of the individual capability of living in a society and civilized interaction with nature, has a desire for self-improvement and life-long learning, is ready for a conscious life choice and self-realization, responsibility, work and social activity ", and" achievement of this goal is provided by forming the key competencies necessary for every modern person to succeed in life ". The list of the most important key competencies is also established by law. [5]

Different aspects of creating the content of general secondary education are indicated in scientific pedagogical literature as "selection", "formation", "design", "modernization", "development". In our opinion, the concept of "development of the content of education" is the most extensive. According to the results of the analysis of scientific and pedagogical literature, one can give a definition of "development of the content of general secondary education" that it is a process of its quantitative and qualitative changes, which occurs under the influence of internal and external factors, ensures the achievement of a qualitatively new state of the system, its compliance with public inquiries and the personal needs of educators at a certain stage of social development.

Considering the fact that the content of education is a didactically elaborated reflection of the best social experience of mankind, the main problem of development of the content of general secondary education is to achieve an optimal balance between its components, the choice of

which is conditioned by the need of realization of social and personal inquiries; ensuring the transfer of the applicant's both theoretical (knowledge) and practical (skills and abilities) to the experience of mankind; taking into account the actual state (the experience of solving the problems of the present) and outright reflection (potential experience of solving problems of the future) of development of this experience.

Under this circumstance, development of the content of general secondary education can not be reduced only to the quantitative increase (growth) of the volume of knowledge, skills, etc. It will take place when quantitative changes will result in new quality, higher quality state of the content of general secondary education, its correspondence to the demands of a society and people. In this context, it is appropriate to note that the process of developing the content of general secondary education is influenced by a group of factors, namely [7, p. 317-320; 10, p. 69 - 70]: the objectives of the state educational policy, strategies for development of general secondary education, enshrined in normative legal acts of varying legal force; achievements of scientific and technological progress (the latest scientific knowledge, technology); social and personal needs; development of didactics and subject methods; internal opportunities of the system of general secondary education, etc.

Forecasting the development of general secondary education implies the mandatory determination of the above external factors (predictive background) of the object that are "the aggregate of external objects in relation to the prediction of conditions essential for solving the forecast problem". In pedagogical science, "the forecast background is divided into scientific and technical, economic, sociological, socio-cultural, organizational-political, international". [9, c. 17]

Let's consider the influence of each of these components of the predictive background on the development of the content of general secondary education.

Political-legal (organizational and political) factors play decisive role in selection of educational content at the present stage. With a help of these factors a certain model of general secondary education is fixed in legal documents as regulatory (requirements for the content of education in the new Law of Ukraine "About Education", State standards of education, Concept of "New Ukrainian school", etc.). However, political and legal factors in the development of general secondary education (state education policy, adopting regulations (regulation), regulatory

activities of the executive power, etc.) are mediated by scientific and technical (proposals of scientists) factors.

The idea of the decisive influence of scientific and technological progress on modern society, the acceleration of the changes taking place in it, has become universally accepted. A person of educational activity is aware that the scientific and technological progress puts forward new requirements to the content of general secondary education, which grow year by year.

The volume of scientific information received by scientists, carrying out fundamental and applied scientific researches, is growing rapidly (in some sciences the amount of scientific knowledge doubles and even triples in several years). The growth of scientific knowledge in geometric progression challenges subject methods, designed to ensure the mastery by students of fundamentals of science. The situation with regard to the selection of content for training courses designed to ensure that students acquire different types of practical activity is almost the same. The development of technology due to scientific discoveries is just as fast. For example, some computer models and software versions may become obsolete in the process of disclosure and implementation. In addition, topical knowledge and well-known ways of business lose their value in comparison to innovative ways which guarantee their owner competitive advantages in relation to certain activities on labor market, etc. Consequently, the question arises ahead of the requirements of scientific and technological progress in the content of education, in particular, in general secondary education. Solving these problems requires reliable theoretical and methodological principles, modern scientific and methodical tools for constructing the content of general secondary education.

The present stage of development of pedagogical science and educational practice, in our opinion, posed the issue of creating a modern theory of organization of the content of education. This issue becomes particularly acute in the context of the reform of the domestic system of general secondary education, the introduction of the Concept of "New Ukrainian School", one of the most important directions of which is "new standards and learning outcomes" [8].

The most famous in the twentieth century theories of organization of the content of education (didactic materialism, didactic formalism, didactic pragmatism, utilitarianism, etc.) were fairly criticized for the failure to systematically solve the problem, the incomplete correspondence of the results obtained (the resulting content) to demands of society. On the other hand, the

individual provisions of many of them have not lost value, they are still productive and successfully applied in modern educational practice.

The analysis of scientific and pedagogical literature makes it possible to identify the most essential requirements on the basis of which knowledge will be selected and included into invariant component of the content of general secondary education, namely:

1. Fundamental, systematic character of knowledge, which will form the content of education. The process of mastering such knowledge should provide significant educational results, namely:

- developed conceptual (verbal-logical, abstract) student thinking, associated vocabulary and thesaurus (circle of knowledge and cognitive interests);
- formation of the world picture according to the didactically worked out principles of science (the system of the most important knowledge about nature, society, person, thinking, etc.);
- formation of a cognitive component of key competencies, subject competencies of education providers, etc..

2. Personality-developing potential of certain knowledge, its significance for the formation of personal qualities, optimal physical, psychological, moral-spiritual and social development within and outside the school. This requirement is the most complicated and most controversial since any scientific knowledge can contribute to a student's mental development. Thus, the learning of certain textbooks in most cases will contribute to the development of memory, but specific "learnt by heart" knowledge may never be used by a pupil.

3. Knowledge as an integral part of modern educational content must be integrated. It is about the allocation of concentrates (categories, problems, methods of activity, etc.), which will integrate the knowledge of different sciences, thereby reducing the amount of knowledge (teaching material), and the quality of education will not change [7, p. 324]. It is worth noting that the realization of this requirement generates the need to escape from the substantive structure of the content of education (the subject as didactically based foundations of a certain science).

4. Ensuring the prognostic nature of knowledge, which should correspond not only to the

actual picture of the world (to reflect the achievements and problems of modern society, science, technology, etc.), but also to show the scenarios for their future development, will prepare the applicant for education. Such forms of scientific knowledge as a scientific hypothesis, scientifically grounded prognosis, a trend, etc., as well as knowledge of the theory and technology of forecasting in the respective spheres of public life will become more important for the content of the general secondary education of the future.

5. Observance of communication of knowledge which will become an integral part of the content of education, will open a possibility of practical application of them for solving daily life problems. This requirement should become not only a criterion for selecting the content of education, but also a part of the content of learning, embodied in the organization and implementation of this process. The fact is that fundamental knowledge, which is not supported by applied knowledge of the ways of its further knowledge and transformation, are not connected with daily (or creative) activity, do not cause an emotional attitude, get an "abstract-classroom" character and are more likely to be forgotten as unnecessary.

According to the mentioned above, one can propose the following sequence of selection of knowledge to the content of general secondary education: knowledge must be fundamental; it is necessary to highlight those with the most important personality development and potential (significant for solving life problems), prognostic nature; highlighted knowledge should be integrated.

The solution to this problem will be significantly promoted by informatization of the process of designing the content of education, which greatly facilitates, accelerates and reduces the cost of this process due to the use of modern information and communication technologies and information technology.

The above requirements may seem complicated. However, the traditional historical way of forming the content of education, which is an alternative to them, can no longer fully ensure the development of the content of general secondary education.

Another important component of the forecast background for development of the content of general secondary education is economic. Economic factors in the development of the content of education are traditionally associated with higher education. However, the content of modern

general secondary education is also under their influence. The new Law of Ukraine "About Education" refers to the competence of selection of the content of general secondary education, and the formation of a competent educational approach has become a reaction of European educators on the requirements of employers to prepare graduates of schools. The envisaged by the law deepening of its profile character and the allocation of "market-oriented labor" vocational guidance of secondary education (10-12 grades), which provides "the combination of the content of education, defined by the standard of secondary education and a career guidance approach to learning, taking into account the abilities and the needs of students "[5] are also due to economic factors.

Socially (socio-economic) and socio-cultural factors of development of the content of general secondary education, whose role in the future will grow, are closely linked with economic ones. In modern, information society, the level of education of a person determines the position, income, social status. As high-quality general secondary education determines the possibility of obtaining higher education, employment, its importance is increasing. We are witnessing the gradual "crystallisation" of the public request for the content and quality of general secondary education. The example is the attention that students and their parents pay to the studying of subjects that will be subject of external independent assessment and foreign languages, computer science, etc. Formation of such a request testifies to the important socio-cultural tendency - the majority of the population considers qualitative general secondary education not as a life-time, which needs to be done or vice a versa, as a self-value, a fetish, but is consciously understood as a mean of achieving the vital and social success.

International factors of the forecast background of development of the content of general secondary education cover the measures of international and interstate cooperation of Ukraine in the sphere of general secondary education connected with international programs and projects, scientific and educational exchange in the field of formation and implementation of the content of general secondary education.

**CONCLUSIONS/PROSPECTS FOR FURTHER RESEARCH.** The content of general secondary education is didactically developed best practice of mankind which traditionally includes knowledge, skills and abilities, methods of activity, experience of creative activity, etc. The current stage of reforming the domestic education system necessitates the development of the

content of general secondary education.

Development of the content of general secondary education is a process of quantitative and qualitative changes that take place under the influence of internal and external factors, ensure the achievement of a qualitatively new state of the system, its compliance with social and personal needs of educational attainments at a certain stage of social development.

A powerful scientific tool for developing the content of education is its educational and pedagogical forecasting which makes it possible to identify and assess its trends, develop and justify forecasts, provide recommendations for its selection and design.

Forecasting the development of the content of general secondary education involves determination of its predictive background (external conditions and factors that affect it). Traditionally, the component composition of the forecast background includes scientific, technical, economic, sociological, socio-cultural, organizational-political, and international factors.

The analysis of the forecast background of development of the content of general secondary education gives grounds to assert that in the conditions of reforming general secondary education the weight of organizational-political (state educational policy), economic (labor market, development of information sphere, labor migration, etc.), international factors (international educational cooperation) increases. Traditionally, the influence of scientific and technological factors, caused by scientific and technological progress (at the present stage it is the development of computer technology and information and communication technologies, etc.) remains.

Prospects for further research are connected with the refinement of the terminology system and the substantiation of the conceptual foundations for forecasting the development of the content of general secondary education, the development of the theoretical model and technology that ensure the implementation of this process.

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## **TEACHERS' SCIENTIFIC RESEARCH WORK AS A BASIS FOR FORMATION OF A TUTOR TRAINING SYSTEM IN A HIGHER EDUCATIONAL INSTITUTION**

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### **Abstract.**

The article reveals the problem of the research work of teachers as the basis for the formation of tutoring system of education in higher education; defined concepts: tutor, tutor competence, research work, tutor system of education; the specifics of teachers' research work have been analyzed; the process of forming tutor competence has been determined; the prospects for the development of teachers' research work with tutoring have been outlined.

**Key words:** tutor, tutor competence, research work, tutor system of training.

**Issue statement.** Modern stage of development of education system of Ukraine requires improvement of the tutors' training level. The issue of the day is education managers' constant professional self-realization, and their ability to implement tutoring system in higher education. At the same time, managers of education need a special professional quality to be trained – it is their ability of successful administration.

Reformation of education system in Ukraine is accompanied not only by significant changes in approaches to the implementation of educational process in higher educational institutions, but also to teachers' research work in the process of introducing tutoring system. These changes necessitate effective organization of work, creation of conditions for the development of teachers and students' creative activity, constant search for new forms and methods of teaching tutors [2; 5].

To increase the level of higher education applicants' readiness for tutoring system is necessary

in the process of introducing teachers' research work as the basis for the formation of tutor system of study at a higher educational institution.

**Review of recent papers and research.** The issue of tutoring system formation is relevant nowadays. Various ways of tutoring system implementation are given in the scientific works by S. V. Vetrov, I. M. Dychkivska, G. A. Syrotenko, A. I. Marmaza, O. M. Troitska, V. A. Nikitin and others.

**The research objective** is to determine the peculiarities of teachers' research work in the process of implementation of the scientific and pedagogical project "School for training tutoring skills".

**The statement of basic materials.** Experimental work was carried out in order to implement the Concept of the scientific and pedagogical project "School for training tutoring skills", conducting fundamental and applied research on the problem of professional tutor support, effective use of the creative potential of scientific and pedagogical workers of the departments in research on tutoring skills, as well as on the execution the order of the Ministry of Education and Science Of Ukraine "On conducting an all-Ukrainian experiment on the implementation of the scientific and pedagogical project "School for training tutoring skills" dated 30.06.2016 no. 730 on the basis of Bohdan Khmelnytsky Melitopol State Pedagogical University, Lesya Ukrainka Eastern European National University, Mariupol State University, communal institution "Zaporizhzhia Regional Institute of Postgraduate Pedagogical Education" of Zaporizhzhia Regional Council, communal institution "Kharkiv Humanitarian and Pedagogical Academy" of Kharkiv Regional Council, Communal higher educational institution of Kyiv Regional Council "Academy of Continuing Education", Communal institution Vasylivka Gymnasium "Suzirya" school of I-III degrees" of the Vasylivsky district, Zaporizhzhia oblast, Melitopol Gymnasium no. 9, in Zaporizhzhia Oblast, Melitopol Lyceum no. 10, in Zaporizhzhia Oblast.

In accordance with the plan of work and the program of holding the first (preparatory) stage of the scientific and pedagogical experiment "School for training tutoring skills ", the following tasks were performed: the legal framework was defined and structured; scientific researches on problems of tutor skills were analyzed and systematized; the subjects of joint activity of tutors, tutors and target groups (beneficiaries) were determined; the scope of the functional responsibilities of the participants in the experiment was outlined; the experimental and control

groups that participate in the experiment were determined; current survey of scientific and pedagogical workers, applicants of higher education, teachers, students, parents was conducted to determine their level of readiness for participation in experimental work; the content of the strategic tasks of the scientific-pedagogical project "School for training tutoring skills" was outlined; the scientists of the institutes of the National Academy of Sciences of Ukraine were involved in the project, scientific and pedagogical workers of higher educational institutions, scientific-pedagogical and methodical workers of the State Scientific Institution "Institute for the Modernization of the Content of Education"; leading scientists were involved in carrying out scientific and methodological activities for the project participants; experimental research work was organized in the basic educational institutions of the project participants; practical experience of tutor support in higher and secondary educational institutions was carried out; joint activity with institutions that carries out the scientific guidance of the project, parents, social services, mass media was established; higher and secondary educational institutions that are participants of the project, scientific-methodological, educational-methodological literature and other didactic materials (on orders of educational institutions) were provided; a list of scientific and methodological services, in particular informational, expert, tutor, on the development of teaching and methodological support, which can be provided within the framework of the scientific and pedagogical project "School for training tutoring skills", was compiled; systematic training of participants in the project on innovation and modernization of the education system in Ukraine was organized; a special course "Expertise in the system of higher education for masters of the branch of knowledge 01 "Education", specialty 014 "Secondary education. Informatics" was organized at Bohdan Khmelnytsky Melitopol State Pedagogical University; the "Regulation on the Center of Tutoring Mastery at Bohdan Khmelnytsky Melitopol State Pedagogical University" was developed and tested; the Center of tutoring skills was founded on the basis of Bohdan Khmelnytsky Melitopol State Pedagogical University; creative groups of teaching staff of educational institutions in the areas of experimental and experimental work were formed; trainings with pedagogical staff of educational institutions on the tasks of the project were organized and conducted; the work of conferences, coaching, seminars for the purpose of systematic training of teachers-researchers has started; the first working meeting of the scientific and methodological council of the scientific and pedagogical project "School for training tutoring skills" was held on the basis of the Communal institution Vasylivka Gymnasium "Suzir'ia" –

secondary school of I-III degrees "Vasilivka district, Zaporizhzhya oblast; participation in the international and interdisciplinary conference "Problems of adult education" (24th January, 2017, Higher School of Linguistics, Czenstochowa, Poland) did happen; system of stimulation of participants of innovation activity was developed; participation in the organization and holding of the first all-Ukrainian scientific and practical conference "Teaching as a means of implementing the principle of individualization in education" with the Tutoring Association of Ukraine (08. 02. 2017, Kyiv City House of Teachers) did happen; diagnostics and monitoring of the implementation of the program of the scientific and pedagogical project "School for training tutoring skills" was conducted; the results of the implementation of the Concept of the scientific and pedagogical project "School for training tutoring skills" were made public through mass media and professional printed sources.

In accordance with the program the first (preparatory) stage of the legal framework on problems of tutor skills in Ukraine was analyzed, the program also was discussed at the meetings of the methodological council and the subject departments of experimental educational institutions. For a more detailed acquaintance with the problem of tutorial skills, the experience of the tutors of foreign countries such as Great Britain and Germany was investigated [1; 3; 4].

In the process of experimental work, the functional duties of members of the administration and scientific and pedagogical staff of the basic educational institutions of the scientific and pedagogical project "School for training tutoring skills" were distributed; methodological measures aimed at preparing teachers for the implementation of research experimental work tasks were approved.

In the communal institution "Vasylivs'ka Gymnasium "Suzir'ia" a comprehensive school of the I-III degrees in Vasilivsky District, Zaporizhzhia Oblast, Melitopol Gymnasium no. 9 and Melitopol Lyceum no. 10 in Zaporizhzhia Oblast research work on problems of developing tutoring skills is being conducted, some working materials to ensure the implementation of scientific research in education are in process.

The first working meeting of the scientific and methodical council of the scientific and pedagogical project "School for training tutoring skills" was held on November 30, 2016. It was held on the basis of the communal institution Vasilivska Gymnasium "Suzirya", secondary school of I-III degrees in Vasylivsky district, Zaporizhzhia region with the participation of

representatives of the basic Educational institutions – Bohdan Khmelnytsky Melitopol State Pedagogical University, East Ukrainian National University named after Lesya Ukrainka, Mariupol State University the Communist institution "Zaporizhzhia Regional Institute of Postgraduate Pedagogical Education" of the Zaporizhzhia Regional Council, the Communal Institution "Kharkiv Humanitarian and Pedagogical Academy" of the Kharkiv Regional Council, the Communal high school of the Kyiv Regional Council "Academy of Continuing Education", Melitopol Gymnasium no. 9, Melitopol lyceum no.10.

The purpose of the event was to discuss issues related to the creation of normative legal, social, psychological and pedagogical foundations for the implementation of tutor activity in Ukraine. Participants' speeches were focused on organization of experimental work in basic schools for the project "School for training tutoring skills ", also focused on presentation of contents of strategic tasks of the scientific and pedagogical project, development and substantiation of the theoretical model of tutor activity in the system of national education, and the testing of practical experience in the implementation of tutor support.

The first working meeting of the scientific and methodical council of the scientific and pedagogical project "School for training tutoring skills" was completed with approval of proposals for cooperation and systematic work with teachers of secondary schools within the framework of the project.

On February 8, 2017, the First All-Ukrainian Scientific and Practical Conference "Teaching as a mean of realization of the principle of individualization in education" was held on the basis of Kyiv Teacher's House. It was organized and conducted by the State Scientific Institution "Institute of Modernization of the Content of Education", Tutoring Association of Ukraine along with Bohdan Khmelnytsky Melitopol State Pedagogical University, Ukrainian Pedagogical Club, Communal High School of the Kyiv Regional Council "Academy of Continuing Education". The purpose of the event was to harmonize the views on tutoring and to understand its essence and principles as methodology and technology, to discuss all possible joint projects which provide the introduction of tutoring in education system of Ukraine.

Teachers, graduate students and teachers believe that main tutor's task lies in expanding a student's individual abilities and increasing the effectiveness of disclosure of their abilities. The All-Ukrainian Scientific and Practical Conference "Teaching as a mean of implementing the

principle of individualization in education" was completed by certificates awarding and by planning for further work in the context of the introduction of innovative tutor technologies into the education system of Ukraine.

A qualitative analysis of the results of teachers' readiness for research work on tutoring was carried out with the help of methods of theoretical and empirical levels of scientific research. We saw a change in the levels of components of readiness of teachers for research work on tutoring through a qualitative assessment of the results of the experiment.

In the process of studying the cognitive component, using author's questionnaires, we determined the status of teacher training for research work with a tutorial system at the beginning and end of the experiment. To determine the status of teacher training at the beginning of the experiment, the teachers were asked to answer the following questions: "Is it difficult for you to introduce a tutor's system of studying at a higher educational institution?" In the vast majority of respondents' answers were:

- "yes" - 123 people (56%);
- "no" - 33 people (15%);
- "partially" - 64 people (29%).

Thus, in order to develop the tutor's competence for teachers of higher educational institutions, it is important to update content, forms and methods of their preparation for the introduction of tutoring, development of training exercises, creation of appropriate situations, supplementing the special training in a special course.

The analysis of respondents' answers, comparison of the results of the formation of teachers' readiness for research work with the tutorial system at the beginning and at the end of the experimental work shows quantitative and qualitative changes in the formation of the teachers of the experimental group of readiness for the introduction of tutoring. The results of the experimental work are presented in Table 1.

Table 1. Dynamics of readiness of teachers to research on tutor training system at the beginning and end of the experiment

Levels of formation	Components of readiness for a tutor system of training															
	Motivational-target				Cognitive				Operational-active				Reflective and evaluational			
	At the beginning of the experiment		At the end of the experiment		At the beginning of the experiment		At the end of the experiment		At the beginning of the experiment		At the end of the experiment		At the beginning of the experiment		At the end of the experiment	
	EГ	KГ	EГ	KГ	EГ	KГ	EГ	KГ	EГ	KГ	EГ	KГ	EГ	KГ	EГ	KГ
High	12	10,2	54,3	26,8	15	13,5	49,9	16	11,2	9,7	52,1	12,8	10,3	9,1	53,2	13,8
Middle	27,2	25,7	33,7	48,9	32,2	29,1	34	36,8	26,8	24,9	42,3	46,9	28,4	26,3	34,6	70,4
Low	60,8	64,1	12	24,3	52,8	57,4	16,1	47,2	62	65,4	5,6	40,3	61,3	64,6	12,2	15,8

According to the results of the obtained data while comparing the levels of readiness of teachers to do the research work on the tutorial system of training in the experimental and control groups, we can note that in the control group the level of formation of components increased from low to medium. Quantitative data analysis indicates significant changes in the results of the experimental group: the level of formation of the above components has increased from low to high. As a conclusion, we can note that the formation of one component of readiness for tutoring system affects the formation of another, because all components are interconnected.

**Conclusion.** Modernization of management of a higher educational institution in modern conditions requires a scientific approach to the introduction of innovations, in particular, the tutoring system. Before starting the implementation of tutoring system, the head of a higher education institution should pay special attention to the technology of its application. Consequently, the practical effectiveness of the tutoring system depends primarily on the readiness of education managers to ensure its implementation at the organizational, scientific and methodological levels.

**Prospects for further scientific research.** For the effective implementation of the experimental work, the following tasks are foreseen: to develop and substantiate the theoretical model of tutor activity in the system of national education; to develop teaching-methodological kits, to prepare scientific and methodical literature for the participants of the project "School for



training tutoring skills"; to acquire practical experience of tutor's support and to test it; to create educational content for lecturer-researchers (planning of activities aimed at learning and sharing experience of project participants) to assist teacher-researchers; to develop methodological recommendations for teachers; to develop criteria and mechanisms for evaluating the results of the implementation of the project "School for training tutoring skills"; to form a single resource databank as an information and communication network for project implementation; to create a network of teacher training centers for the implementation of the technologies of the project "School for training tutoring skills"; to organize a permanent seminar "Methodological basis of tutor activity"; to develop network tools for forming the educational environment of the tutor; to develop a comprehensive monitoring of all areas of the scientific and pedagogical project "School for training tutoring skills"; to conduct systematic diagnostics of learning motivation, self-esteem of the reflection levels, creativity and overall creative development of tutors within the framework of the project; to improve the diagnostics of the dynamics of the professional competence of the tutor and the development of pedagogical teams and to systematically implement it.

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**INFORMATION AND COMMUNICATION SPACE  
FOR THE DEVELOPMENT OF PROFESSIONAL COMPETENCY  
OF TEACHERS IN PRE-EDUCATIONAL INSTITUTIONS**

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**Abstract.**

The article outlines the results of the completed study of the Cherkasy Education Portal as an information and communication educational space for the development of professional competence of teachers of pre-school establishments. The views of contemporary scientists regarding the content and structure of the concept ‘professional competence of a teacher’ are researched. The professionally significant digital resources and virtual pedagogical communities of Cherkassy Education Portal are presented, which provide an opportunity for effective professional self-knowledge, self-development and self-realization of teachers of pre-school establishments on the basis of satisfying their educational needs by means of information and communication technologies.

**Keywords:** educator; pre-school educational institution; professional competence; information and communication educational space, professional self-knowledge; professional self-development; professional self-realization.

**1. Introduction. Formulation of the problem.**

Modernization of the Ukrainian educational system sets new requirements for the professional competence of pedagogical workers as a necessary condition for improvement of the quality of

the educational process. The Concept of the New Ukrainian School (Kolehiia MON Ukrainy, 2016) directs the efforts of Ukrainian pedagogical workers to build a personally oriented model of education, in which the ability, needs and interests of each individual are taken into account as much as possible. Teachers have the task to competently solve professional problems that arise in real situations of the educational process, based on the effective use of professional knowledge, personal experience of pedagogical interaction, professionally significant values and qualities.

This provision is fully applicable to pre-school education: the need to ensure high quality of education, upbringing and development of preschool children is determined by the constant development of professional competence of preschool education institutions which must fully understand the essence of the professional pedagogical activity, understand the complex connections and relationships in it as well as modern technologies for achieving the goal of preschool education.

Information and communication technologies are becoming increasingly important in development of the professional competence of educators. The use of virtual social services has now become a quite natural, habitual and widespread day-to-day activity for the vast majority of educators. Functioning in the Internet space of professionally meaningful digital resources, virtual pedagogical communities increasingly provides an opportunity for the effective professional self-development and self-realization on the basis of satisfying their own educational needs. This fact actualizes the problem of creating information and communication space for the development of professional competence of preschool institutions.

### **Analyses of the latest researches and publications.**

Currently, the theoretical foundations of open education systems (V. Bykov, 2009; S. Mahony, 2012), peculiarities of the use of modern information and communication, including cloud, technologies in educational process (B. Alemu, 2015; V. Bykov, 2011), the practical principles of distance education are developed, in particular, the methodology for designing multimedia electronic educational resources and the technology of developing distance courses in a virtual learning environment (M. Simonson, S. Smaldino, M. Albright & S. Zvacek, 2003); F. Chetwynd, C. Dobbyn, 2011; V. Bykov, V. Kukharenko, 2008), the experience of introduction

of mixed learning (V. Kukhareenko, 2015) is presented, the prospects of organizing mobile learning based on the use of mobile devices, mobile educational programs, wireless access (H. Tkachuk, 2018) were explored, including the potential of modern software platforms for creation of institutional depositories (O. Spirin, 2013).

In the context of the investigated problem, the scientific work of M. Kyrychenko, O. Otych, V. Oliynyk (2018), who carried out the SWOT-analysis of development of the system of postgraduate pedagogical education in conditions of integration into the European information educational space, and also outlined the prospects of informatization of the domestic postgraduate education and transformation into an open system. We fully agree with the conclusions of the mentioned scholars that the effective functioning of postgraduate education in the open informational educational space should be ensured due to its variability, flexibility, and ability to create optimal conditions for the individualization of the educational process on the basis of a combination of formal, non-formal and informal education (M. Kyrychenko, O. Otych, V. Oliynyk, 2018, pp. 33-36).

It should be noted that in recent years, a research has been conducted to analyze the strategy of European politics on the use of information and communication technologies in improving the quality of the teacher's work, the characteristics of educational professional communities and networks, electronic resources and platforms intended for the training and the qualification of teachers in European countries have been described, in particular, in the United Kingdom, Latvia, Lithuania, Estonia, Norway, the Netherlands, Slovenia (O. Hrytsenchuk, 2018), the problem of the use of electronic libraries was considered, as they are a necessary tool for updating the content and technologies of the professional training of teachers (O. Kucheruk, S. Karaman, O. Karaman, 2018), the experience of creating a modular system for improving the skills of pedagogical workers is presented, which ensures high-quality mastering of modern ICT and pedagogical technologies for their further development application in the provision of educational services, development of high-quality digital content and open e-environment as an instrument for significant improvement of the quality of educational process (N. Morze, O. Buinytska 2017).

According to our beliefs, systemic and integrated use of the above-mentioned potential ICTs will contribute to more effective professional development of pedagogical workers, in particular, of teachers of pre-school establishments. Our analysis of the scientific works of G. Belenkova

(2011), V. Gorlenko (2016), N. Melnyk (2016), Kh. Shaparenko (2014) and other scholars in the field of preschool education makes it possible to note the attention of researchers to certain aspects of use of information and communication technologies in the activities of pre-school establishments. However, the problem of using the potential of modern ICTs in postgraduate professional development of pre-school educational institutions has not been adequately reflected in the work of domestic scientists yet.

In view of the above, **the objective** of the article is to highlight the results of the study on the potential of the Cherkasy Education Portal as an information and communication educational space for the development of professional competence of pre-school education institutions, which provides opportunities for teachers of pre-school establishments for professional self-knowledge, self-development and self-realization on the basis of Individualization of formal, non-formal and informal postgraduate education.

**2. Methodology of research.** At the stage of theoretical comprehension of the studied problem, general methods and techniques of cognition were used: analysis of legal documents concerning the modernization of the Ukrainian system of education and scientific and pedagogical literature on the issues of introduction of information and communication technologies in the educational process of various levels, comparing the positions of scientists with the content of the concept of "professional competence" ", systematization and generalization of theoretical data to determine the degree of development of the problem in modern science, content analysis of Cherkasy Education Portal in terms of potential possibility for distance education and self-education of teachers of pre-school education.

**3. Results of the research and discussion.** First of all, we note that the Cherkassy Education Portal (<http://oipoppp.ed-sp.net/>) is a regional information and communication space for postgraduate pedagogical education created by a scientific and pedagogical staff of the Communal Educational Institution "Cherkasy Regional Institute of Postgraduate Education of Cherkasy Oblast Teachers of Cherkasy Regional Council". The portal contains 30 separate powerful sites, the purpose of which is to meet the educational needs of the teaching staff in their

own professional development.

According to Google Analytics, in 2017, the Cherkassy Education Portal was visited by 612,000 users who viewed 9,452,215 pages. Monthly, on average, there are about 51,000 visits, daily - more than 2,000 users. In six months of 2018, there were more than 345,000 users from Cherkasy region and other regions of Ukraine, and also from many countries of the world (mostly from the Netherlands, Germany, the USA, Russia, the United Kingdom, Canada, the United Arab Emirates, Greece) users took an advantage of the potential of the Cherkassy Education Portal.

On the basis of the elaboration of the scientific works of V. Bykov (2009), Yu. Zoria (2012), V. Kukhareenko (2015), O. Spirin (2013) and other modern Ukrainian scholars, the information and communication educational space is treated as a system of interconnected factors, conditions, means, joint efforts of the subjects of the educational process in different types organized on the basis of the use of ICT interaction, which has an integrated impact on the professional development of pedagogical workers and provides opportunities for their professional self-determination, self-realization and self-development. At the same time, structurally informational and communication educational space of postgraduate education is understood as a complex system that accumulates informational, organizational, intellectual, methodological, technical and software resources and promotes informational and educational interaction of teachers in the process of their professional development and self-development.

In order to create information and communication educational space for the development of the professional competence of preschool education institutions, we turned to the scientific works of contemporary scholars in the field of preschool pedagogy, which, firstly, made it possible to generalize theoretical knowledge regarding the essence and structure of the concept of "professional competence of the teacher of the institution of preschool education", and secondly, it was possible to determine the priority aspects of the professional development of educators by means of information and communication technologies in the system of postgraduate education.

It was found that the term "professional competence of a teacher of a pre-school institution" is interpreted by scientists as:

- understanding of the methodology of preschool pedagogy and its connection with other branches of science, professional knowledge of the theory and methodology of preschool education; vision of the future, the latest technologies and methods, ability to predict, apply

different methods of self-control and self-knowledge, methods of scientific research in order to obtain real knowledge of oneself and their professional activities, desire for self-improvement, desire to improve their professional level (N. Miller, 2016);

- the ability to effectively design and carry out professional activities on the basis of professional knowledge, skills and experience, which are integrated with the development of personal professional qualities (G. Belyenka, 2011)

- understanding of the essence of the tasks of preschool pedagogy; knowledge of perspective and innovative experience in the field of preschool education and its active implementation; the ability to choose the means that are adequate to the specific circumstances of the professional activity; sense of responsibility for the results achieved; the ability to self-assess professional activity and level of own professional competence; readiness for professional development and self-development (Kh. Shaparenko, 2014).

Within the framework of the research project "Requirements for the professional activity of pedagogical workers", which was carried out by the scientific and pedagogical workers of the Cherkasy regional postgraduate education teacher training institution in cooperation with the scientists of Mykolayiv, Kharki and Donetsk Regions in organizational and financial assistance of the World Bank and the Ministry of Education and Science of Ukraine during 2009-2010 "Professional qualification characteristics of the pre-school teacher based on a competent approach" was developed and placed on the Cherkasy educational portal (<http://oipoppp.ed-sp.net/node/600>).

During the research it was investigated that the professional competence of the teacher of the institution of preschool education structurally consists of three main blocks of competencies: basic (pedagogical), general-professional and special-professional competencies.

In its turn, the components of the basic (professional) competence of the teacher of the institution of pre-school education are defined as: the ability to implement the functions of vocational and pedagogical activities (readiness to use tools and techniques for motivating and stimulating the subjects of pre-school education, the ability to determine the strategic, tactical, operational goals of preschool education, plan processes to achieve the desired results, to find the appropriate methods, forms, means of teaching activity, the ability to construct pedagogical sciences, to develop methodological support of the pedagogical process, to carry out research

work, to analyze and generalize own pedagogical experience, to be able to evaluate the results, means of their achievement and to determine ways to improve the quality of pre-school education), as well as social (ability to live in a society, interaction and work in the team), general cultural (the ability to develop a culture of personality and society in various aspects), healthcare-saving (preservation of physical, social, mental and spiritual health of all participants of the pedagogic process; use of healthy lifestyle skills, harmonization of work and rest regimes; prevention of occupational stress and burnout), civil (activity in the sphere of social and political life in Ukraine, ability to protect the rights and freedoms of participants in the pedagogical process, fulfillment of civil duties) and information (the ability to apply information and communication technologies in professional activities and everyday life, the rational use of ICT in solving the tasks of pre-school education related to the processing of information, its search, systematization, storage, presentation and exchange; to carry out their own professional development with the help of ICT tools) of competence.

The second block of the professional competence of the teacher of a pre-school educational institution is represented by the general-professional competencies, the components of which are methodological, professional-theoretical, normative-legal, general-methodical and general-technological knowledge; methodical (possession of various methods, techniques, methods of preschool pedagogy and the ability to apply them in pedagogical practice) and technological (ability to use modern technologies of teaching activity and modern technical means) skills, as well as social and personal qualities (ability to professional and pedagogical cooperation, manifestation of civil, moral and professional qualities).

The third block of professional competence of a teacher of the institution of pre-school education - "Special-professional competence" - requires the presence of three aspects of professional knowledge: special-theoretical (knowledge of the provisions of the state standard of pre-school education "Basic component of pre-school education", the requirements of the Basic program of the development of children of pre-school age "Me in the world "; instructions on the organization of the protection of the life and health of children, safety and life, modern advances in pedagogical and psychological science and practice in pre-school education); specialist-methodical (knowledge of the methodology of pre-school education, information about anatomy and physiology of children, basics of pre-care, basic principles of defectology and speech



therapy, knowledge of criteria and indicators of development of preschool children, awareness of the rules of life and health of children), special-technological knowledge about the peculiarities of the application of technologies of development, training and upbringing of pre-school children, the essence of innovative technologies of psycho-pedagogical design, psychological support to the process before school education). In addition, the requirements of the special-professional unit of competencies of the educator are the availability of special-methodical and special-technological skills (the ability to plan, organize and carry out educational and recreational work to ensure appropriate social, spiritual, moral, physical and mental development on the basis of studying features, interests and the abilities of children; to carry out the diagnosis of the pupil's development of the institution of pre-school education; to predict the results and carry out self-analysis of their own pedagogical activity; the ability to use modern technologies of pre-school education and modern technical means), the ability to implement design and organizational functions in relation to pre-school education, as well as the manifestation of personality and pedagogical qualities (humanity, kindness, sensitivity, justice, honesty, sincerity, activity, purposefulness, perseverance, diligence, initiative, communicability, independence, ability to reflect, demanding, tact, emotional stability, and others).

The consideration of the results of the theoretical search confirmed us in the sense of the basic requirements for the creation of information and communication educational space within the framework of the Cherkassy Education Portal for the development of professional competence of the teachers of pre-school establishments, namely:

- it is expedient to use modern information and communication technologies to promote the self-diagnosis of the level of the professional competence of educators of pre-school establishments, their personal professional self-knowledge;
- provision of professional self-development of teachers of pre-school educational institutions on the basis of an optimal combination of formal, non-formal and informal postgraduate education of educators by means of ICT;
- development of professionally meaningful digital resources, establishment of functioning of virtual pedagogical communities to present the results of professional self-realization of the teachers of pre-school establishments.

The self-diagnosis of the level of their professional competence can be made by the educators

of pre-school educational institutions through the use of the above-mentioned "Professional-qualification characteristics of a pre-school teacher of a pre-school educational institution based on a competent approach", located at the Cherkasy Education Portal. On the basis of professional in-depth analysis, educators can draw a conclusion on the level of their own professional development for each of the indicators of basic (pedagogical), general-faculty and special-professional competencies, which in their aggregate constitute professional competence. In addition, participation in the Distance Learning and Practical Center for Self-Cognition and Personal-Professional Self-Improvement (<http://oipoppp.ed-sp.net/taxonomy/term/4022>) provides the opportunity for educators of pre-school establishments to master the theoretical foundations of the pedagogical system of self-knowledge, and also a method of personal and professional self-improvement of the subject of pedagogical activity on the basis of self-knowledge.

**Self-development** of the professional competence of preschool education institutions is provided on the basis of an optimal combination of formal, non-formal and informal postgraduate education by means of information and communication technologies.

Thus, one of the sites of the Cherkasy Education Portal provides the organization of distance training courses for preschool education institutions. This form of formal postgraduate education provides the mentor with new competencies within the framework of professional activities in the field of pre-school education. Particular attention is paid to updating the content of continuing professional development of preschool institutions in accordance with the requirements of society for the quality of preschool education, taking into account the latest achievements of the world and national science, as well as educational needs of students of courses.

Practically-directed programs of advanced training courses (<http://adc.ippro.com.ua/moodle/login/index.php>) provide the acquisition of competencies by specialist (subject specialization or specialization), pedagogy and psychology necessary for:

- implementation of a qualitative process of training, upbringing and development of children of preschool age, including those with special educational needs;
- introduction of the principle of childhood centeredness and pedagogy of partnership;
- monitoring of pedagogical activity and analysis of pedagogical experience of organization of preschool education, carrying out of educational measurements;

- application of educational technologies and methods of preschool education, effective ways of interaction of all participants in the educational process.

In order to develop the socio-psychological competence of educators of pre-school establishments, the Cherkasy Education Portal organizes workshops in the on-line mode "Self-regulation of Behavior and Life", "Critical and Innovative Thinking", "Perfection of Interpersonal Communication"; "Development of Intrapersonal Skills". This gives educators the opportunity to better understand the problems of their own professional development, prevention and overcoming of psychological barriers, designing an alternative scenario of their professional life. In addition, within the framework of distance training courses, students are encouraged to master the "Technology for the creation of an individual card of the professional and personal development".

The results of the study provide an opportunity to note the existence of a powerful system of informal postgraduate education on the Cherkasy Education Portal, which provides professional development of preschool education institutions based on the use of information and communication technologies.

In particular, the Virtual Academy of Methodological Education actively functions as a regional network system for the continuous improvement of the skills of pedagogical workers, which is part of the website "Internet School of Professional Skills" (<http://courses.ippro.com.ua/>), which offers teachers of pre-school establishments to take distance courses on the actual problems of preschool education: "Development of the life competence of the person of the preschool child", "Formation of health preserving competence in children of preschool age", "Psychological principles of the differential approach in pedagogical interaction", "The basis of professional-creative self-realization of the teacher of the institution of pre-school education", "Psychological help to children of preschool age from crisis families", "Innovative methods of diagnostic work with family", "Inclusive education of children with special educational needs" and others. Consequently, educators have the opportunity to choose, in the remote mode (according to their professional preferences and the level of their professional competence), to obtain special courses certified by the academic council of the institute and obtain a corresponding certificate (certificate) about additional specialization.

Educators of pre-school establishments who have just begun their professional activities can

take part in the work of the "Virtual School for Professional Development of a Young Teacher" (<http://teacher.ed-sp.net/>), whose structural components are the Internet Box of Useful Information, a remote advisory point on various educational issues, a virtual master class, an express survey on various problems of pedagogical activity of beginner teachers; online activities for young teachers; discussion forum and others.

In order to implement various forms of distance psychological education, pre-school education providers at the Internet School of Psychological Literacy website (<http://psycholog.klasna.com/uk>) are invited to learn the distance special course "Peculiarities of the mental development of a child of preschool age: age crises, main types of activities" and the workshop "Development of emotional and voluntary self-regulation of the participants in the educational process", as well as to use materials for psychological support of preschool parents, in particular video clips for use by teachers at parents' meetings. These videos aim at brightening adults (parents, the closest social environment of children) regarding the influence on the development of the child's personality of such important factors as the psychological atmosphere in the family (the interaction of parents with each other, the particularities of communication with the child), the personality of the parents themselves as an example for imitation (peculiarities of behavior, language), mass media and Internet space.

Another site of the Cherkasy Education Portal - "Internet School of Humanistic Pedagogy" (<http://pedgum.klasna.com/>) - provides an opportunity to learn the pedagogy of partnership and technology of a humane-personal approach to educational activities.

We consider it expedient to emphasize that all certificates received by the region's teachers on the results of distance learning in the above-mentioned Internet schools are accounted appropriately, and therefore are taken into account during the attestation and certification of teaching staff.

A significant influence on the development of the professional competence of pre-school educational institutions carries out their participation in training sessions, workshops, webinars, master classes, scientific and methodological studies and other distant forms of advanced training in the intercultural period. Thus, Internet-based online webinars have become significant for teachers: "The New Ukrainian School in the realities of the information society", "Using the opportunities of network audio-visual services in distance education", "Organization of

productive activity of pre-school children in a pre-school education and families "," Best practices in the use of interactive exercises in educational activities" and others.

The analysis of the content of the Cherkassy Education Portal has shown its significant potential for organizing informational education (self-education), which involves the self-organized acquisition of certain competences by preschool institutions. The Portal creates an environment that, firstly, activates the self-education activities of educators, and secondly, provides an opportunity for teachers to present the results of **professional self-realization**.

So, to help educators in self-improvement of qualification there is a section of the site "Scientific and methodological provision of educational institutions", where the relevant normative documents, new scientific-methodical and informative materials are collected. The full-text archive section of the file contains 1877 materials. For kindergarten teachers, typical education programs for pre-school children, Early childhood assistance programs for children with special educational needs, methodological recommendations, methodical complexes, methodological aids, workshops, activities, hobbies, themed weeks, projects for work with pre-schoolers and their parents, as well as other tutorials are offered. (<http://oipoppe.net/taxonomy/term/2555>).

We can state that the stimulus for self-development by the teachers of their own professional competence is the section of the Cherkassy Education Portal "Collection of Digital Resources", which maximally provides teachers with the additional resources necessary for a qualitative educational process by means of visual, didactic, interactive means and information materials from each branch of education.

The collection includes static, dynamic and interactive digital resources, namely: educational, methodological, artistic and scientific texts; electronic manuals; pedagogical software tools; multimedia presentations; multimedia, interactive games and competitions; audio and video files; graphic images, photos, tables, graphs; didactic materials; interesting parts of lessons; multimedia projects; copyright video films; video master classes; digital copies of artistic and popular science films and cartoons; dictionaries, reference books, etc.

We will emphasize that all digital resources of the collection are freely accessible to every user of Ukraine and the world. Today, for preschool education, the archive of the collection has

over 900 digital resources.

For the presentation of results of professional self-creation, the Virtual Pedagogical Club "Wonders of preschool pedagogics" (<http://divo.klasna.com/>) has been created, which enables educators of pre-school establishments to present their own professional experience through participation in Internet conferences, webinars, as well as placing video materials that demonstrate certain professional achievements in the field of pre-school education.

In addition, their own creative work and innovative achievements are the most competent educators of pre-school establishments able to place on such sites of the Cherkasy Education Portal as "Creative workshops of educators of Cherkasy region" (<http://creative.klasna.com/en/site/tvorchi-maisterni-pedagogiv-doshkilnikh-navchalnikh-zakladiv-1.html>) and "Teacher's treasure chest for educators of Cherkasy Region" (<http://master.klasna.com/>).

The services of teachers of pre-school establishments that carry out self-education activities are the site of the "Electronic Library of Methodical Literature" (<http://library.ippro.com.ua/index.php/golovna-storinka>), which contains full-text materials developed by the scientific and methodological staff of the institute, publications and articles on scientific and methodical themes. It should be emphasized that the electronic library of methodological literature is an open library and provides free access for readers to scientific and methodical publications with the right to read, download, copy, search, refer to full-text articles, that is, to use electronic editions with the observance of copyright for their own professional development.

#### **4. Conclusions and perspectives for further research.**

The results of the study confirmed the significant potential of the Cherkasy Education Portal for the development of professional competence of preschool education institutions. In particular, it has been proved that the optimal combination of formal, non-formal and informal postgraduate education creates conditions for the free choice of educators of their own trajectory of participation in various forms of professional development, based on the use of distance education technologies along with professional interaction and communication with means of

information and communication technologies. Thus, the educational needs of preschool education institutions in their professional development and, as a consequence, the needs of the state in the qualified teachers who are able to provide high-quality education and develop the New Ukrainian School are fully met.

Further studies consider it expedient to focus on the development of the content of the Cherkasy Education Portal, which would provide an opportunity for joint project activities of educators on topical issues of preschool education based on the use of information and communication technologies, as well as the search for ways of wider use of cloud technologies as a tool for improving the efficiency of professional development educators of pre-school education institutions.

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**EXPERIENCE OF HEALTH SCHOOLS IN UKRAINE AND EASTERN EUROPE****T. Berezhna<sup>1</sup>, O.Yezhova<sup>2</sup>, A. Biesiedina<sup>2</sup>**<sup>1</sup>State Scientific Institution «Institute for Modernization

of the Content of Education», Kyiv, Ukraine

<sup>2</sup> Sumy State University, Sumy, Ukraine**Abstract.**

The article analyzes the peculiarities of the Schools for Health (SH) models in Poland, the Czech Republic, Hungary and the Russian Federation, and proposes a modern Ukrainian model of the School for Health.

In the article the model of the SH in Ukraine is proposed. It is based on the environmental, holistic, personality-oriented and competent approaches.

The conclusion is made on the need to intensify the activities and implementation of the current developments of the pedagogical science in the National Network of Health Promoting Schools.

**Keywords:** Schools for Health, students, secondary education institution, health-oriented activities.

The article analyzes the peculiarities of the Schools for Health (SH) models in Poland, the Czech Republic, Hungary and the Russian Federation, and proposes a modern Ukrainian model of the School for Health. The Polish model of SH is based on the environmental approach. Health-oriented activities are conducted in three leading areas: preventive education; healthy physical and social environment. The Czech model is based on the holistic and personality-oriented approaches. The activities of the SH is aimed at the creating of a health-preserving educational environment; “valeologization” of the studying process; open partnership of the SH.

The SH models in the Russian Federation and in Hungary correspond to the common European one.

In the article the model of the SH in Ukraine is proposed. It is based on the environmental, holistic, personality-oriented and competent approaches. It consists of three blocks: theoretical, content and procedural and effective one. The purpose and objectives of this model are realized through the components of the content and procedural block. It includes a creation of a health-preserving educational environment, which involves spatial and substantive sufficiency; content, forms and methods of the formation of the value-based attitude to health; communication of subjects of educational process and provision of pedagogical conditions of the health-oriented activities.

The conclusion is made on the need to intensify the activities and implementation of the current developments of the pedagogical science in the National Network of Health Promoting Schools.

### **Problem statement**

A modern state-building processes in Ukraine, in particular the reforming of the national education system, raise the question of the modern school's mission to a new level. The institution of the general secondary education traditionally cares for the health of its students, because, as known, the state of their physical health is reducing during educational process. Most educational programs, techniques, technologies are aimed precisely at the preserving, strengthening, forming and restoring the health of children. This area has gained a considerable experience both in our country and abroad. One of the best European practices can be seen in the experience of the SH that are part of the well-known network of Schools for Health in Europe (by 2007 the European Network of Health Promoting Schools).

Health-oriented activities of SH in the national networks involves the development of a preventive education strategy through the formation of an optimal school health-preserving environment, organization of training to preserve and strengthen the health of students, the formation of value-based attitude to health, health culture, healthy lifestyle.

The issue of developing a Ukrainian model of the School for Health is very relevant for today,

since the overall modern national model has not been developed yet. Such a model should aim at bringing together all the areas of the educational institution's activities (educational, cognitive, managerial, designing, therapeutic and preventive, recreational, social and pedagogical) concerning the preservation, strengthening, formation and rehabilitation of children's health.

The purpose of the study is to analyze the peculiarities of the SH models and to offer a modern model of the School for Health.

### **Main material presentment**

In order to improve the health of population, Ukraine joined the international project "European Network of Health Promoting Schools" in 1995. In 2003, the National Network of Health Promoting Schools was formally established.

In determining the concept of "School for Health", we rely on the definition of the WHO (2000): it is a health regulating school that is constantly developing all health-oriented conditions for studying and recreation of children, adolescents and youth [10].

The activities of the Schools for Health in Europe are presented in an eight-component model:

- 1) educational dimension - providing information on healthcare and value-based attitude to health in the content of many educational disciplines aimed at improving understanding of the basics of health by students and aimed at the change of their behavior;
- 2) medical dimension - improvement of the school medical service by strengthening its preventive function and early intervention, including emergency medical care, organization of permanent interaction with medical organizations at the place of residence of students, system of preventive work with chronically ill; organization of a healthy food system;
- 3) sanitary and hygienic dimension - creation of appropriate conditions for preservation and strengthening of health of schoolchildren, creation of positive physical and mental climate at school; involvement of parents and the public in health-oriented activities;
- 4) level of physical training and physical activity of all schoolchildren;
- 5) psychological and diagnostic dimension - systematic assessment of the health of all participants in the educational process (students, pedagogical and technical staff), readiness for joint action on health-preserving of students; organization of psychological counseling for all participants of the educational process and school services on these issues;
- 6) organization of

school food; 7) ensuring the health-preserving school environment; 8) integration of efforts of the school, parents and the public. [4, p. 44-45]. In different European countries, the national models of Schools for Health take into account the most relevant directions for them.

Hereafter some models of Schools for Health from the European countries will be reviewed. The model of the School for Health that is developing in Poland, based on the hierarchical “Maslow Pyramid” with an open top, is described by B. Woynarowska [7, p. 16]. The model is based on the conditions for effective work of the health promoting school: 1) participation, partnership, cooperation; 2) effective and systematic activity. There are three main directions of health-oriented activities: 1) health through education; 2) healthy physical environment; 3) healthy social environment. The upper part of the pyramid reflects the expected result of the health-oriented activities of the School for Health: 1) individual actions on his/her own health; 2) the well-being of the school and society. The top of the pyramid remains open, which means further development of the individual. In the activities of the Polish health promoting schools scientist B. Woynarowska and M. Sokolowska consider as the most important the following: 1) the development of preventive education as an important part of the obligatory school curriculum; 2) creation of health-preserving environment, popularization of a healthy lifestyle and the influence of social policy to support the education and adjustment of school medicine and; 3) interaction with parents and the local community. [8, c. 118-120]. It is believed that the Polish model is based on the environmental approach.

The Czech health promoting schools` activity is based on a general model developed by M. Havlinova. According to this model, the purpose of the health promoting schools in the Czech Republic is to teach children, parents and teachers the skills of a healthy lifestyle and to form a value-based attitude towards their health that will ensure the life of each of them at a higher level. The activity of the school is aimed at: 1) creating a health-preserving educational environment for the well-being of students; 2) “valeologization” of the studying at schools; 3) open partnership (development and expansion of partnerships among Ministries of Healthcare and Education, Ministry of Youth Policy and other relevant ministries at the state level) [9, p. 19-20]. According to our reckoning, the model of the School for Health in the Czech Republic is based on a holistic and personality-oriented approach.

In the Russian Federation and Hungary, the model of the School for Health corresponds to the

above-mentioned eight-component model: 1) health-preserving environment; 2) participation of parents and society; 3) “healthy” workplace (sanitary and hygienic requirements); 4) health-preserving learning; 5) physical activity and sport; 6) healthy food; 7) a medical support system; 8) psychological and social support.

In general, all of our Schools for Health models have proven their effectiveness and potential. It should be noted that all models deal with a health-preserving educational or school environment. This testifies to the awareness and understanding of educators about its impact on the health of children.

In Ukraine, at the beginning of work of the National Network of Health Promoting Schools in Ukraine, V. Movchanyuk (the coordinator of the NNHPS from 1995 to 2001) developed a School for Health model aimed at:

1) observance of the sanitary and hygienic conditions of the educational process, sanitary and educational work among pupils and their parents, teachers, sometimes with the addition of rehabilitation activities;

2) improvement of programs of health-oriented activities, their integration with other subjects, the introduction of the national program “Valeology”;

3) physical, mental and social development of students;

4) promotion of a healthy lifestyle [1, p. 59].

It should be mentioned that there is no holistic vision of the educational environment in this model as a health-preserving (separate components of the school environment are represented), which is connected with objective factors, namely the level of scientific pedagogical research at that time. We believe that today this model has fulfilled its function; therefore there is a need to develop and to introduce a new one taking into account the challenges of the modern world and the experience of the European countries.

The analysis of the current state of the Schools for Health in Ukraine has shown a variability of the School for Health models. Each school is guided by its "author's model", which focuses mainly on the formation of a health-preserving environment and a value-based attitude to their own health and health of others. For many educational institutions, the health-oriented activity of

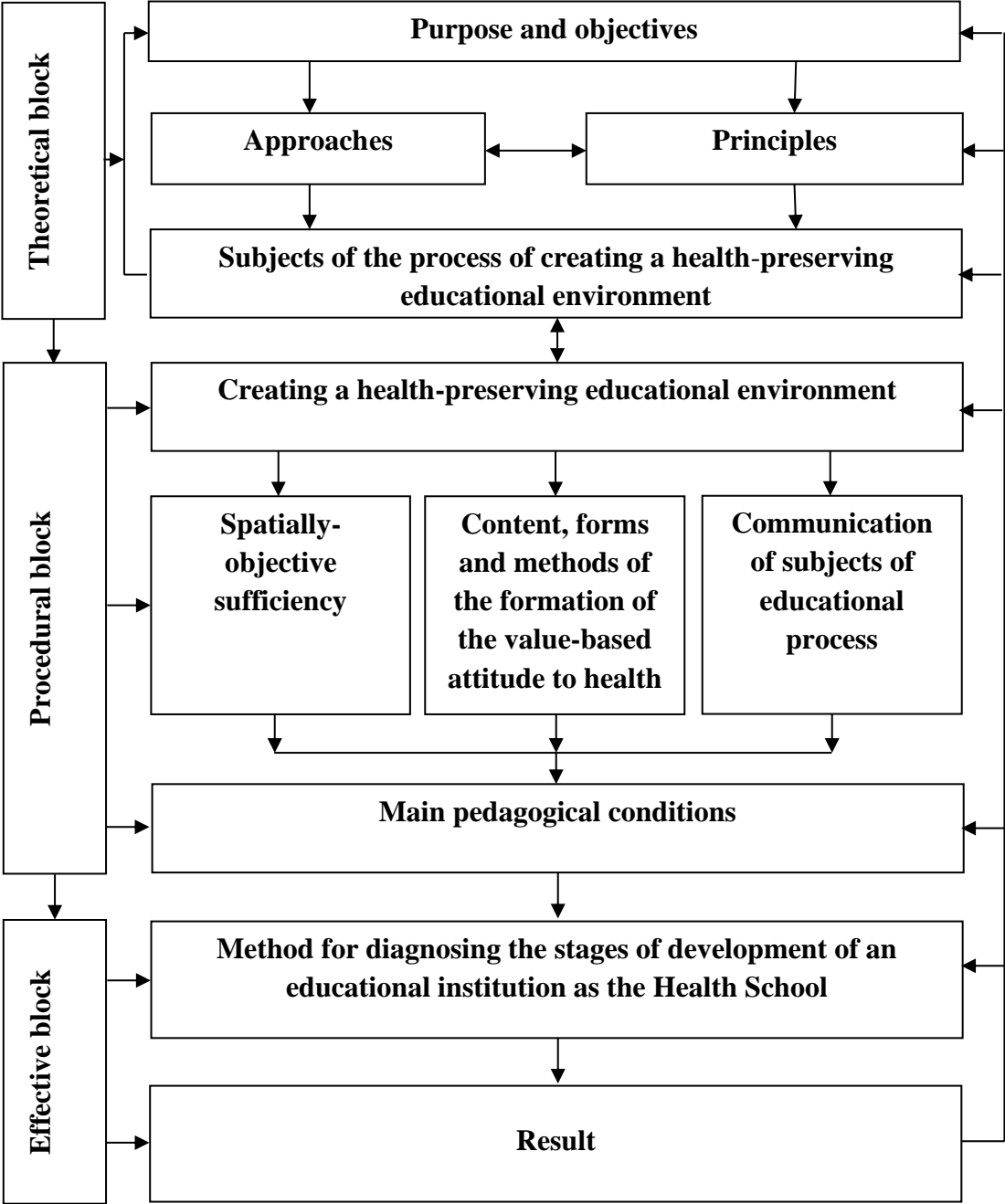
school is based on the creativity of the teacher, so schools choose different directions:

- introduction of health-preserving pedagogical technologies;
- “valeologization” of the educational process;
- pedagogy of health;
- physical education and strengthening of physical fitness of students;
- psychological and pedagogical support of children;
- preventive education;
- safety of pupils' life activities;
- health culture;
- spiritual and aesthetic improvement [5, p. 49].

Current models of Schools for Health reflect the health-oriented system of educational institutions, the implementation of health-preserving technologies in the educational process. But in author's models, as a rule, the content-procedural block (content, forms, methods, technologies) of health-oriented activity is well reflected, but there is practically no theoretical (scientific basis of the model) and meaningful criteria for evaluating the effectiveness of the activity.

We share the opinion of S. Kirilenko that the model of the School for Health should exist as an integral system, the unity and interconnection of all components of which lead to rise in its integrity and growth of productivity [3, p. 49]. We believe that the model of the School for Health necessarily should be aimed at the formation of a health-preserving educational environment.

On the basis of foreign and domestic experience, we propose a model of the School for Health that reflects the process of formation of health-preserving educational environment by introducing modern scientific approaches, principles, content, forms, methods and conditions of organization of activity (fig.). All components of the model are interconnected into a holistic system complex. Such a model covers theoretical, content-procedural and effective units.



**Fig. Model of the School for Health in Ukraine**

The target unit includes: the purpose and tasks, scientific approaches, principles and subjects of the educational institution as a School for Health. The purpose of the activity is to form a value-based attitude towards health and skills for a healthy lifestyle through the creation of a health-preserving educational environment.

The model is based on competent, holistic, and personality-oriented approaches. Application of a competent approach presupposes the formation of students' health-preserving competence, the development of creative abilities, increase of the practical orientation of education, improvement of skills of self-education and self-realization. The holistic approach ensures to consider health as a holistic phenomenon, which includes four interrelated components - physical, mental, social and



spiritual health. The application of the personality-oriented approach ensures the consideration of the individual characteristics of students, diagnostics and adjustment of the level of formation of personal qualities concerning the value-based attitude to their own health and health of others, encouraging each student to health-oriented activities, developing leadership qualities, identifying and overcoming causes, which do not allow students to achieve the goal of personal development.

We agree with S. Kyrylenko [3] that the health-oriented activity of the School for Health should be based on the following principles:

1) democratization - means that the activities are based on the cooperation of teachers, students, parents in solving health-preserving tasks, the adoption of such forms that contribute to the formation of a value-based attitude to the health of the subjects of the educational process;

2) humanization – means the perception of the student's personality, his life and health, as well as the life and health of teachers, all employees of the educational institution as the highest social values; the recognition of their right for safe conditions of study and work; the formation of healthy relations between pupils, teachers and parents, the establishment of a culture of relationship between pupils and teachers;

3) individualization and differentiation – presuppose taking into account the physical, mental, social and spiritual development of students, their social activity;

4) integration – means the combination of efforts of teachers, families and the public in shaping pupils' cognitive abilities on the basis of awareness of health as a value;

5) the principle of taking into account the interests and needs of all subjects, which requires that in the process of organizing health-oriented activities the interests, demands and needs of all the participants - students, pedagogues, parents - are taken into account.

The implementation of these principles is carried out in the process of health-oriented activities at the lessons, during extracurricular and out-of-school activities of pedagogical and student groups, parents, public figures, members of children's and youth organizations operating in educational institutions.

The core point of the structural model of the School for Health on the way of development of an educational institution is the subjects of the educational process, i.e. students, teachers,

medical workers, social-pedagogical workers, psychologists, parents and community. Students, along with other subjects of the educational process, take part in health-oriented activities.

The purpose and objectives of the School for Health model are implemented via the components of the content and procedural unit – i.e. the creation of a health-preserving educational environment, which involves: spatially-objective sufficiency; content, forms and methods of formation of value-based attitude to health; communication of subjects of educational process and provision of pedagogical conditions of health-oriented activities.

According to V. Yasvin [6], the spatially-objective sufficiency of health-oriented activities of the School for Health includes the infrastructure of the institution. Modern infrastructure for providing health-oriented activities includes personnel, material and technical, educational and methodological maintenance and sanitary and hygienic conditions. Personnel maintenance must meet the current regulatory requirements regarding the activities of the educational institution. The material and technical maintenance of the School for Health is aimed at such a change in the educational process at the present stage, which guarantees physical and psychological safety, does not present a risk to the health of all participants. The development of information and communication technologies presupposes the conduct of electronic diaries and student health letters on the school's website, the creation of electronic libraries for the purposeful activity of students and teachers, and the active use of various digital educational resources at the lessons.

Unfortunately, material and technical maintenance is one of the most problematic areas in the activities of Ukrainian Schools for Health. The lack of financial support at all levels of government hinders the development of the National Network of Schools for Health Promotion. The activity of such schools is supported by caring and committed teachers and school administration and is based on voluntary basis.

Educational and methodological maintenance of the School for Health is aimed at supporting the health-oriented activities of each teacher, the availability of round-the-clock access to various methodological, informational and consulting resources. An integral part of the methodical component of the school's infrastructure is the rooms of the Health Fundamentals, relaxation, therapeutic physical training, etc. Nowadays, most educational institutions that wish to work on the establishment of a School for Health are not well-informed on these issues; do not have educational and methodological manuals and guidelines. Therefore, teaching and methodological

maintenance requires scientific and pedagogical support.

The provision of optimal sanitary and hygienic conditions in educational institutions is one of the important elements in creating a health-preserving educational environment. This is possible only with the introduction of a carefully implemented system of control by medical and pedagogical workers. Rational organization of educational process involves, first of all, the drawing up of a schedule of lessons, elective and individual classes, work of hobby groups, etc. in accordance with the State sanitary rules and norms. In order to provide the necessary conditions, scientists and specialists in the field of hygiene of children and adolescents have developed a number of regulatory documents that regulate the hygienically sound conditions of education, upbringing and rehabilitation.

Particular attention in the implementation of the model is given to the proper nutrition of students, which should provide the optimal need for a child's body in certain amounts and ratios of proteins, fats, carbohydrates, mineral salts, vitamins, and the like. The menu should use products with antioxidant, sorbent-binding effect: fresh vegetables and fruits, various kinds of cereals, meat, fish, and dairy products. The technological process of cooking should comply with sanitary and epidemiological requirements. Students' nutrition should be diverse, according to the age and physiological needs; it should be provided according to the schedule. The issue of drinking regime organization at the School for Health is very important.

The leading importance in creating a health-preserving educational environment belongs to the content principles, forms and methods of organization of the School for Health. The content of the formation of value-based attitude to health is considered as the system, the scope and the nature of knowledge, skills and abilities of students' health-preserving activity during the lessons, extra-curricular and extra-curricular work.

Formation of value-based attitude to health is carried out through the transfer of knowledge and the formation of health-preserving competence within different disciplines: From the very beginning of work on the construction of a holistic system of the School for Health, the emphasis is on the need for "valeologization" of the educational process, which involves "valeologizing" the contents of all educational subjects, the application of various effective health-preserving technologies.

Health-preserving technologies involve the change of activities, alternating activities - intellectual, emotional, motor; group and pair forms of work that contribute to increased motor activity, teach teamwork, ability to respect the opinions of others and to express their own thoughts, rules of communication; gaming and gaming situations, non-standard lessons, integrated lessons.

Among the methods of work on the formation of value-based attitude to health we distinguish:

- for teachers - work in groups, analysis of problem situations, role play, discussion, persuasion, encouraging, creating the situations of success, showing the prospects, suggestion, demand, correction, method of dilemma, creation of public opinion, positive outlook, competition, rituals, traditions, personal example, self-belief, motivation, exercise, self-correction, social tests, reflection, etc.;

- for students - interactive and active methods, cognitive-research, feedback, game and practical, visual, art-methods;

- for parents - discussion, informing, persuasion, showing the prospects, etc.

We highlight the most promising forms of work:

- for teachers - seminars, courses, trainings, lectures, summer schools, conferences, etc.;

- for students – lessons, communication hours, competitions, talks, games, conferences, forums, festivals, debates, trainings, social projects, online forums, press conferences, discussions, consultations, posters; mass, group, individual and independent work, etc.;

- for parents - lectures, conversations, meetings, trainings, discussions, thematic meetings, conferences, group and individual consultations, sports holidays, family evenings, etc.

A significant factor influencing the creation health-preserving educational environment is communication of the subjects of the educational process, including the socio-psychological climate, school authorities, providing psychological services, parent involvement. Socio-psychological climate of Schools for Health has impact on the level of student's personality formation, his attitude to his own health and the health of others. Creating a positive social and psychological climate in the School for Health are provided through psychological and educational support of the educational process organization that promotes the development of

subject-to-subject relationship between the parties and forms the democratic foundations of School for Health management.

A significant role in the health-oriented work belongs to the organs of student self-government. One of their main tasks is to organize and to conduct extra-curricular and out-of-school activities aimed at the formation of value-based attitude to health, a love for the sport, spiritual and moral qualities of the individual.

The achievement of the intended result is influenced by the implementation of the pedagogical conditions of health-oriented activities of the School for Health. Analysis of scientific research can determine the following main pedagogical conditions of the School for Health activity: 1) the teachers' training to health-oriented activities; 2) the introduction of content and health-preserving technology of education; 3) ensuring social and psychological climate and social partnership.

Some other components also work towards the goal fulfillment - the formation of a value-based attitude to health and healthy lifestyle by creating educational health-preserving environment. One of them is a compulsory medical examination and monitoring the health of students. The health sister of the institution creates diaries or health sheets that contain the results of medical examinations of children, recommendations for the physical group for each student and the height of the desk.

A compulsory condition for the creation of a health-preserving environment is a partnership between the School for Health and the relevant institutions and organizations for the implementation of health-preserving programs. Cooperation of research, public and medical institutions allow to create scientifically grounded programs and work plans, to conduct monitoring studies of the health status of all participants in the educational process.

Effective-procedural unit includes the diagnosis and monitoring of health-oriented activities and the procedure for diagnosing the stages of development of an educational institution as the School for Health proposed by the authors [2]. The diagnostic stage is very important as it gives an opportunity to understand the value of a healthy lifestyle, makes you think about the health problems. This allows developing individual corrective programs, to involve parents in the problem of evaluating the functional abilities of the child's body or deviations from the norm.

Annual monitoring of health-oriented activities allows observing the state dynamics and assessing the effectiveness of the developed corrective measures, timely detecting and correcting the disadvantages. The directions of monitoring of health-oriented activities include:

- the analysis of the structure and dynamics of the students' illnesses (annually according to in-depth medical examinations);
- the level of mental health of the person (questionnaires and surveys);
- the level of comfort of the educational environment (factors influencing the occurrence of physical and emotional overload, which lead to deterioration of the physical and mental health of students, are studied);
- the level of physical development (diagnostics of physical and mental capacity at the beginning and at the end of the academic year; identification of mechanisms for adaptation to the educational process).

The result of the work of the School for Health is the creation of a health-preserving educational environment and an increase in the level of the formation of a value-based attitude towards health and healthy lifestyle habits. A long-term result is considered to be the physical, mental, social and spiritual health of students during their adulthood.

## **Conclusion**

Consequently, the name of the National Network of Health Promoting Schools should correspond to the changed name of the European Network, namely the National Network of Schools for Health. An analysis of the models of Schools for Health in Poland, the Czech Republic, Hungary and Russia showed the need to develop new Schools for Health model in Ukraine. The research and creative implementation of the European experience of Schools for Health in the field of health-oriented activities allowed developing and offering the pedagogical community a School for Health model for Ukraine. This model is based on the theoretical basis of environmental, holistic, personality-oriented and competent approaches; and composed of three blocks: theoretical, content and procedural and effective one. The purpose and objectives of the School for Health model are implemented through the components of the content and

procedural block It includes a creation of a health-preserving educational environment, which involves spatial and substantive sufficiency; content, forms and methods of the formation of the value-based attitude to health; communication of subjects of educational process and provision of pedagogical conditions of the healthcare activities: 1) training of teachers for health-oriented activities; 2) the introduction of the content and health-preserving technology education; 3) ensuring social and psychological climate and social partnership.

It is also believed that the activities of the National Network of Health Promoting Schools need the intensification and implementation of current developments of the pedagogical science.

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**THE NARRATIVE MODEL OF THE ENGLISH NOVEL OF THE EIGHTEENTH  
CENTURY (BASED ON THE WORK OF HENRY FIELDING “THE HISTORY OF  
TOM JONES, A FOUNDLING”)**

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**Abstract.**

The article is devoted to naratology as a branch of literary knowledge, which expanded the scope of studying literary work in the late 60's of 20<sup>th</sup> century. It is noted that the narrative discourse of any text reflects the author's conception through the narrative structure, and also is an important indicator of the manifestation of the form-content. An illustration of the theoretical positions viewed in the article is the narrative model of H. Fielding's novel "The History of Tom Jones ...", meanwhile the study allows us to look at this work from the point of view of forming the author's writing style as a bright representative of the Age of Enlightenment.

**Key words:** naratology, forms of narration, narrative model, narratological origin of artistic work

Naratology as a new branch of literary knowledge that greatly expands the scope of the study of artistic work, declared itself in the late 60's of the 20<sup>th</sup> century, diversifying approaches to the study, analysis and interpretation of literary texts and becoming one of the perspective directions of contemporary literary studies in the study of narrative strategies in national literatures of different eras.

The main theoretical points of the naratology are formed by the French semiotics (K. Bremen, A. G. Greimas) on the basis of a critical revision of the structuralist model of the worldview and

understanding of art from the point of view of communicative ideas about its origin, as well as the basic concepts of the theory of the narrative of the beginning of the 20<sup>th</sup> century, in particular the formal school (B. Shklovsky, B. Eikhenbaum, V. Propp), the principle of dialogicity of M. Bakhtin, the structure of the myth of K. Levy-Strauss, the Anglo-American typology of narrative techniques (P. Lobbock, N. Friedman, etc.), the German combinatorial theory (Z. Lybfried, V. Fuger, F. Stantsel, V. Kaiser), structuralist studies: L. Doljahal (Czech Republic), K. Bartoszynsky (Poland), J. Lotman, B. Uspensky (Russia), and others.

Consideration of the naratological nature of the work of art as an act of communication dramatically changed the established scientific ideas about the components of the artistic structure - time, space, plot, composition, image, etc.

The interest in naratological problems in foreign science is quite potent, as evidenced by the weighty works of V. Schmid, J. Zheno, J. Zhenetta, P. Chudakov and many others. Significant achievements of contemporary Ukrainian literary criticism can be considered the emergence of O. Tkachuk's "Narathological Dictionary" (2002), scientific works and monographs on problems of naratology (O. Kaplenko, V. Syuk, V. Polischuk, S. Siverska, M. Luchytska, V. Ostapchuk , M. Garapko, etc.), as well as a number of candidate and doctoral theses: Olga Papusha ("Narrative of children's literature: the specifics of literary discourse", 2003); Alla Koroleva ("Lingvo-poetic and narrative codes of intimization in the artistic text (based on the material of Ukrainian and Russian prose of the second half of the 19<sup>th</sup> century - the first half of the 20<sup>th</sup> century", 2003); Galina Kharkevich ("Reflection of the status of the character's anxiety in English language literary prose: semantic-cognitive and narrative aspects, 2007); Tetyana Cherkashina ("Narrative features of literary and biographical prose: the author and the reader", 2007); Olesya Petrus ("Peculiarities of the narrative strategy in Peter Akroyd's biographical prose", 2008); Lidia Matsevko-Bekerskaya ("Narrative strategies of little Prose (on the material of Ukrainian literature of the late 19<sup>th</sup> - early 20<sup>th</sup> centuries), 2009), Nadiya Petritschenko ("Narrative-genre specificity of Ukrainian, Polish, Russian prose of the first half of the 19<sup>th</sup> century", 2010), and others.

The use of naratological approaches is very broad: from a new way of communicating the reader with the text to the perception of naratological concept as a self-sufficient method of literary criticism.

First of all, the naratological approach involves a communicative understanding of the nature

of literature, taking into account the author's strategy in the choice of textual technologies. Narrative discourse of any text is an important indicator of the form of content manifestation, reflection of the author's concept through a certain narrative structure.

The linguistic structure of the prose work can give invaluable information about the time of creation of artistic text, the aesthetic preference of the author, the prevailing philosophical discourse, etc. In this article we focused on the legacy of the prominent representative of English literature of the mid-17<sup>th</sup> century and his most famous novel, «The History of Tom Jones, a Foundling».

Henry Fielding (1707-1754) is an outstanding representative of the English realism of the 18<sup>th</sup> century, the founder of a European realistic novel, and in 47 years, given to him the fate, he wrote 27 plays (one of which was posthumously printed) and 3 novels.

Considering, in particular, the novel by G. Fielding "The History of Tom Jones ...", we will try to look at the narrative model of this work more broadly, from the point of view of forming the author's style of the writer as a bright representative of the Age of Enlightenment. Consequently, we have reason to determine the main narrative model of his novels as "enlightening".

It must be borne in mind that G. Fielding called himself "the creator of a new type of literature," denoting the genre of his novels as "a comic epic in prose." He relied on the literary traditions of Samuel Richardson (1689 - 1761), who, although he was a coeval of H. Fielding, laid the foundations for a socio-psychological novel, affirming the epistolary form of the narration. It is the three most famous novels of S. Richardson ("Pamela, or Rewarded Virtue"(1740); "Claris, or the story of a young lady" (1747-1748); "The History of Sir Charles of Grandison" (1753)) fixed for the descendants the sentimentally-didactic style as the main indicator of the enlightening narrative structure.

G. Fielding, in his own words, while trying to immitate Cervantes, instead, created a "comic epic in prose," expanding the moral and philosophical content and asserting the genre of "history". It is interesting to immediately note that from the word history begins the name of not only one of the novels of S. Richardson ("The History of Sir Charles of Grandison"), but also of two novels by G. Fielding: "The History of the Adventures of Joseph Andrews and his Friend, Mr. Abraham Adams", 1742), "The History of Tom Jones, a Foundling", 1749).

By creating a satirical narrative in "The History of Tom Jones ...", G. Fielding deliberately makes his main character look like Don Quixote. This is evidenced by the presence of Patricia as a "weapon-bearer" for Tom Johns, very similar to Sancho Panz; separate appeal of G. Fielding to the image of Don Quixote in the play "Don Quixote in England" (1734); the beginning of the genre of the novel of "great road", etc.

Let's recall that most Western researchers consider the first true novel in the history of world literature the work of Cervantes "Don Quixote" [3, 23]. American professor Harry Lewin notes that the genre of the novel began its existence quite freely by mocking and overthrowing its predecessor. "And Cervantes, contrasting the everyday reality of the developing city to the chivalrous ideals of the collapsing castle, created an archetype for all novelists and future realists" [10, 70-71].

Produced by G. Fielding narrative model, mentioned in these two novels, confirms the writer's attempt to establish a realistic narrative. The signs of realism are the depiction of a real (typical) person in real (typical) circumstances. Therefore, the main task of the author-realist is to depict the artistically credible narrative discourse of a realistic work. It was the desire to create a credible realistic narrative that required from G. Fielding content and language searches and innovations in relation to narrative structures.

The formation of Fielding as a novelist happened under the influence of his experience as a feuilletonist and satirist of the periodicals "Sincere Patriot" and "Jacobin Magazine". This correspondent practice helped to skilfully conceal socially-defamatory motives under the satirical and ironic scenes of works.

It is worth bearing in mind that G. Fielding treated writing as a profession more than seriously. His aunt, Mary Montague, was a well-known writer, while still studying at the Eton College, he began his writing career as a playwright, and earned himself a living by arranging plays. He was a student of Leiden University, studying classical literature. We recall that he read the ancient literature in the original language, knowing Greek and Latin languages. In 1730, three plays by this author were successfully put at the London Drama Lane Theater.

An epigraph to the novel "The History of Tom Johns, a Founding" taken by the author from "Poetry Art" by Horace (141-142 verse; free translation of the introductory poems of "Odyssey"

by Homer) - "Mores hominum militum vidit" ("I saw the customs of many people"). The placement of such an epigraph on the title page of the work confirms both the knowledge of Latin by the author and the desire to create a social and everyday comic epic, an encyclopedia of English life of that time. In order to realize this goal, the genre of the novel was best suited.

M. Bakhtin argued that the novel as a genre is unique, because it is a manifestation of time, "the best expresses the tendencies of the formation of a new world, for it is the only genre born of this new world and in everything relative to it" [1, 98].

D. Zatonsky notes that the duality of the structure of the novel, when it is necessary to describe the completeness of the world, but this multifaceted material is organized around an individual private event, gives the novel as a genre a "continuity of motion" [3, 21]. Just due to the creation of a typical hero of his time, taking into account changes in society, "the novel to the impossibility precisely" copies "the world itself, society itself, man himself, simultaneously reproducing and modeling them, evaluating and creating" [3, 21].

The feature of the English novels of the 18<sup>th</sup> century was the desire of the individual for personal gain, the achievement of a career that coincided with the historical requirements of society at that time. According to D. Zatonsky, this could quickly be achieved only by "upstart" [3, 237]. The novel "The History of Tom Jones, a Foundling" is a work about an "upstart".

French prose writer Michel Boutor, referring to the surnames of AR Lesage, P. de Marivo, G. Fielding, noted that in the works of the 18<sup>th</sup>-century artists, the main theme is the "upstart" [8, 679]. Accordingly, the author of the text creates a narrative about how this hero has risen so high.

An American writer of the 20<sup>th</sup> century, Ralph Ellison, believed that only in the 18<sup>th</sup> century appeared the need for new artistic forms, because the characters (and, accordingly, assuming that the people of that time as well - K.T.-T.) were attracted by the thirst for change [9, 63]. Before the 18<sup>th</sup> century, according to R. Ellison, a person felt "home" in the environment that seemed stable and in a well-organized world [9, 63]. This idea is supported by the modern Ukrainian scientist D. Nalyvayko in the book "Art: directions, trends, styles", expressing the thesis that the existence of canonical styles (adhering to the style of "great epoch as a single, general, compulsory norm for artists) was based on the static forms of social life, that is, in the absence of a sense of dynamics and variability in the existence of a person [6, 48]. We can assume that from

the 18<sup>th</sup> century in the minds of writers, masters of literary works there is a sense of "the dynamics of life and human viability." Such tendencies of anti-normality on the verge of the 17<sup>th</sup> – 18<sup>th</sup> centuries are stated in their works by O. Pope ("The Experience of Criticism"), O. Sumarokov ("The Epistolus of Versification"), G. Lessing ("Hamburg Drama").

The poetic-stylistic features of Fielding's novel "The History of Tom Jones ..." have partly been the subject of research by scholars, but in our work an attempt is made to comprehensively examine the work from the standpoint of narrative discourse. This specifies the narrative model of the genre of the novel.

We will single out only the general indicators of the enlightening narrative model of the novel.

Enlightening narrative model involves several obligatory elements:

- Fabulous positive final (the good wins). The storyline - a good almost fairy-tale hero (geek) wins the powerful representatives of the evil forces. The literary descendants successfully borrowed this structural element from G. Fielding (T. D. Smolet, O. Goldsmith, V. Scott, C. Dickens, etc.).

- The main idea is to educate readers, and for this purpose it is appropriate to create a narrative of life, adventure, and sometimes even outrage (as in G. Fielding's satirical story "The Life of Mr. Jonathan Wild the Great", 1742) We recall that the novel as a genre became the center of literary life only in the 18<sup>th</sup> century, giving the writers space for the instructive and semantic-didactic tale.

- The pathos of enlightenment is in the pursuit of human self-improvement (it is used on purpose in the novels of the Enlightenment age obstacles, which the hero must overcome, are almost grotesque, creating a situation of isolation, loneliness of the character).

- According to D. Zatonsky, enlightening literature was primarily related to philosophy, "a pre-determined moral assessment of being applied to the ideal of a" natural person "and limited to rational principles of" civil society "[4, 57]). Consequently, the narrator in the enlightening novel, by all possible means, had to convey the image of a perfect "natural person", guided by rational arguments of reason in his actions and defending the principles of civil society.

- The moralization of enlightening novels (following O. Balzac - Collected Works, T. VIII, pp.

421-422) can be regarded as those for the sake of which all the works are re-read - for the sake of "details". The indication of the concise content at the beginning of each chapter in G. Fielding's novel "The History of Tom Jones, a Foundling", stands ahead of events and creates the effect of full predictability. These chapters become interesting exactly due to "details", tasting descriptions, reflections, thoughts of the narrator. Let's accept the lyrical assumption that the life of each person can be reduced, as in the enlightening instructing novel, to the list of details, and the rest is only a biography. The subject of this work by G. Fielding is "biography" of Tom Johns, and the rest is an entertaining world of details for which the stories are listened and the novels are read.

Each of these points involves deepening into the text of the novel by Henry Fielding, providing evidence, systematizing the material on the indication of the narrative model of the English enlightening novel. That is what our further scientific researches will be devoted to.

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## **INNOVATING DIRECTION OF HUMAN CAPITAL MANAGEMENT SYSTEMS IN THE PUBLISHING INDUSTRY**

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### **Abstract.**

Contemporary transformations of the national macroeconomic environment require the search of innovative approaches to manage the human capital as a key labor resource in the publishing industry, which defines the strategy of its development and insures success in the common business.

**Key words:** human capital, management systems, publishing industry.

The concept of human capital was put forward by the American researcher, the 1992 Nobel Prize winner in Economics Hary Stanley Becker. Human capital is the set of available knowledge, competences, skills, motivation etc. According to G. Becker, investments in human capital are costs spent to obtain a university degree, qualifications, to accumulate certain experience as well as the costs of health care activities. As a rule, capital investment in human capital is carried out in order to earn income, taking into account the rate of return adopted by the investor in accordance with the norms of efficiency. Moreover, the return on investment in human development is on average greater than the return on economic capital [1]. Human capital is an established and supportive fund of physical health, knowledge, skills and competences, as well as potential opportunities and motivation, which it is appropriate to use in the field of economic activity in order to obtain the appropriate results that will meet the needs of the

national economy and society. Human capital should favor to increase productivity and economic efficiency in the macroeconomic environment. Having a huge professional human potential, however, our country cannot be compared to any industrialized country of the international environment taking into consideration the level of well-being of the vast majority of the society. The basic aspects of the above-mentioned position are related to the quality of regulation and management of professional opportunities of representatives of the national society [4]. According to the basic principles of the modern theory of human capital, human capital implies the totality of knowledge, skills, abilities, motivation and energy acquired in the course of training and practical activity, possessed by a person who uses them for a certain period of time in economic activities in order to obtain relevant results. Human capital is an asset that converts acquired human potential into benefits and commercial aspects of economic entities, socio-economic aspects for the state, and status and material effects for human potential carriers in the national macroeconomic environment [3]. A well-known Ukrainian scientist, Professor Eduard Kuznetsov, argued that management capital is a certain dominant force that forms a higher level of human capital in the national macroeconomic environment. It is effective management that creates an innovative format for strategic development of the national economy and its segments. In the context of intensified globalization processes and European integration, the human capital of the publishing industry, as a strategic resource, must have an innovative orientation of development, because in the process of work, absolutely all operating conditions in the industry are focused. Human capital management has a significant influence on the strategy of the development of the publishing industry in the national economy and identifies the following systemic issues. Firstly, it is necessary to regulate the level of labor costs associated with publishing and as well as to optimize them; secondly, it is necessary to increase the financial resources related to the improvement of the work efficiency and its positive impact on the output of the publishing industry, and thirdly, it is necessary to take into account the influence of the social factors of the internal macroeconomic environment of the country on the strategic development of the publishing industry. The economic mechanism of human capital management in the publishing sector of the national economy is an instrument of operational, tactical and strategic influence on the sectoral economic system, also providing a focus on effective management decisions in unstable conditions of national economy development. Human capital should work within the system of capital cycle in the publishing industry as well as maximize the

results of economic activity. Thus, a quantitative segmental assessment of human capital utilization taking into account linear and functional aspects, is imperative.

The index of the use of human capital in the publishing industry implies the definition of the following indices:

- a cost index that shows the total labor costs divided by the full-time equivalent of an able-bodied person;
- an income index that shows the income earned secured by the appropriate investment in human capital
- performance index that shows net financial result divided by full-time equivalent, which is calculated as the average payroll count in the publishing industry.

In today's transformational environment, priority should be given to specialists in the publishing industry who have the appropriate competency abilities, who handle innovative technologies of managing an employee's career-oriented capabilities who is involved in the economic activity of the publishing industry.

The current principles of the strategy of development of the publishing industry of the national economy also imply a change in the concept of human capital management in the industry:

- formation of a personnel policy and strategy, which is aimed at the growth of socio-economic results within the framework of economic activity in the industry;
- introduction of modern models of remuneration in the publishing industry;
- application of social-motivational mechanism and modern methods of stimulating the activity of personnel in the publishing industry;
- introduction of modern principles of personnel building and development in the industry.

To monitor the functioning and development of human capital in the publishing industry, a balanced scorecard that includes the following interrelated parameters is proposed:

- structure of sectoral human resources, that is the value of human resources expenditures,

the coefficient of turnover, the ratio of security;

- organizational and economic efficiency includes income, net financial result, total income, value added, payback ratio of investments in sectoral human capital;

- financial expenses: wages and other compensatory expenses;

- social security that is social payments at the expense of the relevant sources;

- staffing, that is the cost of hiring manpower from relevant sources;

- staff turnover, that is the number of redundancies for various reasons in the industry;

- sectoral development of human capital, which means the cost of training or retraining, the number of employees who have been trained, retrained or who have been given an advanced training.

In the publishing sector of the national economy, labor resources must effectively contribute to the growth of socio-economic performance that affects the development of the country. In a large number of publishing entities, a large number of staff are indifferent to the results of business activity and they sometimes resist innovations which perturb their usual work pattern. It is commonly known that only motivated staff can effectively operate and create added value and be of social importance in a macroeconomic environment. The identified aspects form the core objective of an effective human capital management system to provide a strategy for the development of the national economy's publishing industry.

To diagnose the effectiveness of managing decisions related to the sectoral human capital, it is advisable to use an index that characterizes the financial performance of human capital. The index provides analytical information on the effectiveness of financial resources invested in human capital and it is defined as the ratio of an entity's total income to the total costs related to staff involved in the publishing industry.

The use of the index of human capital efficiency in the management of entities of the publishing industry should focus on the creation of the system of internal economic relationships based on the rationalization of economic processes, the optimal use of resources, the use of modern fixed assets and the introduction of innovative technologies, updating the product range as well as better performance of all segmental components of the publishing industry. Only this

basis makes it possible the formation of the necessary preconditions for the effective use of human capital, which greatly influences the strategic development of the industry.

Defining forms, models and methods of management of sectoral human resources, as well improving the motivational mechanism in the current conditions of the national economy make possible achieving the strategic goal of the development of the publishing industry in the national macroeconomic environment.

The major set of measures aimed at better performance of the publishing industry are related to the issues of reconstruction or modernization of intra-branch economic activity and addressing local issues related to the rationalization of labor processes, innovative approaches of the organization of work, professional development or staff retraining, digitalization of personnel policy, etc.

The defined aspects theoretically prove that the mechanism of human capital management in the publishing industry is a significant socio-economic instrument of multifaceted influence on the system of ensuring the strategy of development of the publishing industry of the national economy.

In the national macroeconomic environment, due to the low level of digitization of the building and maintenance of regulatory support, its limitations and time delay, accounting units and degree of accuracy, it is almost impossible to differentiate the scale of use of individual segmental components of human capital in the publishing industry in the intensified globalized environment and international labor migration. However, the significant share of labor costs in the primecost of publishing production requires functional control of the process of their multifactor formation and minimization, taking into account industry features.

A prerequisite for effective management of human capital in the publishing industry is the application of the principle of adequate consistency. The use of a systematic approach shows the possibility of scientifically based synthesis of individual functions of human capital management into a single whole, taking into account the influence of internal and external factors of the macroeconomic environment.

The adequate system approach enables to conduct the study of the process of human capital management, taking into account not only the individuality of each element, but also their

interconnected functioning.

The most important features of the human capital managing system in the publishing industry are:

- the availability of different components;
- the availability of interconnections between the components of the system;
- the presence of a specified goal, which is the beginning of a system that connects and defines the interaction between components.

Thus, an adequate human capital managing system in the publishing industry implies the set of interrelated and, at the same time, different components that affect the effective performance of the industry.

Therefore, in the conditions of further development of market relations, human capital management in the publishing sector of the national economy must mean the creation of a rational, reasonable, holistic and uninterrupted economic system having certain targets and interconnected components that must adequately respond to the globalization macroeconomic processes.

The application of a systematic approach to the management of human capital in the publishing industry enables to conduct a comprehensive research and examination of an asset managed, to determine the basic tasks of the managing process with the execution sequence being determined, and to build an appropriate efficient managing system.

With a combination of a systemic and a contingency approaches, the efficiency and effectiveness of the human capital management process is significantly enhanced by evaluating relevant indices of economic activity in the publishing sector of the national economy.

Thus, the innovative focus of the human capital managing system in the publishing industry is realized through a composite managing mechanism that is interlinked with the strategic goals of the industry and is focused on achieving the chosen development strategy.

The compositional mechanism of human capital management in the publishing industry is a multi-level targeted system consisting of the relevant elements of the management of the publishing industry.

The process of human capital management is a controlling system and is considered as a set of the following aspects:

- the controlling process characterizes it in static dynamics;
- compositional management mechanism consists of goals, tactical targets, operational tasks and activities;
- methodological tools;
- a set of modeling management measures;
- information and analytical support;
- legal regulation;
- functional tools (monitoring, diagnostics, evaluation, analysis, control and audit);
- segmental association that characterizes the controlling system in relative statics, considering the structure, qualitative and quantitative parameters etc .;
- models for improving the human capital managing system in the publishing industry.

When considering the structural components of the composite mechanism of human capital management in the publishing industry, it is necessary to determine the parameters that characterize the main strategic goal of the industry.

In our opinion, this parameter can be the index of human capital efficiency, which is calculated as the ratio of total income to the amount of human capital. It shows the amount of total revenue that the publishing industry receives from each hryvnia, which determines the human capital in the industry. The regulation of this index will maximize the total revenue in the publishing industry.

The basic focuses of the compositional mechanism of human capital management in the publishing industry are:

- attraction of professionally qualified labor resources;
- optimization of managing staff;
- formation of the optimal number of production personnel in the industry;

- ensuring the socio-economic efficiency of the work of staff through constant and objective evaluation of the results of their work as well as professional competence and certification;

- purposeful planning of development and reproduction of human capital in the publishing industry through training, advanced training, formation of labour reserve and other models that ensure the adequacy of human capital in the strategy of the development of the publishing industry of the country;

- innovative forms of staff motivation;

- investment security and support;

- socio-economic development of the publishing industry and its structural elements, economic and management processes, organizational culture and other indicators that stimulate the effective use of human capital and its reproduction in the publishing industry of the national economy.

The conceptual model of the composite mechanism of human capital management in the publishing industry is formed in Fig. 3.1. The compositional mechanism is the coordination of the relevant structural components, which are interconnected by logical horizontal and vertical links, which provides high efficiency and effectiveness of the current mechanism in order to focus on the strategic goal of human capital management in the publishing industry, which in turn, provides an opportunity to apply a strategy for the development of the publishing industry of the national economy.

The conceptual model of the composite mechanism of human capital management in the publishing industry, like any holistic management system, includes certain principles, functions and corresponding indicative regulatory parameters.



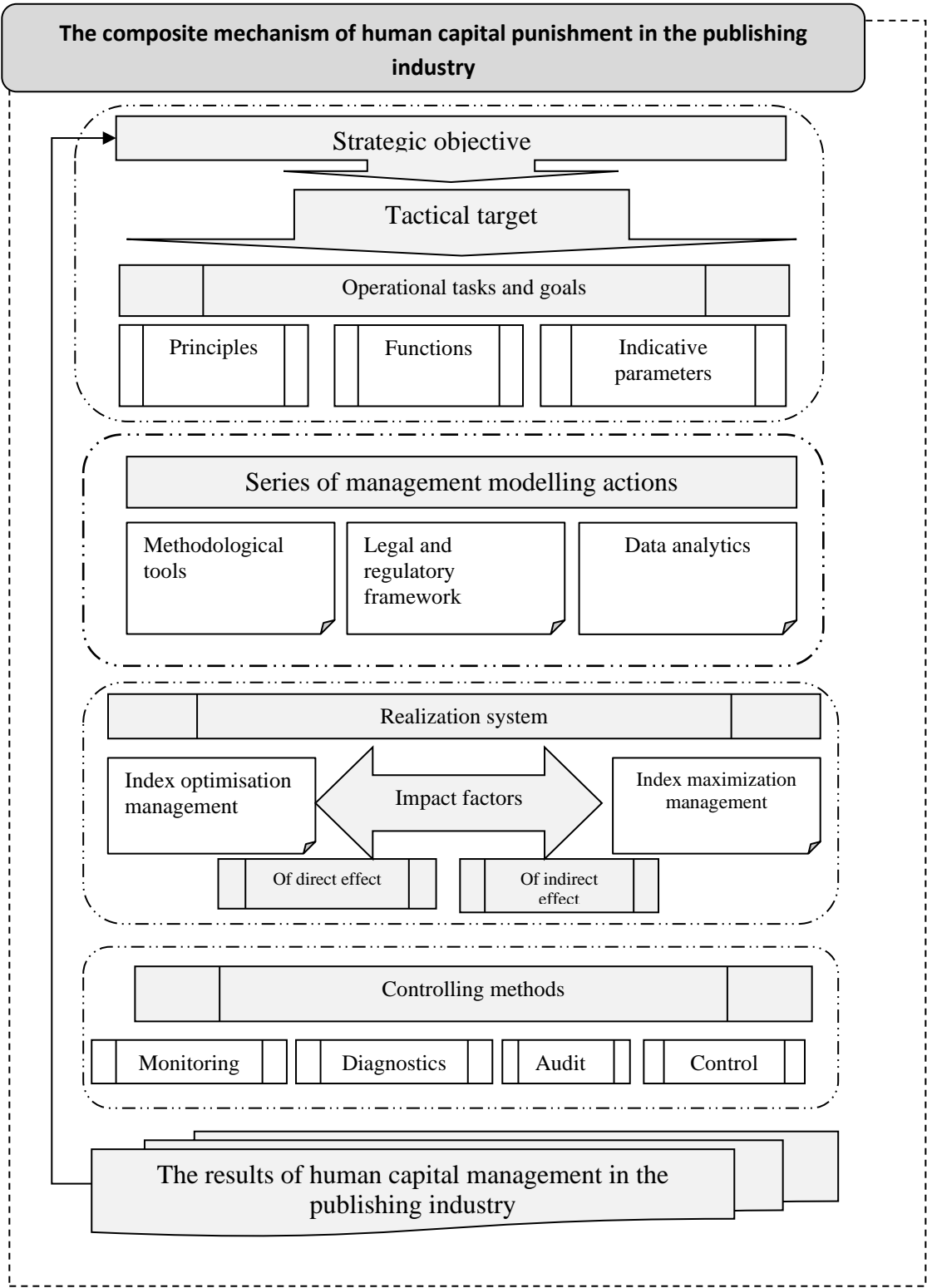


Fig. 3.1. Conceptual model of the composite mechanism of human capital management in the publishing industry

Functional focus of the human capital management mechanism includes:

- organization of staff work;
- organization of remuneration;
- organization of stimulation and motivation;

- organization of vocational training, retraining or advanced training;
- organization of labor relations;
- organization of social support for employees;
- work planning and valuation, accounting, control, analysis and evaluation;
- intersectoral and intra-sectoral staff cooperation.

It should be noted that the methodological toolkit is used in the form of certain parameters and standards. Planning, accounting, control and analysis indicators must be interrelated, which is explained by the unified focus of the functions of the composite human capital management mechanism in the publishing industry.

The essential properties of the indicators that characterize the human capital managing system in the publishing industry are:

- the compliance of the indicators with the tactical goals and operational tasks of the human capital management system in the industry;
- the optimal number of indicators;
- the compliance of accounting information indicators;
- the ability to use indicators at all managing levels;
- synergy of individual indicators, which is carried out through emergence.

The basic properties of the formed composite mechanism of human capital management in the publishing industry are:

- focus on increasing the efficiency of economic activity in the publishing industry by reducing costs and increasing productivity;
- consistency of interests of the internal economic system as a whole and of individual employees based on organizational functions of management;
- objectivity, validity and reasonableness of human capital development in the industry;
- flexibility to new conditions of economic management and development of productive

forces in the national macroeconomic environment;

- variation modeling of the operation and development of labor resources in the publishing industry;

- progressiveness, which emphasizes the dynamic development of the publishing industry and the sectoral human capital.

The variety of operational challenges for the management of human capital in the publishing industry can only be solved with a comprehensive approach.

In the publishing industry a special attention should be given to the improvement of the quality of human capital, that is, the level of professional qualities, personal and psychological characteristics and staff competences that meet the requirements of economic activity in the publishing industry.

Achieving the optimum level of human capital in the publishing industry is only possible with personnel management being well-established which has its own distinctive features and properties under market relations.

The strategic component of the formed composite mechanism of human capital management in the publishing industry should be the investment and innovation component, which gives the opportunity to generate the proper investment and innovation potential in the human capital management system of the publishing industry.

Investment and innovation support for the development of human capital in the publishing industry is the most efficient as it enables to obtain an integral socio-economic effect of capital investment taking into account the current trends in the use of potential labor resources.

Investment and innovation support for human capital in the publishing industry should have a vertical direction:

- of an individual nature that provides for the formation of the human capital of an individual entity of the publishing industry;

- of an intra-industry scale, which ensures the formation of human capital in the publishing industry of the country;

- of the cross-sectoral scale, which ensures the formation of human capital of the publishing industry as well as the related industries of the country;
- of the regional scale, which ensures the formation of human capital within the relevant geographical segment;
- of the national scale, which ensures the formation of human capital in the national macroeconomic environment.

Thus, the investment and innovation component of the composite mechanism of human capital management in the publishing industry, in the conditions of functional transformation of the country's macroeconomic system, is a powerful factor that provides the strategy for the development of the publishing industry.

The essential manifestation of changes in the macroeconomic environment is the promotion of human beings at the center of the reproduction process, that is why human capital is the dominant factor of economic growth and development, it determines the pace, level and quality of strategic development of both an individual entity and the relevant segment of the national economy. However, one of the most difficult challenges of modern management is the effective use and further development of human capital.

In Fig. 3.2 the linear dependence of the strategy of development of the publishing industry of the national economy and the use of human capital is formed.

The quality of human capital significantly influences the positive results obtained due to its use in the economic process, which in turn influences the strategy of development of the publishing sector of the national economy.

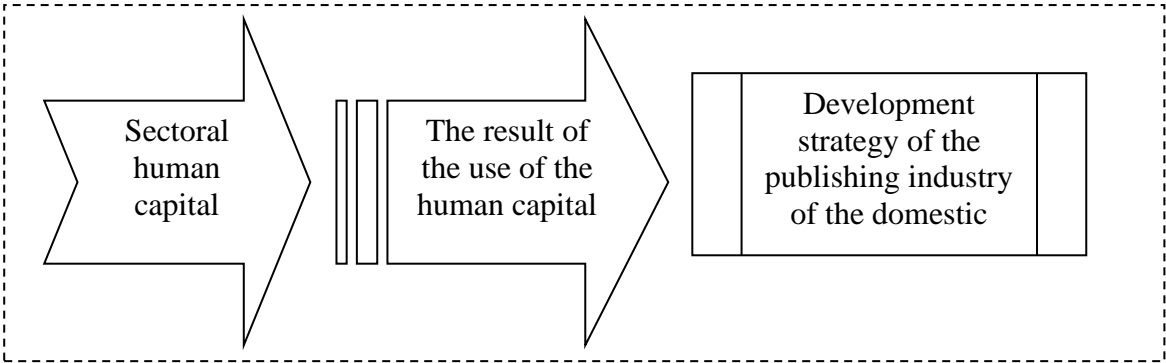


Fig. 3.2. Linear dependence of the strategy of development of the publishing industry of the national economy and the use of human capital

Motivational mechanisms that must fit the modern paradigm of management and regulation have a significant influence on the human capital management system in the publishing industry. Due to this, it is necessary to investigate and distinguish a scientifically grounded approach to the motivation to work in the publishing industry, which takes into account the modern peculiarities of employee psychology. The importance of a properly constructed motivational mechanism in the publishing industry is conditioned by the dependence of the economic end results on the quality of human capital management.

The motivational mechanism in the publishing industry is formed on the basis of both classical and modern theories of labour motivation.

The term "motivation" was first introduced by Arthur Schopenhauer in his paper "Four principles of the sufficient reason" in 1900-1910. Motivation in its evolution has passed certain historical stages - from "whip and carrot" policy (punishment and reward policy) to "the concept of human resources" (the perception of an employee as a key person in the economic activity, on which its final results depend [5].

M. Mescon, M. Albert, F. Hedowry define motivation as the process of encouraging oneself and others to pursue the goals and objectives of the entity [6].

In our view, motivation is an interconnected purposeful managing activity that ensures the efficient use of human capital in the business system in order to obtain the desired results. Motivation drives labor to achieve personal and economic goals.

In the publishing industry, it is necessary to apply parallel motivation across the range of motivating factors, from higher to lower, which enables an employee to fulfill all the categories of needs stated in Maslow's theory. When constructing a motivational mechanism in the publishing industry, it must be borne in mind that each individual has its own value system that defines a unique set and ratio of motivating factors and actions.

The development of effective intra-industry motivational programs is aimed at encouraging workers to act not only by taking into account their socio-economic needs in the remuneration system, but also by generating behavioral motives that affect the economic

outcome. Thus, the cognitive-value approach to managing the publishing industry is implemented.

Cognitive-value approach reflects a person's awareness of the system of knowledge in the field of management, operating technologies of industry-specific management, the formation of systematic, analytical and flexible management thinking, knowledge of psychological and social needs of employees, the orientation in analytical information retrieval systems, individual professional and psychological outlook and ability to utilize potential staff capabilities.

Thus, the current system of motivation in the publishing industry should include such categories as socio-economic and intercultural space, development of subjective potential of employees of the industry.

When constructing a motivational mechanism in the publishing industry, one should also take into account the fact that each employee has their own modelled system of values and the ratio of motivating factors and actions.

The main sectoral factors of motivation are:

- any form of remuneration;
- insurance services;
- material services;
- participation in receiving income and profit;
- concessional loans.

In the publishing industry, it is necessary to apply a social sectoral motivational package, consisting of a wide and flexible range of motivational tools, among which each employee has the right to choose the appropriate motivational tools that are relevant for them at present. Non-material motivators that do not require adequate financial support have a great influence on the social and psychological climate in the publishing industry.

The social sectoral motivational package consists of the following elements:

- participation in management and decision-making;

- opportunities for training, advanced training and retraining;
- appropriate career building opportunities;
- participation in the distribution of economic output;
- concessional loans etc.

A necessary condition for the operation of an effective human capital management system in the publishing industry is motivational monitoring, diagnosis, audit and control, which provides an assessment of the motivational potential of human capital; the skills of managers regarding employee activation are determined, the employees' active needs in the sphere of demotivation, which require prompt influence and regulation, are identified. The results obtained can be used to formulate a strategy for the development of the publishing industry of the national economy.

The human capital management system in the publishing industry is influenced by two groups of factors: the external and the internal ones. External factors are political, legislative, regulatory, regulatory, socio-cultural, international, technological, military, geographical, environmental, etc. Internal factors are professional, organizing structural, economic, industrial, corporate, administrative, operational, creative, innovative, investment ones, etc.

An important element in shaping the human capital management system is the mechanism of the professionalization of managing activities, which is based on managerial professional competence and practical experience.

The professionalization of managerial activity, in its general manifestation, is defined as the evolvement of an individual into a professional manager, from the moment of his professional choice until the moment of quitting it [7].

Professor E.A. Kuznetsov considers the professionalization of the managerial activity from the standpoint of a holistic continuous process of the evolution of a professional's personality, which begins from the moment of choosing a future profession and ends with the termination of active employment [2].

The professionalisation of managerial activity in the publishing industry is influenced by the following factors:

- the structure of management education and educational process;
- legislative and regulatory support;
- international standards of professional activity;
- management proficiency at all management levels of the publishing industry;
- managing proficiency of public institutional management;
- management proficiency of interbranch management;
- practical experience, etc.

The quality of a manager's professional training is the key to effective implementation of the managing process, enhancing the competitiveness of an entity of the domestic economy, and therefore the managerial capital itself [7].

Thus, a well-founded comprehensive study shows a change in the management paradigm and in the education paradigm. Previously, the development of the industry was considered as a paramount management task while training was regarded as a means of solving a specific problem. With the modern approach to management, it should be stated that training is the basis of the strategy of the development of the publishing industry of the national economy.

It is vocational education that seeks to provide human capital with such fundamental support that will enable it to easily and quickly acquire the necessary set of skills, knowledge and competences that are required by today's transformational contexts characteristic of the national macroeconomic environment.

In the publishing industry, it is necessary to create a creative climate that broadens the field of action among employees, frees them from excessive formalism and motivates them to innovate, which will ensure the implementation of the industry development strategy.

The publishing industry of the country needs a new strategy for the formation of sectoral human capital, which is based on the current problematics of modern management. A person is a purposeful, creative and self-organized personality whose motivation is based on the principles of metamotivation.

Metamotivation is the satisfaction of the upper needs of an individual self-realization and



self-expression, the improvement of socio-economic status, which are considered as higher values. Therefore, vocational training should be aimed at forming a creative personality as a basic resource for economic growth and development strategy for the publishing industry.

Modern forms of educational process include consulting, training, mentoring, coaching. Coaching is a system of vocational training that seeks to reveal the potential of an individual to reproduce intellectual capital which elements are collaboration, support, strategic thinking, self-motivation and innovation.

Coaching is a method of consulting and training, in the process of which a person called "coach" helps a student to achieve a life or professional goal. Unlike mentoring, coaching is focused on achieving well-defined goals instead of overall development [8].

Team and individual coaching is aimed at increasing the level of responsibility, self-realization and metamotivation, providing continuous self-improvement and initiating changes in the publishing industry in order to improve management qualitative and quantitative results.

In this way, human capital management in the publishing industry forms ambiguous interrelated aspects:

- the regulation of the level of labor costs,
- the growth of financial resources to increase labor efficiency and its economic impact on economic activity.

In general, the costs of sectoral human capital are the following: acquisition (staff recruitment costs); labor incentive system (labor costs); preservation (motivation system); development (training costs, advanced training, retraining).

The evaluation of the effectiveness of a vocational training model should help achieve the main goal of identifying the reserves of maximum return on human capital.

Thus, the requirements of modern business processes dictate the need for active management of human capital as an internal workforce of the publishing industry, which determines its success, competitiveness and development strategy.

The developed conceptual model of the composite mechanism of human capital management in the publishing industry contains sufficient methodological, informational and

functionally orientated tools that provide a strategy for the development of the publishing industry of the national economy.

The innovative direction of the human capital management system should be one of the priority goals of the country's publishing industry development strategy.

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## CONCEPTUAL APPROACHES TO THE FORMATION OF STRATEGIC PRIORITIES IN THE FOOD INDUSTRY

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### **Abstract.**

The modern development of the food industry is influenced by transnational, geopolitical and internal challenges of increasing the openness of the national macroeconomic environment of the country and leads to strategic changes in the approaches to the development of segmental components of the industry, taking into account the systematic and integrated approach based on the concentration of appropriate resources.

Sectoral strategic management implies that its entities independently determine their key positions for the future, depending on the priority of goals and objectives. Sectoral strategic management is a type of management activity that implies the management by the authorized institutions of a system of homogeneous entities that form industry in a socio-economic complex of the national macroeconomic environment, taking into account all relevant external and internal conditions of their functioning. Strategic management provides the identification of key positions for the future, depending on the priority of goals and objectives.

**Key words:** food industry, strategic priorities, conceptual approach.

Theoretical and methodological aspects of the macroeconomic environment actors' strategic priorities formation in changing conditions were reflected in the scientific works of I. Ansoff, F. Kotler, M. Mescon, M. Porter, O. Pushkar, R. Fathutdinov, Y. Safonov, G. Grigoriev, O. Poberezets, Y. Melnyk and other researchers.

The practical experience of choosing strategies for the development of food industry entities shows that there are common, focused approaches to strategy formulation and a general framework within which strategies are fitting. Any strategy is the general direction of purposeful actions of the industry actors, the passage of which in the long term should provide solving the tasks that will achieve the strategic goals. This understanding of the strategy is valid only when considering it at the top level of sectoral management.

The process of choosing a sectoral strategy includes:

- an objective understanding of the current strategy of functioning and development of food industry entities;
- research of sectoral portfolio of business;
- the choice of strategy of the food industry entities and its evaluation.

An objective understanding of the current strategy for the functioning and development of

the food industry entities is important because it is not possible to make adequate decisions about the future without having a clear idea of the state of the object and what strategies it implements.

The main position of the sectoral strategic management is caused by the transition of the food industry entities into an open global space, which provides a sense of disciplining influence of the environment, which in today's international realities forms a decisive factor in the efficiency of the business in the industry. Objective clarification of the current strategy of functioning and development of food industry entities forces to conduct strategic research of the internal and external environment, as well as the obligatory consideration of the market factor in making informed management decisions related to the production and sale of food products.

As the practice of functioning of food industry operators shows, a system of sectoral management that is based on the achievement of current goals or short-term objectives in today's economic environment is inefficient and threatens economic security, both at the micro-level and at the macro level.

The current strategy of functioning and development of food industry entities should stimulate them to search for new technologies and forms of operational activity and to meet the requirements of innovation and investment development of the national economy and its structural elements.

A large number of scientists, including G. Mintzberg, M. Porter, V. Savchuk, and others, have studied the classification of strategies. The classification of strategies for the operation and development of economic entities differs in the set, number, and orientation of classification features.

Almost all scientists identify a list of basic strategies, but in some sources, they can be classified according to the life cycle of the business entity: a growth strategy that has intensity; a stabilization strategy that focuses on slow growth and market exit strategies.

A. Thompson further distinguishes the following classification features of strategies of macroeconomic entities:

- by the direction of transformation;
- by nature of influence;
- by complexity.

Taking into account modern economic theory and practice, the author offers a structured system of classification features for determining strategic priorities in the food industry, taking into account relevant aspects of the modern economy (Table 3.1).

Table 3.1

The structured system of classification features for determining strategic priorities in the food industry

Number in order	Classification features	Strategic priorities
1	2	3
1	By level in the management system	- Sectoral; - Intersectoral; - Corporate
2	By the degree of achievement	- Target; - Intermediate; - Partial

3	By the degree of factor influence	- Exogenous; - Endogenous
4	By functional criterion	- Production; - Financial; - Social; - Ecological; - Marketing
5	According to the properties of phenomena and processes	- Quantitative; - Qualitative
6	By life cycle stages	-Growth; - Retention; - Reduction
7	By directions of sectoral development	- Intensive growth; - Extensive growth; - Integration growth; - Diversified growth
8	By competitive position in the sectoral market	- Leader; - Follower; - Applicant; - Beginner
9	By direction of activities	- Operating activities; - Financial activities; - Investing activities; - Innovative activities
10	In terms of efficiency	- High income; - Minimal costs
11	By the degree of achievement	- Achievable; - Unreachable

It should be noted that the neoclassical theory that prevailed in the first half of the XX century systematically ignored the doctrine of the entity's development strategy because it did not recognize the individualization of the national economy entities.

The concept of the national economic entity's strategy has finally found its place and is reflected in the theory of imperfect competition, and above all comes from the so-called industrial economy. The revision of the paradigm "sectoral structure - behaviors - results", noted by M. Porter, which suggests the potential impact of the strategy on the market structure, allowed to consolidate the strategic perspective in economic theory [1].

Thus, the dominant view is that certain market elements, or intra-market barriers, administrative barriers, cross-price elasticity of food products, determine the strategic outcome or set the framework within which business entities must segregate an adequate strategy in proportion to their weaknesses and the strengths of business and the disciplining impact of the external macroeconomic environment. Strategic sectoral management should have a modern innovative set of solutions and tools that will ensure the formation and implementation of market development strategies in the food industry.

Strategic sectoral management should have a systematic approach to managing strategic change in the food industry, including:

- positioning the industry entity by planning its strategy and capabilities;
- prompt response to negative phenomena and processes in real-time;
- systematically targeted overcoming of resistance in the process of implementation of the

sectoral strategy.

The main factors that influence the sectoral strategy:

- the mission and goals of the food industry;
- scope of activity of the food industry entities;
- the criteria for the distribution of resource provision;
- structure of capital investments by types of products;
- the degree of diversity of operating results and the diversification of the entities of the sector;
- structure and orientation of economic activity of food industry operators in the recent period;
- indicative opportunities of food industry operators;
- monopolization in the food industry market;
- the attitude of the food industry operators to the financial risks, taking into account the actual practice and the implemented financial policy;
- the level and degree of concentration of efforts in innovation and investment activity;
- strategies of individual functional areas (operational, investment, financial, marketing and other activities);
- attitude to external threats.

An industry-specific business portfolio research or portfolio analysis is a powerful tool for strategic sectoral management. This tool gives an idea that the individual elements of the business are interrelated, and the business portfolio is significantly different from the sum of its parts and more important for the food industry than the status of its individual components. By researching the business portfolio in the industry, it is possible to balance such significant business factors as risk, cash flow, business renovation and more.

Sectoral portfolio analysis helps to identify the differences between the present state of food industry entities and their priority status in the future and to clarify the reasons for these differences in order to invest resources in the most effective areas of business and to withdraw capital from projects that have negative profitability.

Sectoral portfolio analysis assesses the attractiveness of food industry markets and the competitive ability of the industry to engage in business in these markets. The main criteria that are investigated in the sectoral portfolio analysis:

- growth rates of operating results;
- strength of the intra-industry competitive position;
- life cycle stage;
- market share;
- the attractiveness of the industry entity, etc.

The basic stages of sectoral portfolio analysis are as follows:

- defining industry levels for the analysis of the business portfolio of food industry entities, that is, it is necessary to define a hierarchy of levels of analysis of the business portfolio, which should begin at the level of an individual product and end with the overall industry results;
- isolation of segments of the internal and external environment of the food industry

entities in terms of particular tendencies, opportunities, and dangers;

- fixation of research elements used in positioning on business portfolio analysis matrices; isolated elements are different from production elements and can cover operational results in terms of quantitative characteristics (one, two, three, etc.);

- defining the parameters of the business portfolio matrix of food industry entities, which will provide clarity on the collection of necessary information, as well as the choice of variables for which the research will be conducted; as variables in the study of the attractiveness of the industry can be used: the size of the industry market, the relevant results of management, the degree of protection against inflation, the growth rate of the industry market, etc.; The following variables are used to measure the strength of entrepreneurial activity: industry market share, market share growth rate, market share relative to industry leader, and other qualitative or quantitative characteristics;

- identification, measurement, and accumulation of information base for research;

- analysis of information database (data) in the following areas: attractiveness of the industry in terms of the presence of positive and negative aspects in the industry, nature, and degree of industry risk; the competitive position of food industry operators; relevant opportunities and threats that are assessed against industry entities; collateral for non-current and current assets; human capital, which is judged by the entity's ability to compete in an industry;

- geometric construction of the business portfolio matrix of food industry entities, which will provide an objective view of the current state of the portfolio and provide a forecast of the future state of the matrices and accordingly the expected business portfolio of the business segment;

- diagnostic analysis of the matrix of the business portfolio of food business entities, which will provide objective analytical information on the identified parameters;

- determination of the competitiveness of all business units in the food industry entities and the prospects for the development of sectoral markets;

- formation of impartial strategic priorities for each business unit of the food industry entity;

- objective assessment of the compliance of the strategic priorities of each food business entity with the sectoral strategy of functioning and development, first of all, in terms of the level of resource provision and socio-economic efficiency;

- identification of the desired business portfolio that will maximally contribute to the achievement of the strategic goals of the food industry entity.

The business portfolio analysis matrices of the food industry entities are not a decision-making tool; they indicate the state of the business portfolio that stakeholders should consider when making appropriate decisions. The choice of strategy of the food industry operators is made by the stakeholders on the basis of the research of the key factors that characterize their status, but taking into account the results of the analysis of the business portfolio, as well as the nature of the implemented strategies of functioning and development.

It should be noted that stakeholders should develop alternative scenarios of matrix change dynamics. The first alternative scenario is based on extrapolation of existing trends in food



industry entities development and sector, the second one focuses on favorable features, the next scenario takes into account force majeure, and finally, the final alternative scenario reflects the priority functioning and development of the entity.

The visualization of the dynamics of matrix change provides an awareness of the adequacy of the transition of a business portfolio by business units to a new condition, in order to achieve the goals of the food industry entities. To do this, stakeholders must assess the overall condition of an entity's business portfolio. Particular attention should be paid to clarifying the relevant characteristics of the food business entity's projected portfolio status:

- the portfolio generates issues, ambiguities, and other negative aspects;
- the portfolio has vulnerabilities in case of negative aspects;
- weaknesses in the business portfolio of the industry entities;
- the portfolio includes a sufficient number of business units in attractive sectors of the food industry;
- the maximum number of effective operating results in order to create prospects and finance new business results;
- the portfolio ensures generating cash flows from the food industry;
- visualizes reserves of potential opportunities in the business activity of industry entities;
- the portfolio ensures maximizing the efficiency of the food industry entity;
- highlights the risks associated with the functioning and strategic development of the food industry entities;
- determines constructive or destructive measures to achieve the selected strategic priorities of food industry development based on the principles of coherence of actions and processes.

Therefore, depending on the objective and valid answers to a specific range of questions, stakeholders may see the need to form a new portfolio of results of the operational activities of the food industry entities.

When choosing a food industry entities strategy, the relevant factors that influence it must be taken into account. It is well known that for any macroeconomic environment the state of the industry and the position of the sectoral economic entities play a significant role in the selection of strategic priorities for the functioning and development of the food industry entity.

In the food industry, leading business entities should strive to maximize the strategic opportunities generated by their leadership and to strengthen this position in the context of enhanced international integration processes under the influence of globalization factors. Leading actors in the food industry, depending on the socio-economic status of the industry, choose different strategic priorities of operation and development.

Practical experience shows that if any industry is stagnant, it is first and foremost necessary to focus on developing a diversification strategy for operating activities, but if it is booming and growing effectively, then the choice is obvious - a strategy of prioritized concentrated growth based on the integration component.

The strategic goals of food industry operators ensure the uniqueness, originality, and adaptability of strategic priorities for a particular business entity. Strategic goals are desirable

guidelines of the entity, so if they do not imply the intensive functioning and maximization of operating results, then no appropriate strategies can be implemented, even if there are prerequisites both in the industry market and in the food industry entity's potential.

Effectiveness of the food industry functioning is a complex parametric estimation of the final results of the use of current and fixed assets and human capital in the food industry entities, over a certain period of time, under the influence of the relevant factors of the internal and external environment.

Economic results, as a historical category, express the totality of socio-economic relations that are mediated in monetary terms and appear between economic units at different stages of the life cycle and influence the formation of a strategy for the priority functioning and development of the food industry.

Economic theory has underpinned three kinds of factors to the formation of work results in the resource approach: labor, capital, land, while in the Marxist concept exceptional importance was attached to living labor, and other indicators were regarded as derivative or dependent on it, unlike the claim of some scholars on equality all three factors in value creation and the reasonableness of revenue sharing according to the contribution of each of them to the product. The problematic nature of economic performance and its impact in determining strategic priorities is one of the most complex and debatable in scientific and practical terms in modern economic theory. Given the economic nature, on the one hand, the result is the difference between cash inflows and cash payments, on the other, the difference between the assets of an entity at the end and the beginning of the reporting period [3].

When formulating strategic priorities in the food industry, it is essential to take into account the efficiency of the process of utilization and interaction of relevant resources used in the production of products (works, services) in the food industry. Main resources: capital, entrepreneurial and professional properties of stakeholders, labor and natural resources.

In an adaptive economy, each of these resources presents a global resource market, which in turn consists of several markets for a particular resource. Considering the fact that costs arise in the process of purposeful consumption of resources, it can be argued on the transformation of resources through costs into the final results of the food industry [3].

The financial resources of the food industry have a significant impact on the strategic priorities for the operation and development of the industry. Appropriate changes in the behavior of industry actors, including entry into international markets, the creation of an innovative product, require significant financial costs, so entities that have the appropriate investment or easy access to it are better placed to determine strategic behavior position and have a far greater number of policy options to choose from than less-favored entities.

Strategic development of food industry entities is possible when their responsibilities as economic entities are properly fulfilled at all levels of management, taking into account potential opportunities and threats, as well as their respective strengths and weaknesses. Therefore, human capital (employee qualification), as well as financial resources, are a limiting factor in choosing a strategy for the priority functioning and development of a food industry entity.

The deepening and development of the employees' qualification potential is a strategic

condition that will provide an opportunity for innovative orientation of the food business entity strategy. The lack of analytical information on the qualification potential of the workforce makes it impossible for management personnel to be involved in choosing a strategy for the priority functioning and development of the food industry entity.

In formulating strategic priorities in the food industry, the number of results, their significance and impact depend on the opinion of the researcher, as well as on the details of the description of the current state of the economic system in the industry entity. Therefore, the development of general principles for identifying the results that influence the formation of a strategy is important theoretically and methodologically.

Conceptual principles for the formation of strategic priorities in the food industry are as follows:

- the principle of the methodology generality - the indicators used in the formulation of the strategy should be acceptable for most objects of the industry;
- informative principle - indicators used in the formulation of the strategy should fully reflect the phenomena and processes inherent in the food industry;
- principle of development - the level of relevant indicators should translate the priority directions of development of the food industry entities, which will be taken into account when formulating the strategy;
- the principle of interests' balance - the indicators must satisfy the requirements of all stakeholders who are involved in the formulation and implementation of the strategy;
- the principle of criteria values - the level of the identified indicators must meet the established parameters, taking into account industry characteristics and current standards;
- the principle of taking into account the effect of economic laws - indicators should be determined to take into account the law of saving time and the law of increasing the efficiency of activity of food industry operators;
- the principle of achievement of strategic goals - when formulating a strategy, strategic goals must be taken into account, the solution of which will ensure its realization.

The principles of forming strategic priorities in the food industry, as well as their corresponding characteristics, refine the process of selecting relevant indicators of the activity of the industry entities, which are used in the development of the strategy.

In formulating strategic priorities, commitments to previous strategies that create inertia in the functioning and development of the industry are of great importance. It should be noted that it is impossible for food industry operators to abandon their previous commitments in connection with the transition to new strategies, so when defining strategic priorities it is necessary to take into account the fact that the obligations of past periods continue to act and may influence (deter) mechanism for introducing new strategies. In order to minimize the impact of the negative aspects of past obligations, they should be taken into account when selecting new strategies and ensuring that they are implemented in the process of executing the new strategy.

For food industry operators, the degree of dependence on the external macroeconomic environment significantly influences the choice of strategic priorities for their functioning and development. Quite often, the external dependence of business entities can play a more

significant role in the choice of its strategy. As a rule, external dependence may be conditioned by the legal regulation of the behavior of the food industry, socio-economic constraints, conditions for interaction with public institutions, environmental impact, political instability, and other aspects.

When choosing a strategy for the functioning and development of the food industry, the time factor is also important, as threats to businesses and planned changes have a specific timeframe. Therefore, the implementation of the strategy should take into account the calendar time and duration of the stages of its implementation. It should be remembered that food companies can only implement the strategy under favorable conditions.

The procedure for evaluating the chosen strategy of functioning and development of food industry actors is oriented towards the achievement of the entity's strategic goals.

If the strategy chosen is in line with the strategic goals of the entity, then its subsequent evaluation is carried out in the following directions:

- compliance of the chosen strategy with the requirements of the stakeholders, i.e. it is checked whether the strategy meets the requirements of the main stakeholders;
- to what extent the factors of the dynamics of the industry market and the dynamics of the product life cycle are taken into account;
- the impact of the process of strategy implementation to the emergence of new competitive advantages in the industry market;
- influence on the development of the national macroeconomic environment of the country, etc.

In assessing the suitability of the chosen development strategy and the capabilities of the food industry, it is necessary to determine how the selected strategy is in line with other strategies (intra-corporate, intra-sectoral, inter-sectoral, etc.).

An integral part of any strategy is economic processes that ensure the functioning of the food industry entities. Economic processes have certain characters, conditions, parameters, and guidelines that are constantly influenced by many factors in the market environment: industrial, technical, technological, social, environmental, financial, economic, political, integrative, etc. Therefore, the constant presence of such variable factors of influence in the economic activity of the food industry entities assumes risks in the implementation of the chosen strategy. Risks reflect phenomena that have many inevitable and quite opposite real bases for the implementation of the chosen strategy. A risk is an extraordinary event or a group of related contingencies that can cause any harm to a food industry entity in the implementation of the chosen strategy.

Risk justification in the food industry in the implementation of the chosen strategy is carried out in the following areas:

- objective realism of the prerequisites underlying the choice of strategy of functioning and development of the industry entity;
- the scope of the negative consequences for the food industry operator in the implementation of the chosen strategy;
- probability of strategy failure and its consequences;
- socio-economic efficiency, taking into account the impact of the risks involved.

Risks in implementing the chosen strategy have consequences both tangible and intangible.

The basic objective of the chosen strategy is to reduce the risk of its implementation, which is due to the uncertainty of achieving the strategic goals in the context of many factors, which can be both accidental and unpredictable for the industry entity. When implementing the strategy, the risk management tasks include:

- substantiation of the policy of intra-industry risk management;
- determining the likelihood of risk associated with the implementation of the chosen strategy;
- quantitative measurement of risk intensity;
- identification of risk factors that are exposed or not exposed.

Setting strategic priorities in the food industry in view of the risk involves the implementation of certain sequential actions:

- identifying factors that increase or decrease a particular type of risk to achieve strategic priorities in the industry;
- diagnostics of identified indicators in terms of the power of influence on risk;
- analysis and adequate assessment of a particular type of risk;
- setting a managed objective level of risk;
- assessment of individual components of strategic priorities in terms of compliance with an acceptable level of risk;
- developing appropriate risk mitigation measures to achieve strategic priorities.

Thus, the risks of adverse events that are associated with the implementation of the chosen strategy of functioning and development of the food industry entities are a significant issue and a basic parameter of the danger for the industry.

High levels of intra-industry and inter-industry competition, development of innovative technologies require food industry operators to formulate strategic priorities and develop modern effective strategic behavior that will maximize socio-economic and economic performance. Therefore, subject to certain conditions, the food industry seeks to transform potential competing entities into partner entities in order to provide more favorable operating and development conditions.

Existing models of competitiveness enhancement include the integration strategies of food industry development, which in turn influences the strategic priorities of the industry.

Investigating the peculiarities of the functioning of integrated business structures in the industry, we will note that the main reasons for the development of integration at the level of the food industry are increased competition, the concentration of capital, availability of resource base, the need to minimize transaction costs by adjusting optimal interaction and counterparty interaction.

Prominent researchers, A. Thompson and A. Strinkland, insisted that "the main reason for integration is to strengthen their competitive position in the market" [2].

The integration of food industry entities has the marks of a corporate strategy and has the effect of improving their sustainability, economic stability, increasing the efficiency of

operations, diversifying their business activities to reduce risks and more.

Under the sectoral integration strategy, we propose to consider the establishment of such relationships between food business entities that ensure the long-term approximation of the strategic goals of the integrating industry entities and address all the tasks identified through sectoral strategic planning.

Taking into account the modern theoretical and practical aspects of economic science, the author offers a structured system of the main tasks of the integration sectoral process, which should be aimed at increasing:

- results from operating activities;
- results from financial activities;
- results from investment activities;
- target results;
- interim results;
- exogenous results;
- endogenous results;
- economic results;
- financial results;
- social results;
- environmental results;
- quantitative results;
- qualitative results
- innovative results;
- intellectual results.

Thus, the author proposes using these indicators to investigate the effectiveness of the implementation of integration strategies using matrix tools of industry portfolio analysis. Matrices are a convenient tool in comparing different food business entities operating within the same market, as well as the different activities of individual businesses.

Investigating the formalization aspects of the strategy matrix of A. Thompson and A. Strickland, we propose its adaptation taking into account the sectoral feature (Fig. 3.1.).

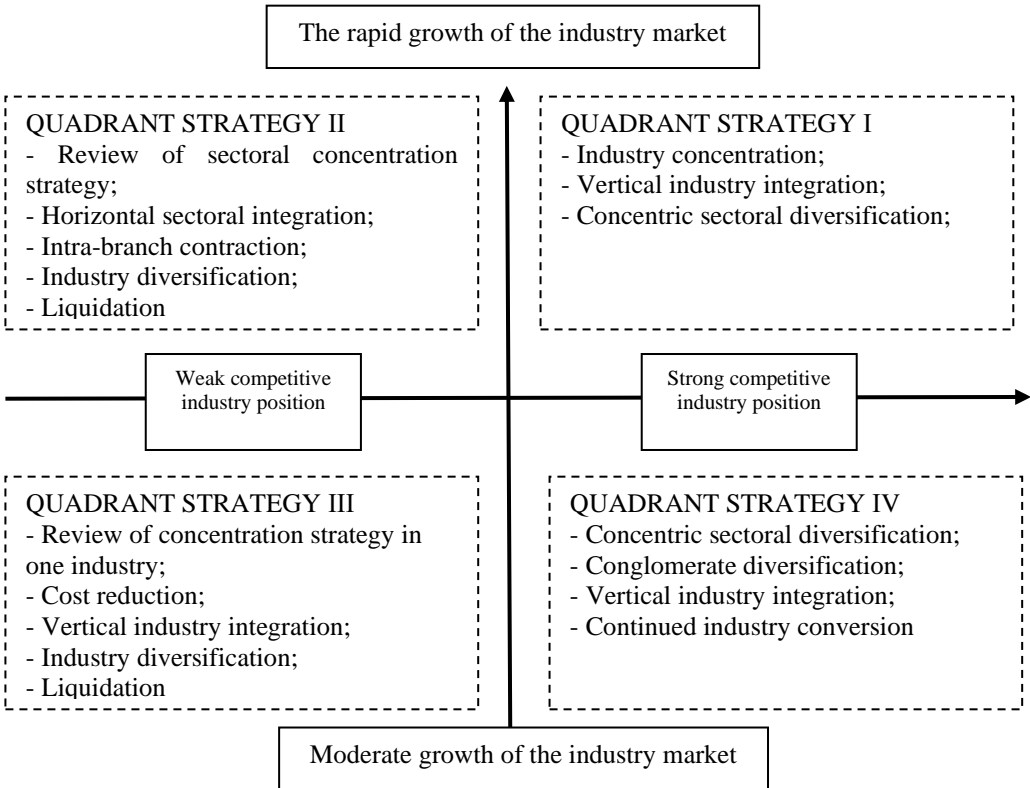


Fig. 3.1. Matrix of sectoral strategy, depending on the dynamics of market growth and intra-industry competitive position

The sector strategies listed in the matrix are presented in the order of their strategic priority. Food business operators with high growth rates and weak competitive position, Quadrant II, should determine why results are negative, what is needed to strengthen their intra-industry competitive position, as well as calculate their ability to update their competitive strategy, taking into account significant growth rates of the industry market.

Thus, the strategy of functioning and development of food industry entities is a set of purposeful measures, approaches, and actions that are characterized by strategic character and considered appropriate in the conditions of the increased competitive environment taking into account the existing trends in the national economy, technology development, human capital and stakeholder needs under the influence of factors of internal and external environment. The sectoral strategy should be permanent and should be gradually adjusted to take account of personalized responsibility.

The speed of response of food business operators to external challenges and risks depends on the timeliness and completeness of monitoring and diagnostics of their impact on sectoral economic activity, which is reflected in obtaining the expected results. For the food industry, individual changes in the environment can lead to a radical revision of the developed strategy of functioning and development of the entity. Constant changes in the environment make it difficult to formulate an optimal strategy.

The sectoral strategy must comply with the principles of general and specific management, have an efficient sequence of processes and actions, providing a competitive advantage in the conditions of innovative development of the macroeconomic environment.

The development of modern market economic systems in the conditions of constant transformation and reformation of socio-economic processes testifies to the need for dynamic changes in the sectoral segment, which will ensure the permanent growth and development of the food industry entities. It should be noted that any strategy provides an opportunity to benefit from the proposed changes that will ensure the priority development of the industry.

Sectoral strategy is a long-term qualitative balanced priority direction of functioning and development of food industry entities, concerning the sphere, means, methods, mechanisms,

and models of their activity, system of interconnected internal processes, as well as the position of the industry in the environment of macroeconomic environment, which, in turn, ensures the achievement of strategic goals. This interpretation of the strategy eliminates the determinism in the behavior of the industry entity since the strategy forms the priority of the development of the economic entities and leaves the freedom of permanent choice taking into account the changing factor environment.

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## ECONOMIC FACTORS OF EDUCATION

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### **Abstract**

Systemic reform of education should be the subject of social consensus and education is one of the main levers of civilization and economic development. The result of the reform should be a comprehensive transformation of the education sector. Education is a self-regulatory system that is constantly changing in accordance with the challenges of social development. Education is a transformational factor of the knowledge economy, an innovative environment in which participants in the process acquire skills and abilities to independently acquire knowledge throughout life and be able to apply the acquired knowledge in practice. Education should produce a person capable of accelerating economic growth and cultural development of the country, conscious, socially active citizens, competitive in European and world labor markets. Education must be a real guarantee of ensuring high social standards.

**Keywords:** economic factors, education, reform of education, innovative environment, social standards.

Comprehensive updating of the educational legal and regulatory frameworks in the field of science and education creates legal preconditions for expanding the accessibility and effectiveness of education. For the progressive development of education there is a need to develop draft laws in the field of education:

- Compliance with the Constitution of Ukraine;
- Integration of educational space through legislative establishment of law;
- Mandatory systematic research before drafting the bill;
- Comprehensive development and functioning of the state language;
- Observance of the balance of social and economic policy in the field of science and education;

- Definition of education as a new economic policy of the state;
- Interaction and interpenetration of educational and economic spheres;
- Updating the content of education at all levels should be carried out reasonably, comprehensively and systematically on the basis of causal analysis of the interaction of education and industry on the impact of relationships and focus on positive outcomes in the context of ensuring quality education "cost-effectiveness - efficiency".

The priorities of the education sector are:

- I. Achieving European and world level of quality and accessibility of education.
- II. Innovation of education: improvement of organizational and legal mechanisms of industry management, effective combination of educational and scientific processes.
- III. Improving the social status and prestige of teachers and scientists.
- IV. Effective cooperation with business, production, creation of a new economy of education, rational use of financial and material resources.

Development of national education in 2017. One of the priorities of state policy is preschool education in 2017, which defines ensuring the availability of preschool education for preschool children and providing the necessary conditions for the functioning and development of the network of preschool education institutions. In pursuance of the Government's Priority Action Plan for 2017 to expand the network of preschool institutions, the Prime Minister of Ukraine instructed the Ministry of Education and Science of Ukraine to develop and adopt orders by the Cabinet of Ministers of Ukraine from 06.12.2017 № 871-r "On approval of the action plan for 2017-2019 of gradual creation of additional places in educational institutions for preschool children". The action plan is based on regional plans to create additional places for preschool children and provides for the creation of 96 thousand places from 2017 to 2020. According to the regional education authorities, in 2017 the network of preschool institutions amounted to 15 thousand 433 institutions, with almost 1 million 335 thousand children. There are 112 children in 100 places. The coverage of preschool children in preschool education institutions is 85%, and for older preschool children - 95%. During 2017, more than 27,000 additional places for children were created in functioning preschool institutions and due to the development of a network of kindergartens through the commissioning of new buildings - 31 (Kyiv region - 6; Ivano-Frankivsk region - 5, Lviv - 4; Vinnytsia, Volyn region and the city of Kyiv 3 each, Dnipropetrovsk, Ternopil region - 2 each, in Kharkiv, Kherson, Poltava - 1 each).

Ukraine's course towards European integration, strengthening the processes of informatization of society involves the transition to innovative higher education, which requires training a new generation of highly educated professionals capable of implementing dynamic economic development based on high educational and science-intensive technologies. vital activity. Not only sound education but his alertness and dedication too are most required. Solving problems requires the creation of an effective system of support for gifted student youth, the wider development of forms of research, the formation of effective youth science. Solving problems highlights the problem of forming the motivation of student youth to creative work, intensive development of intellectual abilities, creative approach to the acquired knowledge and specialties.

Higher education is a resource system that aims to produce the intellectual potential of the nation. An important source of economic growth is the economic role of education and science, which were defined only as industries that consume but do not produce. Therefore, the growth of the nation's intellectual potential by investing in the acquisition of knowledge, competencies and skills in education, dissemination of information on the functioning of the economy and labor market at regional and national levels ensure the development and realization of intellectual and physical capabilities. The development of science, education of citizens, the level of application of innovative technologies and information communications determine the level of global competitiveness of Ukraine. Education should be considered as an important factor in economic growth, as a factor in increasing productivity at the regional and national levels. A sign of high competence and qualification of labor resources is the presence of higher education among the population. This motivates the policy of stimulating the quality of professional training of citizens, even if it requires significant expenditures of the state budget. It is time to effectively implement the concept of continuing education and lifelong learning. Thus, the higher education system, being in the external environment, is undoubtedly affected by demographic, ethnic, political, socio-economic, legal, international, scientific, educational, market factors that are constantly changing in space and time and have different intensities. In view of the above, its components (regions) have different potentials, opportunities and the ability to adequately respond to these changes in order to provide citizens of the region with quality higher education. It is in the regions that a concept is being formed that hinders the development of the regional system of higher education in the field of competitiveness at the national level.

The synergetic effect of the competitiveness of the national higher education system is equal

to the sum of the vectors on this basis of regional systems. Higher education institutions and the environment of the regions are not in static but in dynamic equilibrium, their ratio is constantly changing, therefore, the process of adaptation to new conditions that may arise suddenly. Response to the extreme impact of environmental factors can be based on the results of monitoring studies. This is a dynamic process, so higher education institutions and the system as a whole at the regional and national levels, despite the changing conditions, are trying to maintain the sustainability necessary for effective existence and development in the context of quality assurance in higher education. In this regard, the processes of adaptation to change include not only the optimization of the functioning of higher education institutions in the structure of the region, but also the maintenance of balance in the system "university - environment". The process of reducing the period of adaptation should be implemented every time there are changes in the system "university - environment". This will effectively affect the use of their own capabilities and potential, there is a need to take preventive measures to overcome threats, risks and possible crises in the long run. Process management can be effective if you use continuous real-time monitoring of the situation. It is necessary to manage the process soundly, comprehensively and systematically, to clearly present the goals and risks, to strategically achieve the best results. Given these positions, there is a problem of information management system.

At the stage of development in the socio-economic crisis - the higher education system and its components must ensure the functioning of the format "economy - efficiency - effectiveness", which will implement the target function of optimizing the cost of training with higher education without reducing its quality. Thus, the strategic direction of action to optimize the links between economic growth and the level of education of the nation is to effectively use investment in education while ensuring its quality, which will promote the abilities of citizens and their participation in production, services, culture and humanitarian sphere. on European values and standards. Only with the implementation of a sound, comprehensive and systematic approach to solving problems of efficiency and quality, higher education in Ukraine can become competitive in the European and global markets for educational services.

The higher education system of Ukraine and its components in the field of quality assurance of higher education operate in conditions of increasing risks arising from changes in external and internal environments, the impact of risks on higher education institutions of administrative-territorial units and the system as a whole depends on their intensity and adequate response of its

components to the dynamics of processes. There are changes in the qualitative and quantitative features of the system, which, depending on the intensity of the factors of influence can be both positive and negative. We note that the final information products and dynamics of the higher education system in a complex internal and external environment, which are dynamically changing in space and time, can be used for strategic education management. Reliability and objectivity of information to higher education institutions, central and local executive bodies for the development and implementation of effective management, information and representation functions, will identify risks (problems), form goals, design basic strategies, ensure their implementation and adjust sustainable development of higher education real-time education in the long run.

The content component of monitoring research, which includes 8 thematic areas, each thematic area has a number of indicators that are used as relative values of structure, intensity and comparability depending on the objectives of monitoring. The calculation of indicators is based on a reliable, objective and accurate primary information base, annual statistics of the State Statistics Service of Ukraine "Basic indicators of higher education institutions at the beginning of the school year". Indicators of thematic areas provide an opportunity to assess the state and changes in qualitative and quantitative features of the system that occurred during the trend period under the influence of external and internal factors, identify strengths and weaknesses, anticipate possible threats, risks and crises and take preventive measures to prevent them. Thematic areas of the system of universities, academies and institutes - network potential, diversification of sources, funding, diversification of forms of education, diversification of the number enrolled in the initial cycle of education by sources of funding, diversification of those enrolled in the initial cycle of education, internationalization of higher education.

To identify the dynamics of changes in certain indicators of universities, academies, institutes, relative values are used, which indicate their change over time in relation to the base 2007/08 academic year in the format of thematic areas. Final information products that reflect the state and changes in the qualitative and quantitative characteristics of the higher education system (universities, academies, institutes). The potential of the network is decisive and reflects the ability of higher education institutions of III-IV levels of accreditation (universities, academies, institutes) to provide citizens with quality educational services. The transition to a model of sustainable development of higher education, while overcoming possible crises and successfully

solving other complex problems is possible only with the implementation of objectively determined, scientifically sound, synchronously implemented system of national, sectoral and regional measures. Measures should be aimed at the implementation of qualitatively new innovative technologies and the organization of training with higher education, effective tools and methods to stimulate participants in the educational process.

It should be emphasized that ensuring the quality of higher education in the format of "higher education - the environment", preserving its potential at the present stage is a very complex process. Demographic, socio-economic, political, legal, international situations significantly affect the state of higher education, its parameters change, can have both positive and negative consequences. First of all, it concerns the potential of the network, which determines the number of higher education institutions and the contingent of students by forms of ownership, pedagogical potential. The outflow of the functioning environment of universities in the formats "science - education - technology" and "economy - efficiency - effectiveness" is problematic. Answers to the question of possible changes in the qualitative and quantitative features of the potential of higher education are the result of monitoring studies. To determine the indicators of the network's potential, data are used that represent the network and the number of students of universities, academies, institutes by forms of ownership within the trend period 2007/08 - 2017/18 academic years.

One of the most important problems for Ukraine today is to bring the economy out of crisis, these problems are related to higher education, which produces human resources, the quality of which depends on sufficient financial, material, personnel, information and organizational needs of higher education institutions. It is the satisfaction of these needs that ensures the effectiveness of their activities in the field of competitiveness and requires special attention from central and local authorities in the strategic time interval.

The contingent of students is a leading component of the educational process of training with higher education in the context of ensuring its quality. The quality of the contingent is decisive in the external and internal assessment of the reputation of higher education institutions in the market of educational services and the labor market. It is known that the level of quality of the student body will increase when the vocation and satisfaction of their own needs of the subjects of the educational process when choosing future professional activities coincide with positive motivation when choosing a specialty and university, ability, desire and confidence to carry out

competent professional activities. life. However, the processes of staffing students and learning are influenced by a number of external and internal factors (political, socio-economic, legislative, demographic, etc.), which change dynamically in space and time and significantly affect the formation of motivational and social factors in the positioning of citizens. in the market of educational services depending on their age. Thus, the ability of the university to adequately and timely respond to changes in these factors depends on the period of adaptation to new living conditions of the university, the region and the system as a whole. In this direction, the main strategy for maintaining a quality contingent is to ensure the quality of higher education, regardless of the form of education in the face of possible threats, risks and crises of resource provision.

Demographic situation. The segmentation of the educational services market is based on a number of key variables, including geographical, demographic, psychographic and behavioral. Demographic variables are the most popular factors that form the basis for different consumer groups. An important factor for the higher education system is the change in the contingent of students by age, which to some extent characterizes the motivational and social aspects in the context of higher education. Thus, the age of persons enrolled in higher education institutions is an input parameter for the formation of the age structure of the student body. The range of age structure is from 14 to 35 years. The systemic crisis, which has affected various aspects of social, economic and socio-political life, is also affecting the contingent of students on a demographic basis. Differentiation of the contingent of students by demographic variable is the distribution of the contingent by age and age groups. In the Free Economic Zone (universities, academies, institutes) of Ukraine, 1,538,565 citizens receive higher education in full-time, part-time and part-time forms of education. In the structure of the contingent of students of Ukraine, the share of students of universities, academies, institutes is 86.4%, and colleges, technical schools and colleges - 13.6%. 216 Attention should be paid to the significant diversification of the contingent of students in the forms of higher education institutions according to the levels of accreditation, which are formed under the pressure of motivational and social factors.

Scientific and pedagogical potential significantly affects the quality of higher education. The availability of full-time teachers, especially full-time teachers, to some extent determines the quality of educational services. Increased attention to competition in the market of educational services is focused on the effectiveness of the educational process, which must be based on the

integration of science, higher education and technology. This is to ensure the reputation of the university. This mission of the higher education institution is successfully realized under the conditions of active and responsible position of teachers with scientific degrees, academic titles in ensuring the quality of the educational process.

Increased attention to the quality of scientific and pedagogical potential will allow the university to train personnel with higher education in the format of "science - education - technology". To implement the principle of continuous adaptation of higher education to the progressive development of science and innovative technologies, it is necessary to ensure the functioning of the university in the format of "science - education - technology". This means that the effectiveness of scientific and educational activities significantly depends on the involvement and participation of scientific and pedagogical workers with scientific degrees, academic titles in the implementation of strategies for scientific development in combination with the process of training competent personnel with higher education. As of the beginning of the 2017/18 academic year among scientific and pedagogical workers 13,582 teachers have the degree of Doctor of Science, 61,157 have the degree of Candidate of Science, 11,476 teachers have the academic rank of professor and 42,414 teachers have the academic rank of associate professor. It is very important to have an idea of the changing trends of scientific and pedagogical potential for forecasting the situation and making informed and informed decisions aimed at overcoming possible threats, risks and crises.

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